

A decorative graphic on the left side of the image consisting of several parallel diagonal stripes. The stripes alternate between a bright yellow color and a black color, creating a high-contrast, energetic pattern.

Welcome to

bright
REFERRAL

Kickoff Meeting Agenda

- ONE
 - Introductions + expectations
- TWO
 - Onboarding goals
 - Referral source categories + roll-out plans
 - Bright Cards
 - Your account set-up
- THREE
 - Next Steps

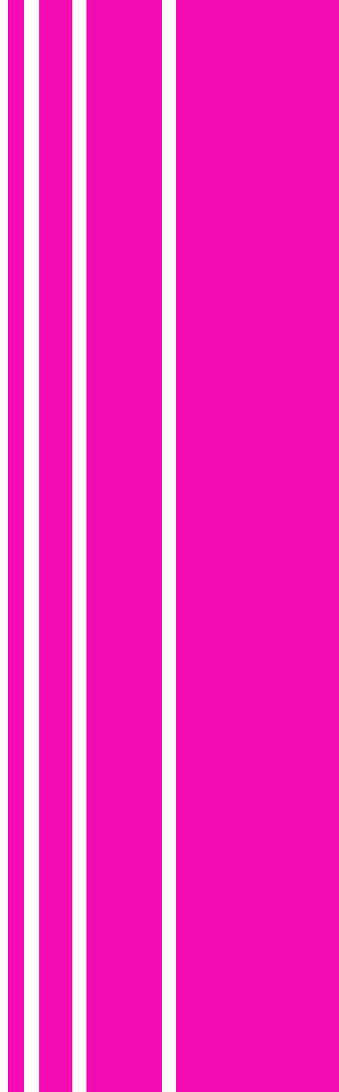


Introductions +
Onboarding plans

1

A Bright Referral Champion is the go-to person for anything Bright Referral.

**Who is the BRC
at your office?**



The Bright Referral Champion:

- Maintains the Bright Referral dashboard
- Helps train referral sources
- Follows up with referral sources to reinforce training
- Is the point of contact in practice for all things Bright Referral

Who is your BRC?

Now that that's
settled, let's review the
3-part onboarding plan.

Onboarding Plan

Step 1: Get ready

THIS IS TODAY

- Determine the BRC
- Set the onboarding goal
- Review roll-out best practices and resources
- Confirm your account set-up & dashboard know-how

Step 2: Get set

WE'LL SCHEDULE THIS TODAY

- Goal progress check & dashboard review
- Roll-out support
- Referral strategy prep

Step 3: Go

THIS IS THE FINAL MEETING

- Onboarding goal + dashboard review
- Set strategy and goals for next 3 months*
- Onboarding survey
- Referral incentive
- Continued support resources

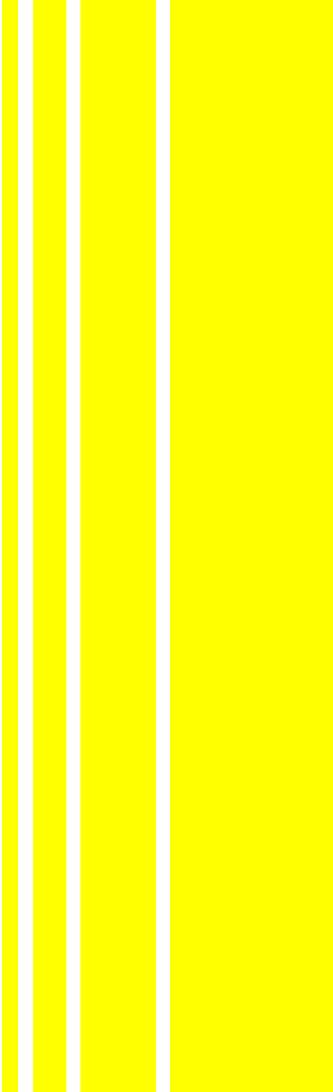
*Practice decision makers should be at this meeting.



