

AI Playbook

Work Smarter, Not Harder



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Inside

- 3 Introduction: AI Practice ready?**
- 4 AI for Patient Communication & Engagement**
 - 5How AI Can Help and What to Do Next
- 6 Revenue Management + AI**
 - 7How AI Can Help and What to Do Next
- 8 AI Workflow & Office Management**
 - 9How AI Can Help and What to Do Next
- 10 AI in Patient Retention & Growth**
 - 11How AI Can Help and What to Do Next
- 12 Closing Thoughts:
AI Makes Every Aspect of Your Job Easier**



Introduction

Your practice relies on you to keep everything running smoothly—but with so much on your plate, there never seems like there is enough time in the day to get it all done. Now, imagine automating the most tedious tasks so you can focus on what actually matters: patient care, a thriving team, and a stress-free workday.

That's where AI comes in.

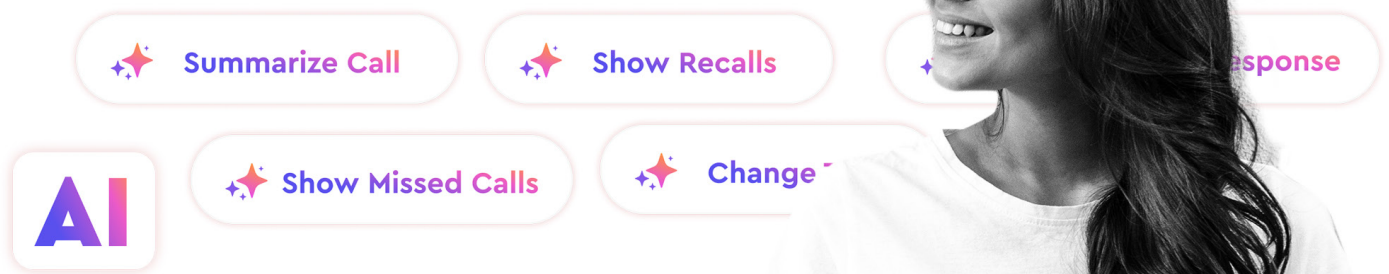
90% of surveyed workers reported that AI helped them save time on work

Source: Tasks aiprm.com

Is Your Practice Ready for AI?

- You're constantly buried in admin work.
- Chairs sit empty because of cancelations.
- Your team spends too much time chasing payments.
- Staff is overwhelmed with manual, repetitive tasks.
- You're losing patients because follow-up is inconsistent.

If you checked 2 or more, it's time to explore AI solutions.



