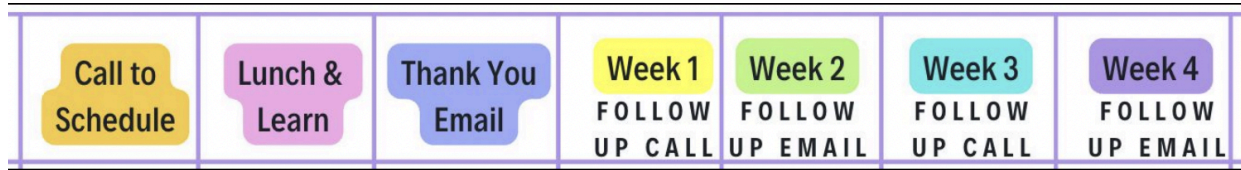




## How to Train Referring Offices: Templates and Scripts

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Included in this document

- [General recommendations](#)
- [Call to Discover](#)
- [Email to Discover/Gauge Interest](#)
- [Email to Schedule Lunch and Learn](#)
- [Phone call to schedule lunch and learn](#)
- [After lunch and learn thank you email](#)
- [1 week after roll-out phone call](#)
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- [4 weeks after roll-out email](#)

## General recommendations

1. Position Bright Referral as a solution for THEM, not for you. It's faster, easier, more efficient, provides better records, and improves patent follow-through.
2. Provide each office with enough Bright Cards to put one card in every treatment room/chair, a few at the front desk, and one with each doctor.
3. When onboarding, try to get the ENTIRE team in the room. Just training the doctor or the office manager only goes so far. It makes a big difference for everyone to see, learn and try together.
4. Consider incentivizing use for the first month after roll-out. Just something to encourage trial so they get used to using the Bright Cards.
5. Talk to them about how seamlessly this slips into their existing process. Instead of reaching for a referral pad, they now reach for a Bright Card.



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6. Don't be afraid to follow-up early and often and call to say thank you when they make a referral. Positive feedback goes a long way, especially in the early stages of adoption.

### Call to Discover\*

Hi There! It's so great to talk with you.

We are always just so grateful for all of the referrals you guys send our way and I realized that I've never actually asked about your referral process. Can you tell me step by step, what that process is like? Do you use paper referral pads? Where do you keep them? Do you refer to a lot of different practices? Who from your team does the referring? When in the appointment do you do the referral? Do you like to add a referral record to your files? How do you capture that record? Do you track if a patient starts treatment? What else is important to you in the referral process? Does everyone on your team follow the same process?

\*The point of this phone call is to learn about the inefficiencies or deficiencies of their current process. This allows you to position Bright Referral as a win when you go in for a lunch and learn.

### Email to Discover/Gauge Interest

Hey Dr. \_\_\_\_\_,

I found a company that helps with the process of referring patients.

Essentially, we would provide you with special cards that you would tap on patient's phones, and it would initiate the process so it's faster, easier, etc.

[Here's a video about it.](#)

It seems like a cool way to streamline the process and wondered if you would want to give it a try? Let us know what you think!



## Email to Schedule Lunch and Learn

Hi \_\_\_\_\_,

I hope this email finds you well. We have some new and exciting things happening at our practice and we'd love to tell you and the team all about it. Namely, based on our conversation last week about your referral process, a new way to refer patients that will make your process much easier and your patients very impressed. Plus, it helps increase the rate that patients actually follow through with the treatment they need which is amazing for their care.

Can we schedule a lunch for the entire team sometime in the next few weeks? We'll come to you, of course, and I'll make sure we bring enough food (and cool things to talk about) for everyone to enjoy. Please let me know a good day and time.

Thanks and hope to talk soon.

## Phone Call to Schedule Lunch and Learn

Hi There! It's so great to talk with you.

We are always just so grateful for all of the referrals you guys send our way and I don't think we can ever reach out enough to say thank you. So thank you!

I'm actually calling to talk about the referral process. After our conversation last week about your process we did some research and found a great system that can really improve things.

It makes the process so much easier and faster for you, gives your patients a way better experience, and helps patients actually follow-through with the care they need. Basically a win for everyone.

I'd love to schedule some time with your entire team to tell you all about it. I'm happy to bring lunch for everyone and promise it won't take more than 20-30 minutes. When would be a good day and time?



## Thank you email

Hi \_\_\_\_\_,

Thank you so much for your team's time and attention today! Now that you've had some time to digest everything we spoke about, please reach out with any questions. Our hope is that Bright Referral saves your team valuable time, eases your process, improves the patient experience and gives everyone more accountability in the process. It seemed like it was received really positively so hopefully that's a good sign. Let me know if you have any questions as your team gives it a try.

Thanks so much!

## One Week After Roll-Out Phone Call

Hi There!

Just checking in after our onboarding last week.

I've seen \_\_\_\_\_ referrals come in which is so exciting. Thank you! So tell me, how are things going? What are you hearing?

We're really eager to help Bright Referral work for your entire team, so please don't hesitate to reach out with questions. We've seen it integrated really seamlessly in other practices so I know it can be the same for your office.

Any initial thoughts or feedback? Maybe from the doctor or assistants or front desk staff?

Seriously - don't hesitate to call with questions. We're happy to help. Thank you guys so much for trying something new. I know it can be great.



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## Two Weeks After Roll-Out Email

***(tapering referrals)***

Hi There!

It's been 2 weeks since we've started with Bright Referral!

Based on the data we're seeing, it looks like you guys started off really using the Bright Cards, but things have tapered off a bit. I'd love to understand how this process is working in your office and what could be helpful to get everyone super comfortable.

Can I give you a call today to chat about it?

Thanks so much!

***(strong referrals)***

Hi There!

It's been 2 weeks since we've started with Bright Referral!

Based on the data we're seeing, you guys are rocking it! No surprise there. :-) But seriously, I'm so glad things are going well. Can you tell me what the office staff has been saying? Or anything about how it has integrated into your practice processes? I'd love to share any insights you have with other offices.

Thanks so much!

## Three Weeks After Roll-Out Phone Call

Hi! So good to talk with you.

I'm just calling to check in to see how it's going with Bright Referral. I know trying a new process is a big deal so I just want to learn about your experience -what's working, what we can help



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with, etc. Based on the data we're seeing, \_\_\_\_\_  
\_\_\_\_\_.

Let me know anything we can do to continue to support your team as they get used to the tap. Hopefully you are starting to see the time savings and the follow-through with patients. Anything else we can do to help things from our side? What about referral records. Is that working for you and the team?

## Four Weeks After Roll-Out Email

Hi \_\_\_\_\_,

Can you believe it's been a month since we started with Bright Referral!?!

Now that you have a few weeks under your belt I just want to make sure the habit is taking route and things are still feeling good. How is it fitting in your process? Still seeing the time savings benefit?

Don't be a stranger - please reach out with any questions or if anyone on your team needs a re-training. We're happy to jump on a call or stop by.

Thanks again for being such a great partner! We love continuing to innovate and finding cool new ways to improve our process and the patient experience.