

Plus  
**10 Free**  
Email  
Templates

# End of Year **CAMPAIGNS** that Actually **WORK!**



# End of Year Campaigns that Actually Work

## Plus 10 Free Email Templates

In dentistry, as in most businesses, there's a rhythm to the year. When Q4 rolls in, the leaves will start to change, and the nights will cool down, but the atmosphere in your practice may start to heat up. The end of the year looms ahead, and there's only a little time left to reach the goals you'd set for the year.

It's crunch time, but the holidays can make December unpredictable, and Thanksgiving can destabilize the end of November. So if you want to squeeze the most out of what's left of the year, what can you do?

You can always temporarily add hours to the schedule. It's not the most popular suggestion, but it usually works, so it's something to keep in mind. But if you'd prefer not to change your hours of operation...

The traditional wisdom is to spin up a few end-of-year marketing campaigns, most of which center around a load of emails/texts/calls to your patient base. Those messages usually have one primary angle – **"You still have insurance benefits. Use them or lose them!"**

At first glance, that's a great angle! It's a wonderful, concrete, relatable incentive for your patients, and the emails practically write themselves. And yet...nobody in dentistry seems to have much enthusiasm about it.

Take a look at the social media groups or forums you're in, and you'll probably see a few threads asking about those "use-it-or-lose-it" end-of-year campaigns. "Does anyone else use these? Do they actually work?"

They can. They should. And with a few tweaks to the standard approach, they will. We just have to fix one big problem, which is actually more like a lot of smaller problems standing on each others' shoulders under a trenchcoat:

Most end-of-year campaigns feel canned, flat, and impersonal. They don't get responses because patients don't feel that their response is required. Patients only see a mass email blast, so they either leave it on read, or brush it off just like the 27 other promotional emails they received that day.

If you want more success with your end-of-year campaigns, the secret ingredient is personalization. You want patients to feel like your messages are directed exactly at them.

With the right filters, you can sort patients into lists that share a common theme.

**So how can we provide that just-for-me feeling without divulging any PHI or spending dozens of hours manually typing each message?**

**In a word, filters.**

With the right filters, you can sort patients into lists that share a common theme. Those lists let you write one message, drop in a few placeholders, and send it to as many patients as you want. And although that might feel like a mass blast to you, it will feel personal to every patient that receives it, *because all those patients need that message.*

**So before you hit send on any mass communication to patients, ask yourself two questions:**

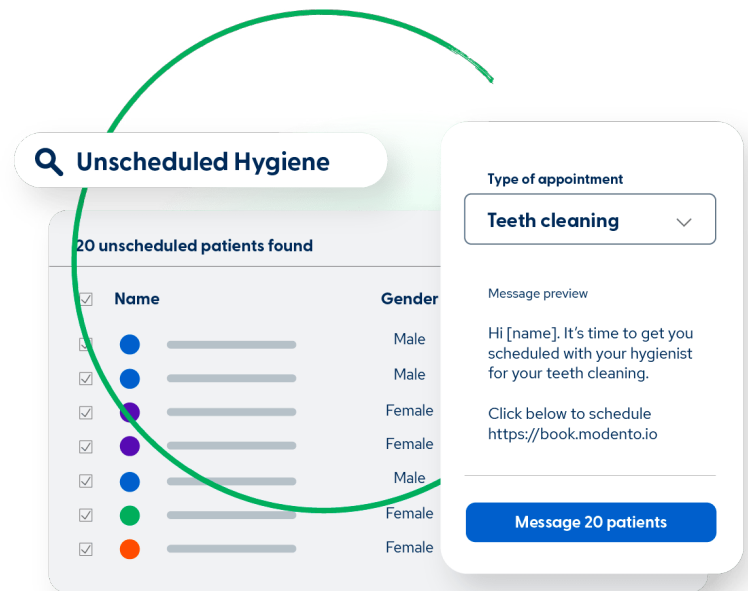
### **1. Am I reaching out to the right patients?**

If you want to fill your schedule with use-it-or-lose-it insurance messages, ensure your emails reach the right targets and as few other people as possible. As we discussed above, filters make that easy. But what filters should you select?

- ***Does this patient actually have insurance \$ remaining?***
  - If not, your email will effectively be spam, so exclude them from your use-it-or-lose-it lists. Instead, follow up with a hygiene reminder, or whatever else might be applicable.
- ***Do they have any unscheduled treatment?***
  - If so, remind them (in a HIPAA-compliant way, of course – see the end section for examples).
- ***Do they have a large amount of unscheduled treatment?***
  - If so, offer financing info and/or options for splitting payment across 2 years.
- ***Do they have a history of on-time payment?***
  - If so, there's value in reaching out to them first, and following up more frequently.