#1

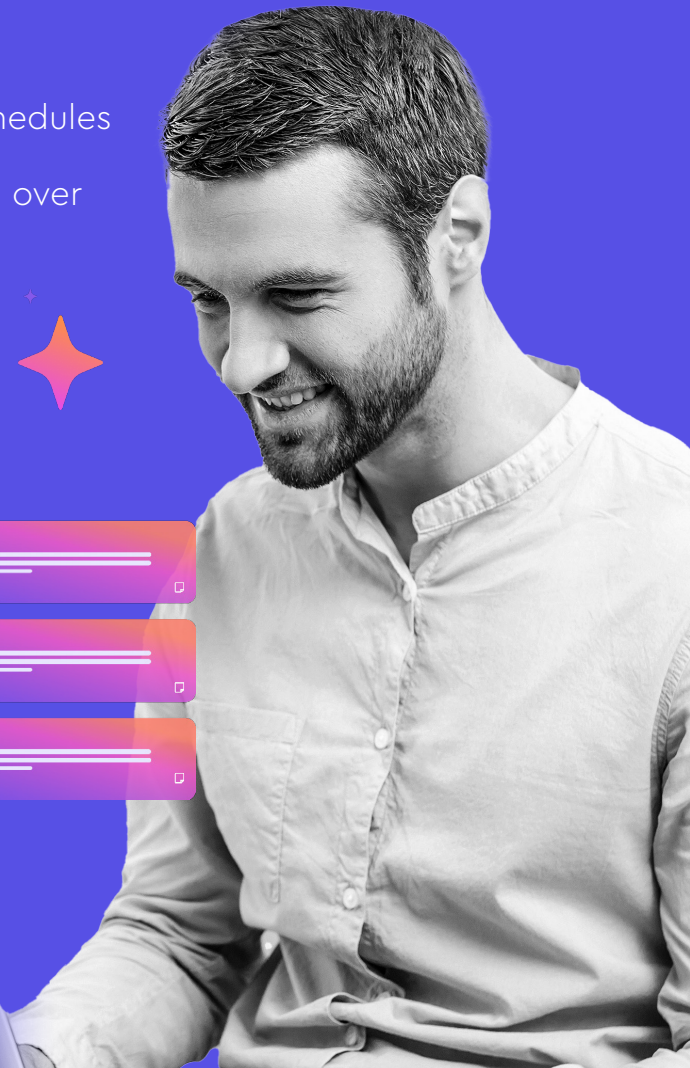
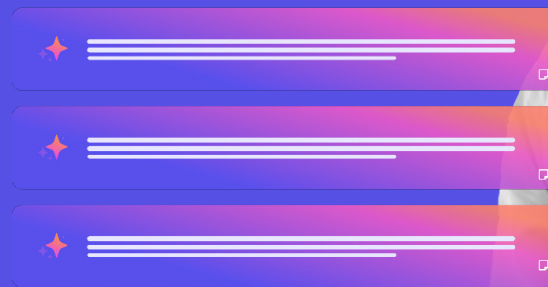
AI for Patient Communication & Engagement

Could AI help you streamline patient engagement? Ask yourself, how often are you:

- Chasing down patients for appointments
- Trying to keep up with patient reviews
- Reading through patient insurance forms
- Dealing with last-minute cancellations and reschedules
- Answering the same patient questions over and over



✦✦ Suggestions by AI Assistant



How AI Can Help

AI can take the burden of appointment management off your plate by helping you send automated reminders and enabling patients to reschedule on their own, significantly reducing no-show rates. **Chatbots and virtual assistants can handle common patient questions, freeing up phone lines and ensuring faster responses.** Additionally, AI can identify patient sentiment to ensure each patient gets the response they need.

What to Do Next

Start by assessing your current needs and identifying gaps in your workflow. Are appointment reminders and rescheduling taking up too much time? Do patient inquiries overwhelm your front desk? Is manual follow-up contributing to inefficiencies? **Recognizing where AI can provide relief is the first step** to finding the right solution.

- Integration: Does this tool integrate seamlessly with my current scheduling, billing, and patient management systems?
- Automation Capabilities: Can it automate manual processes like reminders, rescheduling, and patient follow-ups effectively?
- Customization: Can it help me write personalized messages to fit my office's unique needs?
- Ease of Use: Is the tool user-friendly, and will my team be able to adopt it quickly?
- Analytics & Insights: Does it provide real-time data on patient engagement, missed appointments, and response rates?

Once you've identified a tool that meets these criteria, request

a demo or trial to see it in action. Pay close attention to how well it integrates with your existing tools, as seamless compatibility will be crucial to maximizing efficiency. By selecting the right AI communication tool, you can reduce administrative workload, improve patient experience, and optimize your office's day-to-day operations.

Get Your Team Excited About AI

Some staff might be nervous about AI taking over—let's show them how it HELPS!

Fun Ways to Introduce AI to the Team:

- Host a Meet the AI Lunch
- Bring in coffee & snacks and do a fun demo showing how AI saves time.
- Give AI a Team Name! Let the staff vote on a fun name for the AI assistant.

Why?

Making AI a team player instead of a replacement helps everyone feel comfortable and excited about using it!



TAKEAWAY: AI-driven communication tools can eliminate repetitive manual tasks, reduce patient no-shows, and free up time for more meaningful patient interactions.

