

# **The Complete Guide to Patient Recall: Boosting Retention, Not Just Your Schedule**



## Overview

Patient recall—often referred to as “recare”—is essential to maintaining a healthy practice. It's about more than filling empty slots in your schedule—it's about patient retention, keeping them engaged and providing proactive care. Here, we'll break down what is at the core of an effective recall system and provide a framework for optimal patient outreach.

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Train your team to assume all patients want an appointment—it's not gap-filling, it's relationship-building.

## Creating the Right Mindset



Patient recall often takes a back seat to more pressing issues faced in the office. However, if done well, patient recall can be an anchor for your business and provide a huge lift for your bottom line. Start by training your staff to think about patient recall and lead them to take responsibility for unscheduled appointments. Train them to assume all patients want an appointment. This will help your team to proactively seek out opportunities and give them a greater sense of purpose when it comes to the success of your business.

## Improving Success with Assigned Ownership

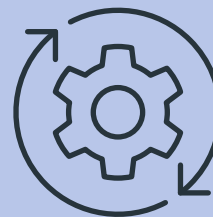
**Assign a recall lead.** For your recall program to be effective, someone needs to be responsible for it. This person doesn't need to be the sole contributor but should be responsible for:

- ✓ Managing processes
- ✓ Measuring success
- ✓ Reporting outcomes

As you are assigning who will be responsible for your program, use the **RACI model** to help define stakeholders and their responsibility roles:

- ✓ Responsible: Who executes on outreach efforts
- ✓ Accountable: Who owns the outcome and reports on success
- ✓ Consulted: Who gives input on processes and tactics
- ✓ Informed: Who stays in the loop throughout the process

This structure helps define the critical roles and responsibilities, boosts team collaboration all while keeping efforts focused.







## Benchmarking and Retention

Dentistry sees a 20% attrition rate—the highest in healthcare. Keep track of your patient base and report on how many active patients (patients who are scheduled) you have vs inactive patients. Help remind your team that replacing patients isn't as effective or profitable as retaining them. Existing patients:

- ✓ Accept treatment more readily
- ✓ Are easier to schedule
- ✓ Have a higher lifetime value

### Focus on retention, not gap-filling.

Retention starts before a patient misses their schedule window and continues for 18+ months after. Don't get discouraged when reaching out to patients who are overdue by more than a year, remembering that many patients respond positively even after a long gap. Frequently

patients respond saying, "I've been meaning to do that."

Another important point on retention—though it may seem obvious—is this: your practice isn't actually growing if new patients are simply replacing existing ones. Many practices overlook patient churn and mistakenly view a full schedule as a sign of growth. But if you're consistently seeing 30 new patients a month and haven't added a hygiene day in years, you're likely just treading water. True growth requires both attracting new patients and maintaining long-term relationships with your existing ones. Retention isn't just about keeping slots full—it's about keeping patients connected.

**Remember: your outreach is a convenience, not a nuisance. Your aim isn't simply to fill the schedule, but keep patients from churning.**



## Optimizing Conversion

Be ready for patient objections. Have a list of common objections and train your team on how to respond to them. A common objection revolves around **insurance changes**. Remember that most patients don't understand dental vs. medical insurance networks. Train your team to educate patients about:

- ✓ Clarify in-network/out-of-network myths
- ✓ Additional payment and treatment options

As time passes, include offers or promotions in your messaging, but never **lead** with discounts. The value of your care speaks louder than price.

## Outreach Strategy – Timing and Outreach

At the core of an effective recall system is a deep understanding of your patient profile: how they prefer to communicate, what kind of value they bring, and what drives their decision-making. With this information, you can tailor outreach that feels personal, not robotic.

Different patients respond to different messages and outreach. Use a **multi-channel** approach:

- ✓ Texting and emails for quick, convenient communication
- ✓ Phone calls for personal connection
- ✓ Direct mail for visual, tangible reminders

Even with added cost, direct mail is worth it. The return on investment far outweighs the expense when patients return to care.

**Start with automation** to reduce the number of manual follow-ups. Always include:

- ✓ Online scheduling links
- ✓ Clear appointment times to choose from
- ✓ Strong call to action (CTA)

Begin recall outreach **2 months before** a patient is due for their re-care appointment. Engaging early leads to better treatment acceptance and improved scheduling success.



# Outreach Framework: The 6 Points of Contact System

## 1

### 2 Months Before Due Date:

Automated text message and/or email.

## 2

### 1 Month Due:

Personal phone call.

## 3

### 1 Month Overdue:

Postcard and personalized text message.

## 4

### 3 Months Overdue:

Automated Weave text followed by phone call.

## 5

### 6 Months Overdue:

Recare Letter #1.

## 6

### 12 Months Overdue:

Recare Letter #2.

# Monthly Recare Protocol Checklist

### Week 1:

- ✓ Send postcards to patients who are 1 month overdue.
- ✓ Call all patients who are 3 months overdue.

### Week 2:

- ✓ Send postcard to patients due in 2 months who aren't scheduled.

### Week 3:

- ✓ Send re-care Letter #1 to patients 6 months overdue.

### Week 4:

- ✓ Send re-care Letter #2 to patients 12 months overdue.

### Week 4/5:

- ✓ Call patients due this month but not scheduled to fill your schedule 3-4 weeks out.

These frameworks were adapted from [Poppe practice management](#).

# Scripts & Templates

## Phone Script

Hi [Beth], this is [Tami] calling from [ABC Dental]! It looks like I didn't get you scheduled for your next cleaning the last time you were in. Can I help you get that scheduled?

## Voicemail Script

Hi [Beth], this is [Tami] calling from [ABC Dental]. It looks like I never got you scheduled for your next cleaning appointment. Believe it or not, it's that time again! Please give me a call back so we can save an appointment for you! (Or if it's more convenient, online scheduling is now available on our website.)

## Text Follow-Up

Hi [Beth], this is [Tami] calling from [ABC Dental]. It looks like I never got you scheduled for your next cleaning appointment. Believe it or not, it's that time again! We have an appointment available on [day] or [day]. Or you can find a time that works best here: [link to online schedule]

## Additional text examples from real offices

### Example 1

Hello [Beth], this is [ABC Dental]. We noticed it's been a while since your last dental appointment. Please reply to this message or call our office at [Practice Phone] and a member of our business team would be happy to get you scheduled.

### Example 2

We noticed it's been a while since your last dental appointment. Please call our office at [Practice Phone] and a member of our business team would be happy to get you scheduled.

### Example 3

Hi [Beth], this is [Tami] from ABC Dental. I'd love to help get you scheduled for your next visit. Please call or text me to find a time that works for you, or you can use this easy scheduling link: [link to online schedule].



## Get the Ball Rolling

The most important step in optimizing recall? Do it. It's easy to forget, delay, or deprioritize. Utilize the above templates and workflows, or create your own, but always empower your team to personalize outreach. Though processes and automation is used in recall, make an effort to ensure it doesn't sound automated—it should sound human.

## Final Thoughts

Effective patient recall is a process—not a one-time push. When done right, it drives patient satisfaction, retention, and long-term profitability. Empower your team, personalize your messaging, and stay persistent. Your patients (and your schedule) will thank you.



See firsthand how Weave  
can enhance your recall  
efforts today.

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