- **Do they have a high treatment acceptance rate?**
  - Same as above
- **Are they likely to hold the appointment and show up for it?**
  - Same as above

If you can confidently answer “yes” to all of the above, you’re either the best employee ever, or [Dental Intelligence Patient Finder is automatically building your outreach lists for you.](#) Either way, congratulations! You’ve found the right audience, and your outreach campaign will be much more successful.



## 2. Can patients schedule directly from your messages?

Put yourself in a patient’s shoes for a second, and ask yourself which of these you’d rather see at the end of a message from your dentist:

*To schedule an appointment, please reply to this email  
or call us at {office number}.*

**Vs.**

**Schedule your appointment now**

One is a chore. The other is a convenient way to check something off your to-do list. Whether the message is an email or a text, patients will choose a one-touch online scheduling button 99% of the time. So if your call to action is still “please call us,” your message could be much, much more powerful.

[The right online scheduling is so much more than just a convenient way to power up your marketing.](#)

- **It allows your patients to schedule fully booked appointments in just a few clicks**

- You can also choose to approve some appointment types manually, if that makes you more comfortable.
    - » Want hygiene to go straight onto the schedule, but require approval for crown appointments? You can do that.
- **It automatically suggests the perfect time slot for that patient, based on their history with your practice**
- **No phone calls required**
  - You stay in complete control of your schedule
  - You choose which appointment times and types are available, as well as operatories, providers, procedures, and more
- **It works with Perfect Day Scheduling, block scheduling, and every other method we've encountered**
- **It completely integrates with patient engagement and communication, so you aren't constantly switching between programs**
- **It notifies patients if they're in-network (this can be disabled if you prefer)**
- **It works in real-time, so it's impossible to double book**
- **You have the option to collect a deposit at the time of booking to ensure patients are committed to their chosen appointment time, especially in those final months of the year when it's difficult to fill last-minute openings or get people rescheduled before Dec. 31st**

***Most importantly, online scheduling turns every point of your online presence into a scheduling opportunity. From your website to your social media interactions, to your emails and texts – if you can put a link in it, you can get appointments from it without lifting a finger.***



You can get a free 2-week trial, including Morning Huddle and Patient Finder just by clicking on this [link!](#) You won't believe how easy it is to fill the schedule when you have the perfect targets for your EOY campaigns.



If you can follow these principles, all your messages will become more effective at filling the schedule no matter what time of year. But if you'd rather steal a few ready-made templates that are especially effective in Q4, go right ahead! Here are a few that should help.

## Steal our emails!

Once you have the right patient lists, sending the right emails for end-of-year engagement is easy! Just steal these and you're good to go.

If you want more, Dental Intelligence has over 100 email templates just like these. There's something for every situation, and plenty of room to write as many of your own as you like.



## “Use-it-or-lose-it” for Patients with Confirmed Remaining Insurance Benefits

### Version 1:

Hi {patient's first name}!

The end of the year is coming up, which means your remaining insurance benefits could be about to expire. It's time to use them before you lose them! When would be a good time for you to come in?

Insert your online scheduling link here.

**[Take a look at our schedule here to pick the appointment time that works best for you!](#)**

Hope to see you soon,

{Doctor name}

{Office contact information}

For “Use-it-or-lose-it” for Patients with Confirmed Remaining Insurance Benefit emails, only send to patients with remaining insurance \$.

Looking for a few other twists? Here are a couple more emails that serve the same purpose. You never know what's going to make someone respond!

## Version 2:

Hi {patient's first name}!

I wanted to take a second to reach out before the end of the year! 2023 is coming soon, which means your remaining insurance benefits may be set to expire. I want to make sure you get some time on our schedule before the holidays make life too crazy.

***You can schedule an appointment directly from this message by clicking here. Just pick the time that's best for you!***

Hope to see you soon,

{Doctor name}

{Office contact information}

## Version 3:

Hi {patient's first name}!

I have some good news and some bad news! The good news is that there's still time to use any remaining insurance benefits you may have for 2022. The bad news is that, in many cases, those benefits disappear if they don't get used before December 31st. But don't worry – there's still plenty of time to use those benefits before you lose them!

***If you want to get the most out of your insurance policy, click here to schedule an appointment.***

Hope to see you soon!

