

# Orthodontics Case Acceptance Guide

A case-acceptance guide for orthodontic practices that want stronger treatment-coordinator follow-up, clearer financing guidance, and less friction between consult and start.

Orthodontists, treatment coordinators, office managers, and growth leads

## GUIDE

A case-acceptance guide for orthodontic practices that want stronger treatment-coordinator follow-up, clearer financing guidance, and less friction between consult and start.

## WHAT THIS ASSET COVERS

- A case-acceptance friction map covering financing hesitation, school schedules, adult treatment confidence, and decision delay
- A coordinator workflow for consult follow-up, missing-information cleanup, and next-step clarity
- A monthly review loop for measuring where starts are getting lost and which trust cues need reinforcement

## USE THIS WHEN

1. Treatment starts lag behind consult volume
2. Parents say they need time to think but never come back
3. The practice wants stronger guidance than generic financing scripts

## WORKING ASSET

## WHY THIS EXISTS

Orthodontic starts are often lost after diagnosis, not before it. The patient liked the consult but still hesitated on cost, timing, school disruption, or whether treatment really needs to happen now.

## CASE ACCEPTANCE FRICTION

Track the four most common reasons cases stall:

- financing hesitation
- timing hesitation
- appearance and comfort concern
- low perceived urgency

Every stalled case should be tagged into one primary lane so follow-up becomes more precise.

## **PARENT AND ADULT BUYER SIGNALS**

Parents often need:

- timing clarity
- school and activity disruption guidance
- payment structure confidence
- long-term benefit framing

Adults often need:

- appearance and convenience framing
- confidence around treatment duration
- reassurance about work and lifestyle disruption
- clear aligner vs. braces fit guidance

## **TREATMENT COORDINATOR WORKFLOW**

1. Tag the case by hesitation type before the patient leaves.
2. Send the right follow-up asset inside 24 hours.
3. Re-contact within 3 business days with one new clarity point, not generic pressure.
4. Route unresolved objections back to the right clinical or financial explanation.
5. Flag aging cases weekly for structured rescue follow-up.

## **MONTHLY REVIEW**

Review:

- consults completed
- starts accepted
- stalled reasons by lane
- average days from consult to decision
- which follow-up assets moved the most cases forward

## **OPERATING NOTES**

- Case acceptance improves when the clinic removes uncertainty, not when it sounds pushier.
- Coordinator language should match the buyer's actual hesitation, not a generic script.

## DEPLOYMENT NOTES

### HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Orthodontics Case Acceptance Guide" become shared but unmanaged work.
- Use it with orthodontists, treatment coordinators, office managers, and growth leads in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### BEST DEPLOYMENT SEQUENCE

- Treatment starts lag behind consult volume
- Parents say they need time to think but never come back
- The practice wants stronger guidance than generic financing scripts

### WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A case-acceptance friction map covering financing hesitation, school schedules, adult treatment confidence, and decision delay, A coordinator workflow for consult follow-up, missing-information cleanup, and next-step clarity, A monthly review loop for measuring where starts are getting lost and which trust cues need reinforcement.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.