



GUIDE

How Automated Follow-Ups Increase Case Acceptance

A data-driven look at how specialty practices are recovering lost revenue by automating treatment follow-ups.

The Case Acceptance Problem in Specialty Practices

Every oral surgery and specialty practice faces the same quiet revenue leak: patients who are referred, diagnosed, and presented with a treatment plan but never scheduled. According to the Levin Group, two-thirds of U.S. dental practices see overall acceptance rates between just 20% and 50%, well below the common target of 90%.¹

For specialists, this gap carries an outsized financial impact. According to the American Association of Dental Office Management (AADOM), the average dental practice carries between \$500,000 and \$1 million in diagnosed-but-unscheduled treatment in its system². In specialty settings, where the revenue per case is significantly higher than in general dentistry, even a modest improvement in case conversion can translate into hundreds of thousands of dollars in recovered revenue per year.

What makes this even more pressing is that 82% of dentists cite no-shows and last-minute cancellations as the top barrier to a full schedule, and research suggests that practices retain as few as 41% of new patients beyond their initial visit³.



THE REVENUE AT STAKE

If your practice presents \$2M in treatment annually and your acceptance rate is 35%, you are leaving roughly \$1.3M on the table. Even improving acceptance from 35% to 50% recovers \$300,000 in annual production.

Why Patients Walk Away from Treatment

When patients decline or delay treatment, the reason is rarely clinical. Research consistently points to a mix of communication gaps, logistical friction, and emotional hesitation:



They did not fully understand the treatment or its urgency. Complex procedures, especially in oral surgery, often require more explanation than a single in-office conversation can provide. Patients may leave feeling overwhelmed rather than informed.



Financial concerns need time to resolve. Insurance verification, payment plan questions, and out-of-pocket cost calculations do not happen instantly. Without follow-up, the patient moves on.



Fear and anxiety are powerful barriers. Surgical procedures carry more perceived risk. Patients who need time to process often do not self-initiate the next step.



Life simply gets in the way. A patient who intends to schedule tomorrow forgets by next week. Without a system that re-engages them, the opportunity disappears.

The common thread is not rejection, it is silence. Most practices lose cases not because the patient said no, but because nobody followed up after the patient left the office.



CASE STUDY SILICON VALLEY SURGICAL ARTS (SVSA)

SVSA implemented Intiveo to customize patient communication by appointment type — ensuring that surgical consultations, wisdom teeth extractions, and implant cases each receive tailored follow-up sequences. The practice saw an 83% increase in confirmation rates and saved 2 hours of staff time daily.

A 4-Step Framework for Automated Case Follow-Up



Step 1: Capture every undecided patient automatically

When a patient leaves without scheduling, the window starts closing. Your patient engagement system should automatically flag unscheduled treatment and begin outreach within 24–48 hours. This is especially critical for referral-based practices where the referring GP has already done the work of getting the patient through your door.



Step 2: Deliver multi-touch, multi-channel follow-up

A single reminder is not enough. The data shows that patients who eventually accept often do so after multiple touchpoints, sometimes more than 30 days after their initial visit. Effective sequences can combine text, email, and voice outreach over days and weeks, each message tailored to the procedure type and stage of the patient journey.



Step 3: Make it easy for patients to say 'yes'

Follow-up messages should include direct links to confirm the appointment, and educational content about the procedure. Patients who can review treatment details and book from their phone convert at significantly higher rates.



Step 4: Close the loop with your referring providers

For oral surgery and specialty practices, the referral relationship is your growth engine. Automated follow-up should include status updates to referring GPs so they know when their patient has been seen, when treatment is pending, and when a follow-up is needed. This strengthens the referral relationship and increases future case volume.



CASE STUDY ORAL SURGERY AND IMPLANT SPECIALISTS (OSIS)

OSIS had been using paper forms and the postal service to send and receive referrals. In 12 months with Intiveo, the practice has received 3,966 referrals, seen a 94% treatment completion rate and saved 2 hours per day.

Ready to Recover Your Unscheduled Revenue?

See how Intiveo helps oral surgery and specialty practices automate follow-ups, improve case acceptance, and strengthen referral relationships without adding work to your front desk.

Book a demo at <https://info.intiveo.com/book-meeting>

Want to learn more? Talk to one of our representatives today!



www.intiveo.com



1.855.221.3279

Sources:

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