Onboarding goals,
Roll-out plans and
Bright cards

2

Onboarding goals



ONBOARDING GOALS

3

Referral sources
categories

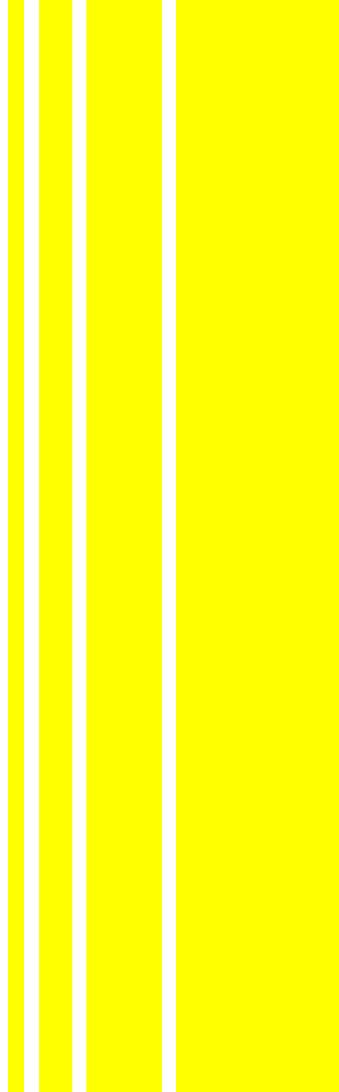
3

GP or referring
practices live

3+

Referrals sent from
each source

How do we accomplish
this goal?



First, we decide which types of referral sources to start with.

Referral Source Types

Doctors/Practices ✓

- Offices that already refer to you
- Offices that you want to refer to you

Patients ✓

- Current patients
- Former patients

Team Members/Staff ✓

- Each team member
- Groups of team members

Events

- Festivals
- Lectures
- Sponsorships
- School visits

Community

- PTA members
- Local business association members
- Salon and spa staff

Other

- Marketing
- Social
- Get creative!



Most common referral source categories to start with

Second, we learn how to encourage each type of referral source to use Bright Referral.

Referral Source Best Practices & Support

Doctors/Practices

- Call to ask questions
- Schedule lunch & learns
- [Support + Resources >](#)

Patients

- Use digital referral cards
- Scripting during treatment and at debond
- [Support + Resources >](#)

Team Members/Staff

- Incentivize referrals
- [Support + Resources >](#)

Events

- Tailor for each event goal and audience
- Set goals
- [Support + Resources >](#)

Community

- Create mutually beneficial business relationships.
- Foster a community
- [Support + Resources >](#)

Other

- Use QR codes
- Track the previously untrackable; add ROI
- [Support + Resources >](#)

Third, we start with referring practices because they are the *MOST** valuable referral source.

*The average practice gets between 40-60% of patients from referring docs. Bright Referral leads from GP offices convert to patients 25%

We encourage following a structured training plan with lots of follow-up. Because consistency makes a habit. .

Referral Source	Call to Schedule	Lunch & Learn	Thank You Email	Week 1 FOLLOW UP CALL	Week 2 FOLLOW UP EMAIL	Week 3 FOLLOW UP CALL	Week 4 FOLLOW UP EMAIL
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[Check out our script for this phone call >.](#)

Remember to ask questions about their existing referral process so you can better position Bright Referral as a WIN for their process. Not just a win for you.

We Recommend Lunch & Learns for Practices

Duration:

30 Minutes

Attendees:

- Doctor
- Bright Referral Champion
- Referring Doctor
- Referring Doctor's Team

Ask how many chairs in clinic

How Many Cards Should I Bring?

- 1 per chair/operatory
- 2-3 at front desk
- 1 per doctor

How to present:

- Focus on solutions it provides THEM (easy, fast, better experience, automatic records)
- Pretend they are the patients
- Let them practice
- Plan for follow-up

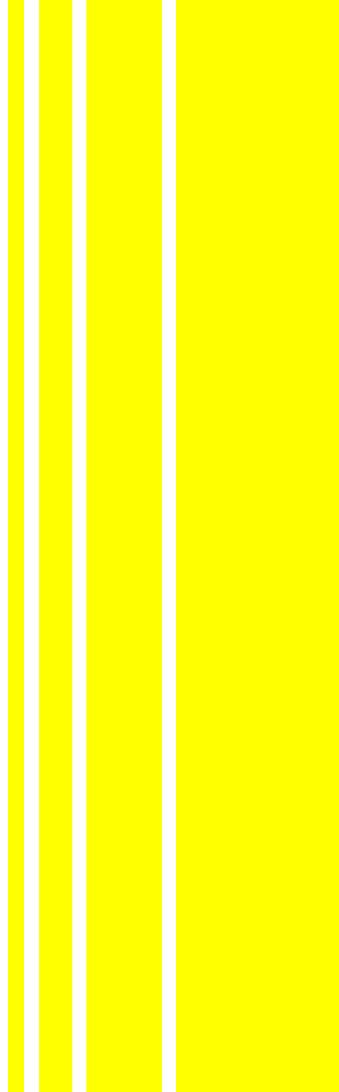
Why train this way?

Everyone needs a chance to try new things. Being in person and giving everyone the experience reinforces how easy it is and encourages use.