#2

Revenue Management + AI

Could AI help you improve your billing processes and increase revenue? Ask yourself, how often are you:

- Dealing with rejected insurance claims
- Chasing down patient payments
- Trying to predict cash flow and revenue trends



How AI Can Help

AI can help streamline revenue management by automating insurance verification, ensuring claims are error-free before submission, and flagging high-risk accounts for proactive payment follow-ups. Interpreting patient insurance benefits is another area that takes a ton of staff time. **AI can help by providing quick, clear summaries of benefits** so everyone clearly understands what is covered, and what is not. Predictive analytics can help you understand patient payment behaviors, allowing you to take action before payment delays occur. AI can also assist with claim processing by identifying common errors and increasing approval rates.

What to Do Next

Start by assessing your current billing workflow. Are manual errors leading to claim denials? Is your team spending significant time following up on payments? Identifying these inefficiencies will help you determine how AI can optimize your revenue cycle.

When evaluating AI billing tools, ask the following questions:

- Integration: Does this tool work with my current billing and patient management systems?
- Automation Capabilities: Can it verify insurance, process claims, and send payment reminders automatically?
- Predictive Insights: Does it provide analytics to help forecast cash flow and reduce financial uncertainty?
- Customization: Can I tailor automation rules to match my practice's specific needs?
- Security & Compliance: Does it protect patient data and meet industry regulations?

66% of managers are implementing AI tools in the workplace to enhance productivity and efficiency.

Source: beautiful.ai

Once you've selected a tool that meets these criteria, test it with a small batch of claims and payments. Pay close attention to how well it integrates with your existing systems and whether it significantly reduces manual effort. A well-chosen AI billing tool can minimize errors, speed up revenue collection, and improve the financial health of your practice.

Hot Tip: Use AI to Make Messages More Friendly

AI can help you craft friendlier messages.

For example:

"Hi! This is XYZ Dental Practice confirming your next appointment. If you need to reschedule or have a quick question, I've got you covered!"

Why?

Patients feel more comfortable when messages are warm and helpful.



TAKEAWAY: AI-powered revenue tools help eliminate billing errors, improve cash flow predictability, and reduce the stress of managing payments and insurance claims.

#3

AI Workflow & Office Management

Could AI help you streamline office workflows? Ask yourself, how often are you:

- Performing too many repetitive, manual tasks
- Adjusting staff schedules to accommodate workloads
- Doing endless paperwork and data entry

