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General recommendations

1. 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.
2. 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.
3. Consider incentivizing use for the first month after roll-out. Just something to encourage trial so they get used to using the Bright Cards.
4. 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.
5. 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.



Introduction Email

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, 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.

Introduction Phone Call

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. We are starting something new and pretty cool in our office to help manage and track referrals.

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

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?



Referring Offices: Templates and Scripts

One Week After Roll-Out Email

Hi _____,

Just checking in after our onboarding last week. How are things going? I've seen _____ referrals come in which is so exciting. Thank you!

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.

Please let me know - big or small - if you want to review any of the details, or practice referring, or have any questions at all. Happy to talk it through and help!

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.

Thank you so much for sharing all of this. It's really helpful and I'm glad we can talk through how to integrate it into your office processes.

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.



Referring Offices: Templates and Scripts

One Month After Roll-Out Email

(tapering referrals)

Hi There!

Can you believe it's been a month 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!

Can you believe it's been a month 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!

One Month After Roll-Out Phone Call

(tapering referrals)

Hi! So good to talk with you.

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

I'm just calling to talk about how it's been going. 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.

What are you seeing or hearing from the team?



Referring Offices: Templates and Scripts

(strong referrals)

Hi! So good to talk with you!

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

I'm just calling to talk about how it's been going. Based on the data we're seeing, you guys are rocking it! No surprise there, of course.

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.