{Doctor name}

{Office contact information}

# EOY “Use-it-or-lose-it” to a Patient with Unscheduled Tx

Hi {patient’s first name}!

I wanted to take a second to reach out about your outstanding treatment before the end of the year! 2023 is coming soon, which means your remaining insurance benefits may be set to expire. If you want to get the most out of your policy, we should set an appointment to take care of your outstanding treatment.

***You can schedule an appointment directly from this message by clicking here. Just pick the time that’s best for you!***

Hope to see you soon,

{Doctor name}

{Office contact information}

“Large” is up to you to define. This is for patients who may want to split treatment across 2 calendar years for insurance purposes. →

# EOY “Use-it-or-lose-it” to a Patient with a Large Amount of Unscheduled Tx

Hi {patient name}!

The end of the year is coming up, which means that the benefits remaining on your insurance policy need to be used before December 31st. That makes this the perfect opportunity to get started on the treatment we discussed at your last visit.

**The good news is that we don’t have to do everything at once!** We can take the first steps now and finish up next year, once your benefits renew.

***Click here to schedule an appointment to get started on your treatment.***

We also have many easy financing options to make sure you get the care you need in the way that makes the most sense for you. We’re happy to answer any questions you may have about this, or anything else.



Hope to see you soon,

{Doctor name}

{Office contact information}

## EOY Patient Due for Hygiene with Remaining Insurance Benefits

Hi {patient name}!

I wanted to reach out to remind you to schedule your next hygiene appointment before the end of the year. Your insurance benefits may reset on January 1st, which makes now a perfect time to use those benefits before you lose them! What time would work best for you?

***Just click here to take a look at our schedule and pick your favorite appointment time.***

Looking forward to seeing you before the end of the year,

{Doctor name}

{Office contact information}

## EOY Email for HSA patients

Hi {patient name}!

Did you know that HSAs often cover elective procedures, like whitening, mouth guards, and anti-snoring devices? If you've been thinking about any of those, you're in luck – they're a great way to use up excess HSA funds!

If you've been interested in services like these and want to make the most of your HSA funds, now is a great time to schedule a consultation! ***Just take a look at our availability here and pick the appointment time that works best for you!***

Hope to see you soon,

{Doctor name}

{Office contact information}

## EOY Email for FSA Patients

Hi {patient name}!

Are you using a Flexible Spending Account (FSA)? With the end of the year approaching, it may be time to use those funds. Let's get your next appointment scheduled so you don't lose out on any of your benefits!

**[Take a look at our schedule here to pick the appointment time that works best for you!](#)**

Hope to see you soon,

{Doctor name}

{Office contact information}

## EOY Email to Send During Open Enrollment Season (November)

Hi {patient name}!

It's open enrollment season again, which means many of our patients have changes in their insurance policies. We're just checking in to make sure our records stay up-to-date. Has anything changed with your insurance?

If it has, **[click here](#)** to make your updates so we can save some time next time we see you!

Either way, your next appointment is just a click away. **[Take a look at our schedule here to pick the appointment time that works best for you!](#)**

Using Dental Intelligence for your Digital Forms? Insert your Patient Portal link here so they can easily make quick updates between appointments. →

Hope to see you soon,

{Doctor name}

{Office contact information}

## EOY Email for Patients Enrolled in an In-house Membership Plan

Hi {patient name}!

As the year comes to a close, we want to remind you that you still have some membership benefits remaining. When can we see you to make sure you get the most out of your membership?

***Just click here to pick the appointment time that works best for you!***

Hope to see you soon,

{Doctor name}

{Office contact information}



Don't forget that you can get a **FREE 2-WEEK TRIAL** of Patient Finder and Morning Huddle just by clicking [here](#). It's the perfect way to supercharge your EOY campaigns!

# What do practices think of Dental Intelligence?



"We had 24 patients schedule with us through Online Scheduling in September!! For a smaller, newer office like ours, that's almost TEN PERCENT of all of our patients in one month scheduling through Online Scheduling. We love telling patients that they can schedule with us 'just like OpenTable for a restaurant' and we're so happy with the addition of Online Scheduling!!!"

**Dr. Clifford Moore - Moore Dental**



"In the first few weeks of being a customer of Dental Intel and before we had even been fully trained, we were able to use the Patient Finder to schedule more than \$15,000 just in Hygiene Recare alone! We were so stoked to see how we could find the patients we wanted to schedule so quickly!"

**Scott Beard - Newton Dental Associates**



"This system is THE system of ALL systems! Where have you been all our lives!"

**Amy - Kids First Pediatric Dentistry**