



## Smile Choice Event Guide

Typically pending patients are in the system for about 8 weeks and it's noted that after that time they likely won't start. That means there's a long list of inactive patients in your practice management system just waiting for a new reason to start treatment! After all, they made the effort to come into your office at some point, so you know they want to do something to enhance their smile. When you hold a Smile Choice event, we have found that announcing My Smile Choice™ to all adults who never started has generated quite a few new starts!

The first event should be on a specific date/time to allow back-to-back consults/starts. This helps the practice integrate My Smile Choice™ into the normal flow, as repetition helps establish comfort with the new program. We recommend this event be done, initially, to all past consults of record. It can then be held every 6 months.

**IMPORTANT:** While the Smile Choice events are focused on past consult recovery, they are open to any potential patients who are looking to enhance their smile.

### Let's plan your first event:

1. Determine key team members who will coordinate the event and email/text out invitations. Schedule a meeting with the team and read through this guide prior to the meeting.
2. Determine the date/time of your event. The event should be scheduled at least 6 weeks out, to give adequate time to plan & promote it.
  - Most offices set aside a minimum of 3 hours for the event.
  - Don't forget to take holidays, vacations, etc into consideration!
  - Tuesday, Wednesday or Thursday evenings from 4-7pm have seen the best results. Certainly you can play with the days/times if you aren't able to work within these recommended hours. But ask your team, you might be surprised at their willingness to rearrange their day to help out the practice!

**TIP:** If the office is especially busy, setting time aside on a non-production or admin day can help.



3. Pull a list of all emails & phone numbers of all past adult consults who never started treatment. It's okay if there is only one point of contact, as the practice will be sending out both emails and texts to cover all bases.
4. Customize the suggested copy for your emails & texts (*provided on the last page*). Remember to keep the message simple with your primary goal being to drive the readers to your My Smile Choice™ micro-site and/or call your practice.
5. Test & send your emails/texts. Always **test** the first email or text sent. Send it to another team member, check it both on a PC/laptop and phone. Make sure links work and formatting looks appropriate.

**TEXT TIP:** We recommend both texting and emailing everyone who's contact information you have. If you are going to choose one over the other, texting gets significantly more responses.

**EMAIL TIP:** If you pay for an emailing platform (e.g. Constant Contact), then you can send all the emails at once. But if you plan to send the email through your everyday business email and blind carbon copy (Bcc) everyone, then you'll want to send them in batches of around 10 people at a time. If you send mass emails to hundreds of people at once from your everyday email, the platform will see it as spam and send the email to the recipients' junk folders.

### How to schedule your event:

- ★ You will want to schedule your consults about 30 min apart. Therefore, the 3 hours set aside will result in 6 consult slots.
- ★ To set proper expectations, the patient will be in your office for about an hour.
- ★ The flow of the consult would look similar to this:



\* Many of these patients have been to your office before. So you may already have paperwork and a scan and might be able to skip these steps.

**NOTE:** This event is structured similarly to what Align Technology calls an "Invisalign Day". If you would like in-person help planning your event, your Invisalign rep should be willing.



- ★ When a person contacts you to schedule their consult, try your best to book the event from start to finish. That way, if your event is planned after work hours, you can leave early if it doesn't fill up.
- ★ If someone isn't able to attend on the date of the event just put them into your regular schedule.
- ★ If you've completely filled your event, you can add people to your regular schedule.

**CONVERSATION EXAMPLE:** *"We've had an overwhelming response for the event! Let's get you in as soon as possible. Would you be available on [DATE] or [DATE]?"*

### Event Day (Make it Special):

- ★ Decorating the reception area with balloons, streamers or whatever you can find that will make it fun.
- ★ Put out some refreshments if it's scheduled over lunch or around dinner time.
- ★ Designate a spot to take some selfies or photos of the team & patients for your social media. You could even make or buy some signs that patients can hold for the photos!
- ★ The idea is to get creative and enjoy a day of starts!

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### Future Events:

We recommend reaching out twice a year to recover anyone who hasn't started treatment in the last 6 months. For these events, you can hold an event just like the first one or you can simply put patients into your regular schedule.

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### TEXT & EMAIL COPY NOTES:

Copy and paste the copy (*provided on the last page*) to send to past consults that haven't started yet. If you have to send one at a time, it would be best to customize each one with the patient's name. They'll be much more apt to read it in full that way. Customize the message first, so that when you copy and paste it, the patient's name should be the only part that needs individual editing. Test all content on yourself or a team member before sending it to potential patients. Lastly, you'll want to always double check that the person's name was edited properly before sending it. It's easy to lose track when doing a lot of these one at a time.



## Text & Email Copy

### Instructions:

1. Copy & paste the verbiage below to a Word or Google Document.
  2. Customize it with your name, practice name, phone number and custom My Smile Choice™ micro-site link.
  3. Copy & paste it to the text or email you'll be sending.
  4. Customize it to display the recipient's name if you are able. If you cannot do this, then use a generalized greeting.
  5. Test the first email/text you send for formatting, proper links, etc.
  6. If it looks good, send it out!
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### Text:

"Hi [NAME]! This is [DOCTOR] from [PRACTICE NAME]. When you came in for an Invisalign consult, [I or we] got the sense that the treatment was more involved and costly than you were hoping for. [I or we] thought of you because we have a NEW program that lets you choose the level of Invisalign treatment you want with prices to match! I want to personally invite you to a SPECIAL EVENT on [DAY, DATE from TIME] where we'll be doing free smile simulations of what your smile could look like! We only have 10 spots available. Call [OFFICE PHONE NUMBER] if you'd like to reserve a spot!  
[\[add link to your micro-site\]](#)"

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### Email:

Hi [NAME]!

*When you came in for an Invisalign consult, [I or we] got the sense that the treatment was more involved and costly than you were hoping for. [I or we] thought of you because we have a NEW program that lets you choose the level of Invisalign treatment you want with prices to match! Check out the link below.*

*[I or we] want to personally invite you to a SPECIAL EVENT on [DAY, DATE from TIME] where we'll be doing free 3D simulations of what your smile could look like!*

*If you are at all interested, call/text us at XXX-XXX-XXXX & we'll schedule you for a FREE smile simulation.*

[\[add link to your micro-site\]](#)

Sincerely,  
[PRACTICE NAME or DOCTOR]

PS. We are trying to get the word out to the community about our new clear aligner program. If you could please forward this email to any family, friends, co-workers and anyone you know who has ever expressed interest in potentially enhancing their smile, we would so appreciate it!"