

Quick Start Guide:

# A 5-Step Lead Management Strategy

Did you know that lead management is the **#1** area of attrition in your big case business growth? And that a misfiring lead management process can cost dental practices **tens of thousands of dollars** each year and countless case opportunities?

Not to worry, with the right strategy your lead management can be **your greatest asset**. So, we wanted to share some steps and tips that will help you to build a winning lead management strategy and get your practice one step closer to close for all of your big cases.

Trust us, we're experts!



1.

## Review processes & set goals

Review the current status of your sales and marketing operations for big cases to get organized by asking yourself:

- How are we managing leads today?
- What tools are we using to manage leads?
- Is my team trained on how to quickly and effectively qualify leads?
- Who will be in charge of my lead management?

Next, define your goals for the big case side of your business and think about:

- How many treatments do I want to close per month?
- How many leads do I need to manage to get those reach those close numbers?
- How much of my business do I want to devote to big cases?

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## Get set-up with the right tools

2.

Managing a growing practice requires operational efficiencies that easily scale and your lead management process should follow suit. Here's how to set-up the right tools for the job:

1. Implement a robust Customer Relationship Management (CRM) system to track and manage leads effectively
2. Use automation tools within the CRM to schedule follow-ups, send reminders, and keep leads engaged
3. Ensure lead management systems integrate with other practice management tools so you're not duplicating work and leaving room for human error *(Check with your PMS provider)*



3.

## Create a communications plan

Effective communication across your practice and with your patient leads is crucial to the success of your lead management process. Here are a few tips:

- Have a well-written script that Patient Advocates and Treatment Coordinators can follow
- Respond new patient leads and existing communications within minutes, not hours
- Set up automated follow-ups in your CRM to take the burden off your team
- Make patient lead communication as personalized as possible for better response
- Don't inundate leads with messages that will scare them away

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## *Find good folks & train them*

4.

Plans and systems won't be effective without the people to run them properly. You'll need to find good people and train them on your lead management strategy & process. Here's a couple ideas:

- Find people who can build rapport with patients, but are also sales-minded and that know how to close
- Provide regular training for staff on lead management and sales best practices
- Consistently review metrics to improve their performance
- Hire a dedicated Patient Advocate to manage your leads or use a service like ours, which can provide a dedicated Patient Advocate for you



## 5. *Monitor performance & adjust*

Stay on top of your lead management game by reviewing performance and make adjustments to improve conversion rates and patient satisfaction by:

- Tracking key performance indicators (KPIs) like leads contacted, consults scheduled, consults showed, and cases closed
- Regularly reviewing and updating your lead management processes and adjust based on performance
- Keeping up with big case trends in dentistry and implantology
- Track practice growth and contribution from the implant side of the business

Even with a simple quick start guide, lead management can be challenging, that's why we at Briteline are here to take on the lift of lead management for you. Reach out to us at [hello@britelinedental.com](mailto:hello@britelinedental.com) or **312-772-5447**.

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Dental Lead Management