Referral Source	Call to Schedule	Lunch & Learn	Thank You Email	Week 1 FOLLOW UP CALL	Week 2 FOLLOW UP EMAIL	Week 3 FOLLOW UP CALL	Week 4 FOLLOW UP EMAIL
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Scripts and resources for all of these follow-ups [can be found by clicking here >](#).

Fourth, we remember
how to connect and use
Bright Cards.



Bright Cards Process

1. Publish Referral Source

Visit Referral Source page in dashboard

Click Edit on the referral source

Click Publish

2. Download iPhone App

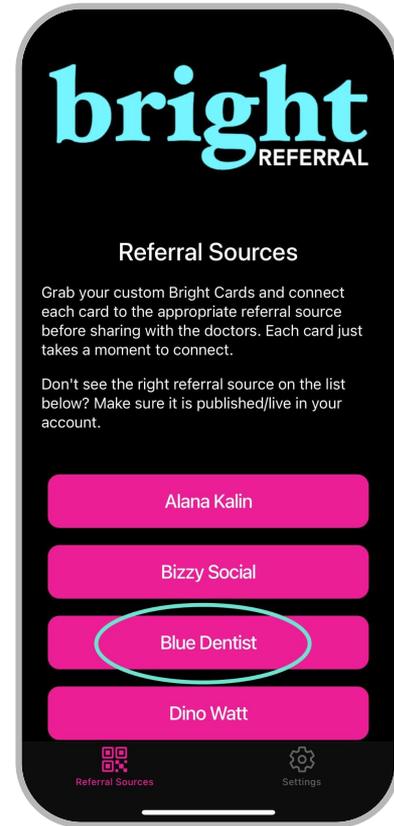
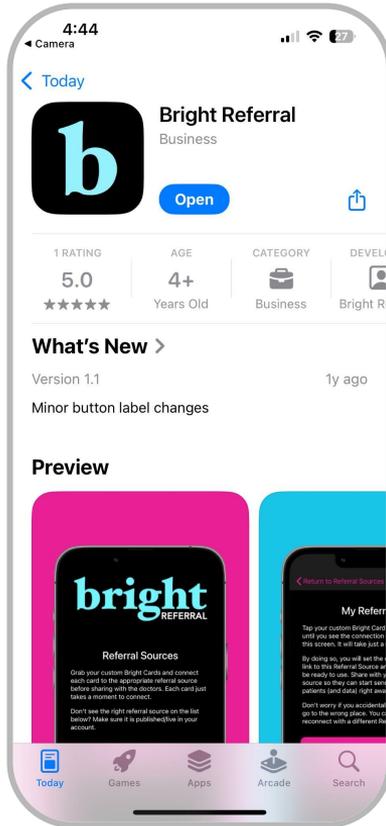


3. Activate Bright Card(s)

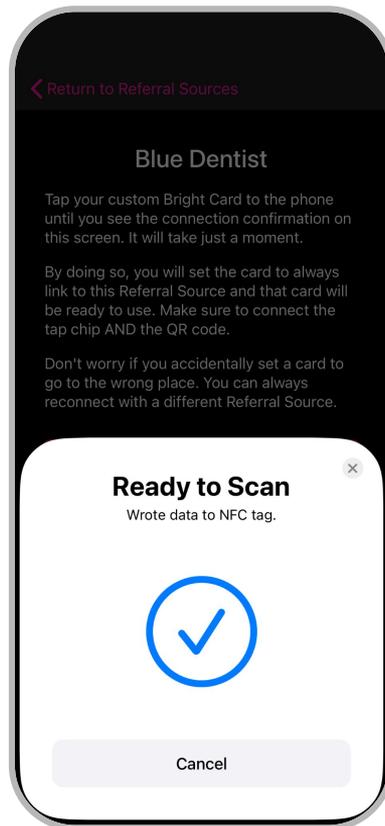
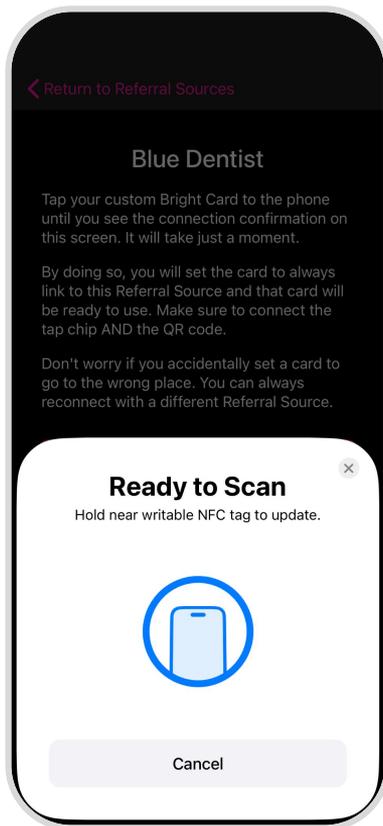
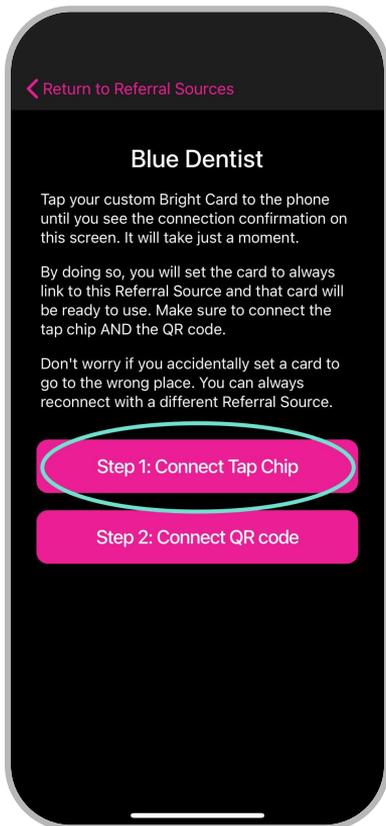
Follow steps in app

