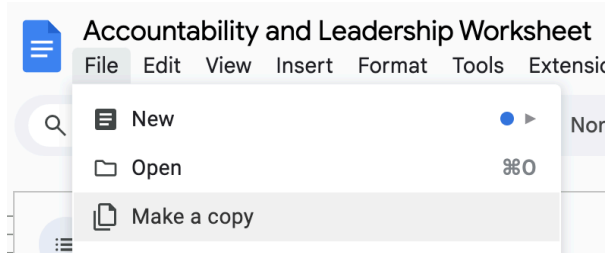


PATIENT COMMUNICATION PLAN BUILDER ACTIVITY

This document is set to **View Only**, so you'll need to make your own copy:

1. In the top menu, click **File > Make a copy**.



2. Rename the file something like:
"My Accountability Chart - [Your Practice Name]"
 3. Save it in your Google Drive or download it as a Word Doc if you prefer working offline.
-

Objective:

Evaluate your current communication systems, identify opportunities for personalization and automation, and create a clear plan using EOS tools to support execution and accountability.

Step 1: Audit Your Current Communication Channels

List all the channels you currently use to communicate with patients. Then assess their effectiveness:

Channel	Used? (✓)	Who Manages It?	Is It Automated?	Patient Response/Effectiveness
Phone calls				
Email				
Text/SMS				
Patient portal				
Social media				
Print/mail				

✓ *Where are the gaps? What feels clunky, inconsistent, or outdated?*

Step 2: Identify Patient Segments & Opportunities to Personalize

List at least 3 patient segments you commonly work with. What do they need to hear—and how?

Segment	Communication Needs	Preferred Channel(s)	Messaging Ideas
New Patients			
Returning Patients			
Overdue or Inactive Patients			

Step 3: Highlight Automatable Steps in the Patient Journey

Use this table to identify communication touchpoints that could be automated using tools like Open Dental, Weave, Lighthouse 360, etc.

Step in Journey	Manual or Automated?	Tool You Use or Need	Personalization Ideas
Appointment Confirmation			
Reminder Message			
Post-Visit Thank You			
Review Request			
Recare/Recall			

Step 4: Create Your Quarterly Rock

Based on what you uncovered above, define one focused, strategic communication Rock for this quarter:

My Rock:

Why It Matters (Connection to Vision/Experience):

Step 5: Build Your To-Dos & Surface Your Issues

✓ Break your Rock into weekly To-Dos you can track in your L10 Meeting.

To-Do Item	Due Date	Owner

🚩 Document any Issues to bring to your next team meeting:

Issue	Notes

Step 6: Define KPIs for Your Scorecard

Choose 2–3 communication metrics to track weekly on your Scorecard:

- ☐ % of appointments confirmed
- ☐ Email open/click rate
- ☐ Number of 5-star reviews
- ☐ SMS response rate
- ☐ # of overdue patients reactivated
- ☐ Other: _____

Your Communication KPIs:

1. _____
2. _____
3. _____

Wrap-Up

This plan isn't about doing more—it's about doing communication **better**.

Use it to create consistency, reduce manual work, and increase patient satisfaction.

Once you've completed the worksheet, keep it accessible and review your progress weekly in your L10. Communication isn't just a system—it's part of your **brand, culture, and retention strategy**.