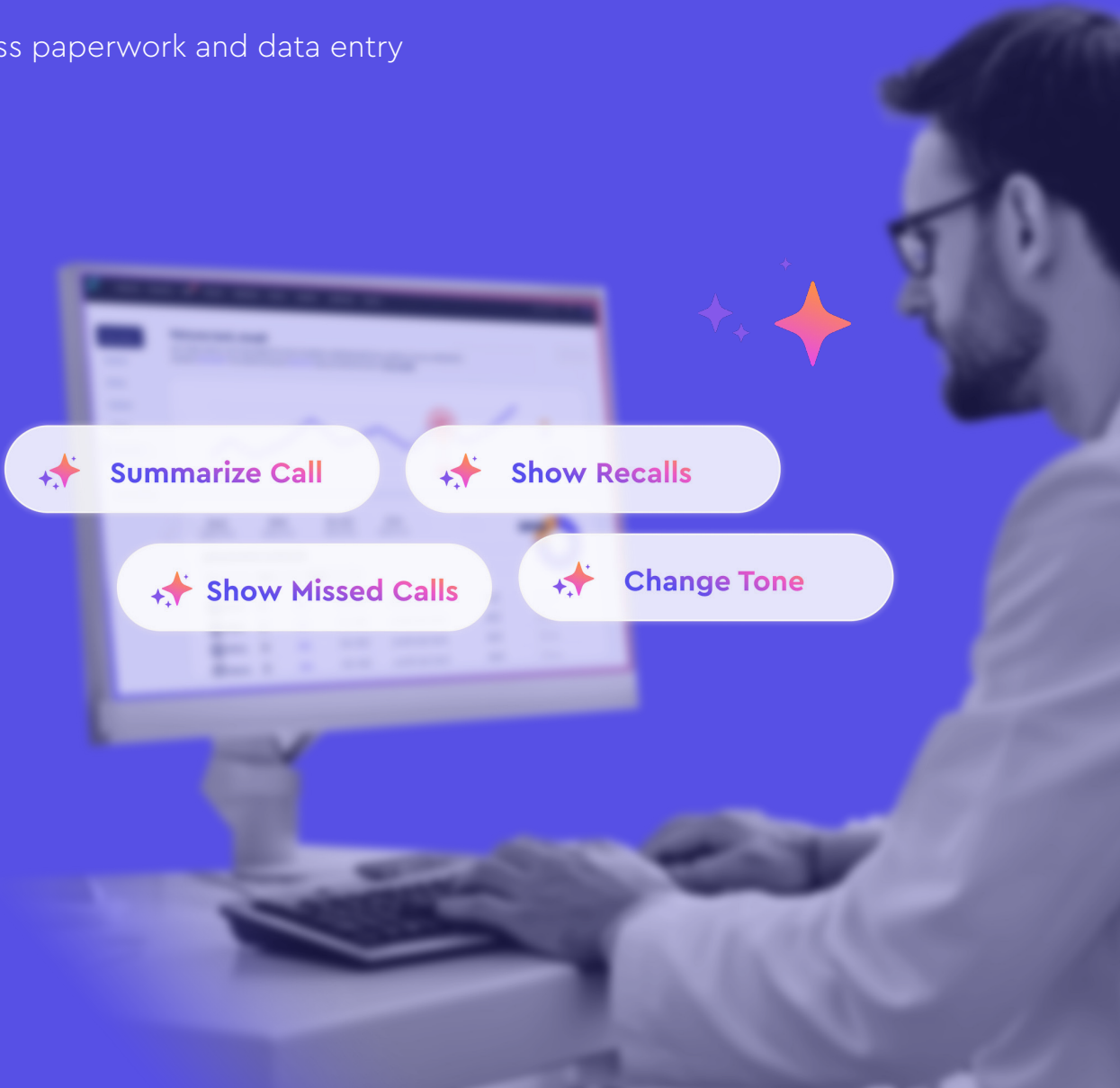


✦ Summarize Call

✦ Show Recalls

✦ Show Missed Calls

✦ Change Tone



How AI Can Help

AI-powered automation can eliminate many repetitive administrative tasks by summarizing complex forms, saving time and preventing mistakes. **AI task management can optimize staff scheduling by reducing the amount of time it takes team members to perform repetitive manual tasks.** Additionally, AI analytics provide real-time insights into office efficiency, helping you make data-driven decisions and improve overall workflow.

What to Do Next

Start by identifying which tasks take up the most time in your daily operations. Are appointment scheduling, patient data entry, and reporting causing bottlenecks? Understanding where inefficiencies exist will help determine how AI can streamline your workflow.

When evaluating AI operations and workflow tools, ask the following questions:

- Integration: Will this tool connect seamlessly with our practice management software?
- Automation Capabilities: Can it handle routine administrative tasks like data entry, appointment scheduling, and task assignments?
- Communications: Does it provide writing assistance for text, emails, and review responses?
- Scalability: Will this tool grow with my practice's needs?
- User Experience: Is the interface easy for my team to use without a steep learning curve?
- Analytics & Optimization: Does it provide actionable insights to help improve efficiency over time?

Once you identify an AI solution that meets your needs, start with small-scale automation—such as summarizing patient intake forms or sorting through patient reviews and helping you respond to the ones that need attention. Monitor improvements in efficiency and gradually expand AI usage to other administrative workflows. The right AI tool will create a more organized and efficient practice while reducing your team's workload.

68% of employees desire their employers to utilize more AI technology, 81% of workers believe that AI improves their work performance.

