

Complete this audit to identify gaps in your patient journey to enhance the patient communication experience and increase treatment acceptance

Marketing Strategy

Organic social content strategy

Posting content across

- Facebook
- Instagram
- TikTok
- Snapchat
- LinkedIn
- YouTube

In the following placements

- Feed
- Stories
- Reels

Patient testimonials

NOTES

Patient journey and behind-the-scenes content

NOTES

Education about orthodontics and ClearCorrect

NOTES

ClearCorrect webpage created on practice website

NOTES

Selfies with patients for treatment starts and progress

NOTES

Downloaded ClearCorrect social media pack and customized posts

NOTES

Internal Marketing

Check-up to include conversations about monitoring tooth movement

NOTES

Introduced free IOS scans for general patients

NOTES

Display ClearCorrect POS literature in reception area

Poster

Leaflets

Totems

ClearCorrect videos on waiting room TV

NOTES

Use ClearCorrect refer a friend card to increase word of mouth referrals

NOTES

Schedule one ClearCorrect discovery day each quarter

NOTES

Paid media & lead generation

Facebook & Instagram Ads

NOTES

Google Ads

NOTES

TikTok Ads

NOTES

YouTube Ads

NOTES

Snapchat Ads

NOTES

Enquiry follow-up communication

Communication post-enquiry and post-consultation to increase the treatment acceptance conversion rate.

12-week initial enquiry follow-up process

NOTES

Enquiry response templates for email and SMS

NOTES

12-week post-consultation follow-up process

NOTES

Post-consultation communication template for Email and SMS

NOTES

Use ClearCorrect new patient telephone script and prompt card.

NOTES

Share patient before and after photos in follow-up

Initial enquiry Post-consultation

NOTES

Share video testimonials in follow-up

Initial enquiry Post-consultation

NOTES

Share Google reviews in follow-up

Initial enquiry Post-consultation

NOTES

Use a CRM system

Initial enquiry Post-consultation

NOTES

Consultation and Consent

Pre, during and post-consultation communication

Email and telephone script informing the patient about what to expect during the initial consultation and journey.

NOTES

IOS Scan showing basic before and after simulation

NOTES

Patient photography and co-diagnosis

NOTES

Share video testimonials in consultation

NOTES

Share Google reviews in consultation

NOTES

Discuss costs, finance options and next steps

NOTES

Share ClearPilot simulation with the patient:

- Email to the patient
- Present via video call
- Present in TCO appointment
- Present in dentist appointment

NOTES

12-week initial enquiry follow-up process

- Thank you email
- Thank you card

NOTES

Consent appointment

**Approve in ClearCorrect Doctor Portal
for aligner manufacture**

NOTES

**Finance application with patient
and deposit payments**

NOTES

Consent explanation and forms signed

NOTES

Treatment

Patient communication during treatment and processes

Aligner fit appointment

Aligner fit and instructions

NOTES

Aligner care instruction

NOTES

Review appointments

In-person review appointment with dentist

NOTES

IPR Engager appointments and education

NOTES

New aligner set handover process

NOTES

Treatment Complete

Your end of treatment processes to enhance the patient experience, create marketing content, encourage social proof and referrals

Treatment completed

Thank you and celebration	<input type="checkbox"/>	NOTES
Wire retainer	<input type="checkbox"/>	NOTES
Removable retainer and education	<input type="checkbox"/>	NOTES
Hygiene and dental plan explanation	<input type="checkbox"/>	NOTES
Additional treatments discussed e.g. composite bonding or porcelain veneers	<input type="checkbox"/>	NOTES
Google review request	<input type="checkbox"/>	NOTES
Video testimonial request	<input type="checkbox"/>	NOTES
ClearCorrect refer a friend card handover process	<input type="checkbox"/>	NOTES
Social content creation and posting	<input type="checkbox"/>	NOTES
<input type="checkbox"/> Celebration selfie	<input type="checkbox"/> Smile reveal	
<input type="checkbox"/> Mini video testimonial		