Connect the chip AND the back-up QR code

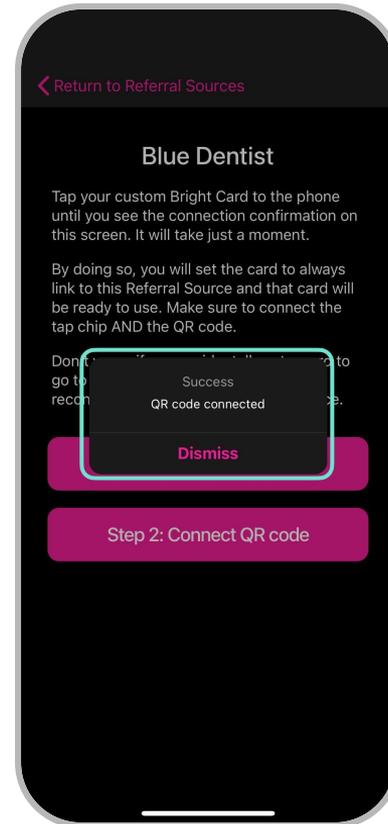
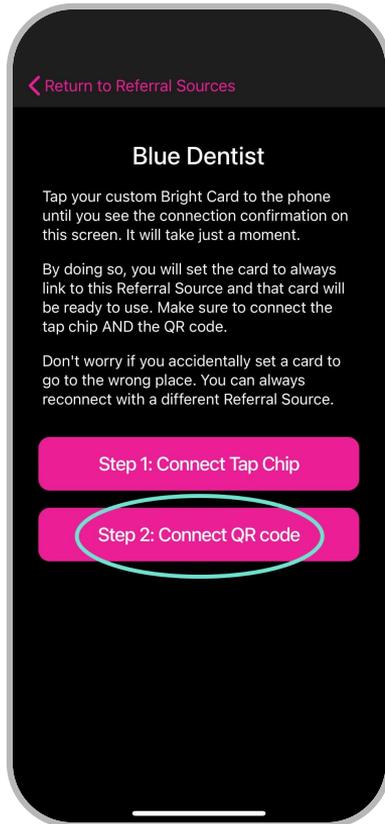
Download the app



Connect the NFC chip



Connect the QR code



Need help with tapping?

- For iPhones, tap the card to the front, top of the phone.
- For Androids, tap the card to the back, middle of the phone.
- If you have trouble, have the patient scan the QR code with their camera.

All smart phones manufactured 2017 or later can “tap”. But, the QR code is there just in case.

Fifth, we confirm your
account is set-up
properly and ready to go.

[Go >](#)



Next steps

3

Next Steps

1. Remember, we are working towards your onboarding goal - 3 referral source types, 3 referring practices, 3 referrals from every source
2. Schedule 30 minute lunch & learns with your referring offices ASAP
3. Start rolling out one other type of referral source
4. Schedule our next check-in meeting in 4 weeks for 45 minutes

On our next call:

- We'll review your progress toward the onboarding goal
- Provide more support and resources for roll-out and dashboard management
- Start thinking about Bright Referral goals after onboarding

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THANK YOU!

bright
REFERRAL