Source: thesocialshepherd.com



TAKEAWAY: AI-driven workflow automation helps create a more organized, efficient practice while allowing you to focus on higher-value tasks.

#4

AI in Patient Retention & Growth

Your Daily Struggles:

- Struggling to get inactive patients back in the office
- Difficulty in getting patient cancellations rebooked
- Patients delaying treatment recommendations
- Keeping up with online reviews and reputation management



AI Reputation

- Write a Review Response
- Change Tone of Response**
- Summarize Survey Responses



How AI Can Help

AI can enhance patient retention by making it easier to send messages to remind inactive patients to schedule visits. It can also help your team write clear, compelling text and email messages to improve case acceptance and conversion rates. Additionally, **AI-driven reputation management tools can highlight reviews that need attention**, ensuring a strong online presence.

What to Do Next

Assess your patient engagement data. Are you losing patients due to lack of follow-up? Is treatment acceptance lower than expected? Are your online review responses inconsistent? Identifying these gaps will help determine how AI can improve retention and patient loyalty.

When evaluating AI patient retention tools, ask the following questions:

- Integration: Does this tool sync with my existing patient records and engagement platforms?
- Predictive Insights: Does it analyze patient history to anticipate treatment acceptance and engagement?
- Customization: Can it help me write more polished, personalized texts, emails, review responses, and other important messages?
- Reputation Management: Does it help me proactively manage and respond to online reviews?

Once you've identified a tool that meets your needs, implement AI-powered recall and review automation in small phases. Monitor response rates and patient engagement metrics, then fine-tune messaging for better results. AI-driven retention tools

can help you maintain a steady flow of engaged patients while strengthening your practice's online presence.

Final Takeaway:
AI Should Feel Like a Helping Hand, Not a Robot Takeover!

- Introduce AI as a new, helpful tool.
- Get your team involved so they see AI as their new favorite time-saver.
- AI makes it easy to write emails, texts, and review responses that sound professional while being conversational and warm.

Ready to make AI work for YOU?

Start small, keep it fun, and watch how much easier your office runs!



TAKEAWAY: AI-powered patient retention tools help you re-engage lost patients, increase treatment acceptance rates, and strengthen your practice's online reputation.

Closing Thoughts:

AI Makes Every Aspect of Your Job Easier

With AI, you don't have to do it all alone. Whether AI is helping you in crafting the perfect messaging, streamlining billing, optimizing workflows, or improving patient retention, AI is here to make your job easier, not more complicated.

The best part? You don't have to overhaul everything overnight. Start small—add AI to a single workflow, test an AI-powered assistant, or introduce AI-driven messaging. **The more you integrate smart solutions, the more time, energy, and focus you'll gain for what really matters:** a thriving practice, a happy team, and satisfied patients.

AI is the future of practice operations—but it's also the key to a less stressful, more efficient, and more rewarding way to run your practice today.



Want a solution built for high-performing office managers like you?

Practice by Numbers offers a full suite of AI-powered tools that seamlessly enhance scheduling, billing, workflow management, and patient retention. Designed specifically for dental offices, **PbN AI makes your job easier**—so you can focus on running a smooth, stress-free practice.

Learn how AI can lighten your workload.
[Visit PbN AI Solutions](#)





Practice by Numbers (PbN) is an end-to-end software solution for dental practices that eliminates the need for multiple, disconnected tools. This unified platform streamlines scheduling, patient engagement, revenue cycle management, and performance analytics.

PbN helps dental practices reduce no-shows, optimize insurance workflows, and ensure profitability, all from one easy-to-use dashboard. No more jumping between systems, no more guesswork—just smooth, automated workflows that make running a practice easier, faster, and more profitable.

Thousands of dental practices trust PbN to do more with less, save time, and boost revenue—all while delivering an exceptional patient experience. Because when the office runs smoothly, everyone wins.

For more information, visit [PracticeNumbers.com](https://www.PracticeNumbers.com)

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