

# PC ADMIN

## HUBSPOT

- CRM tool
- Used daily to track patients
- Source of truth for tracking conversion

## DAILY REPORTING SPREADSHEET

- Tracking of revenue and forecast for assigned clinicians
- Accountability for ensuring clinicians are going to hit revenue and there books are optimised and productive

## AIRCALL

- Patient communication via SMS or Phone Call

## EMAILS (GMAIL)

- Patient communication via Email

# HUBSPOT

## FINDING PATIENT CONTACT IN CONTACTS

The screenshot displays the HubSpot interface for the 'Contacts' section. The top navigation bar includes 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', and 'Reports'. The main content area shows a list of 'Unassigned contacts' with columns for 'EMAIL', 'PHONE NUMBER', 'LEAD STATUS', 'CREATE DATE (GMT+9:30)', and 'CONTACT OWNER'. A sidebar on the left contains navigation options like 'My Contacts', 'Calls', 'Target Accounts', 'Activity Feed', and 'Lists'. The contact list includes entries for Igshaan Woods, Julie Gallaher, Hannah Tarrant, Sam Taylor, Henry, Justin Heath, Kerrie Stubblety, Jack Woodruff, Olivia Postlethwaite, Chloe Tu, and Vera.

	EMAIL	PHONE NUMBER	LEAD STATUS	CREATE DATE (GMT+9:30)	CONTACT OWNER
<input type="checkbox"/>	mariaahcastellanos@gmail...	+61 421 047 184	--	Today at 4:42 PM	Astrida Birzuils (astrida@dentalboutique.co...
<input type="checkbox"/>	iggywoods4@gmail.com	+61 414 348 923	--	Today at 4:40 PM	Dimitri Angelou (dimitri@dentalboutique.co...
<input type="checkbox"/>	julie.gallaher75@gmail.com	+61 043 283 6869	--	Today at 4:24 PM	Unassigned
<input type="checkbox"/>	han_gray@hotmail.com	+61 415 557 406	--	Today at 3:46 PM	Unassigned
<input type="checkbox"/>	oope1234@gmail.com	+61 045 795 4534	--	Today at 3:31 PM	Unassigned
<input type="checkbox"/>	henry.gong1995@gmail.com	+61 435 274 422	--	Today at 3:28 PM	Unassigned
<input type="checkbox"/>	justinheath@live.co.uk	+61 466 228 119	--	Today at 3:26 PM	Joel Collins (joel@dentalboutique.com.au)
<input type="checkbox"/>	kerriestubblety@yahoo.co...	+61 043 392 0024	--	Today at 3:23 PM	Unassigned
<input type="checkbox"/>	j.woodruff@difaustralia.com	+61 481 949 617	--	Today at 3:19 PM	Unassigned
<input type="checkbox"/>	livpos@hotmail.com	+61 475 730 916	--	Today at 3:07 PM	Unassigned
<input type="checkbox"/>	tuchloe95@gmail.com	+61 469 580 478	--	Today at 2:58 PM	Jessica Caligiore (jess@dentalboutique.com...
<input type="checkbox"/>	verael223@gmail.com	+61	--	Today at 2:57 PM	Karina Cheng (karina@dentalboutique.com...

# HUBSPOT

## FIND PATIENT CONTACT - VIA DEALS

Deals 1,088 records PC - Brisbane Actions Import Create deal

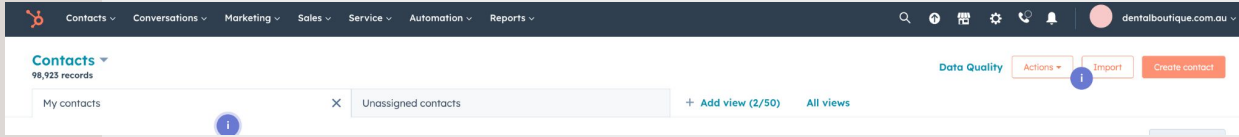
My deals All deals + Add view (2/50) All views

Deal owner - Create date - Last activity date - Close date - Advanced filters (0) Save view

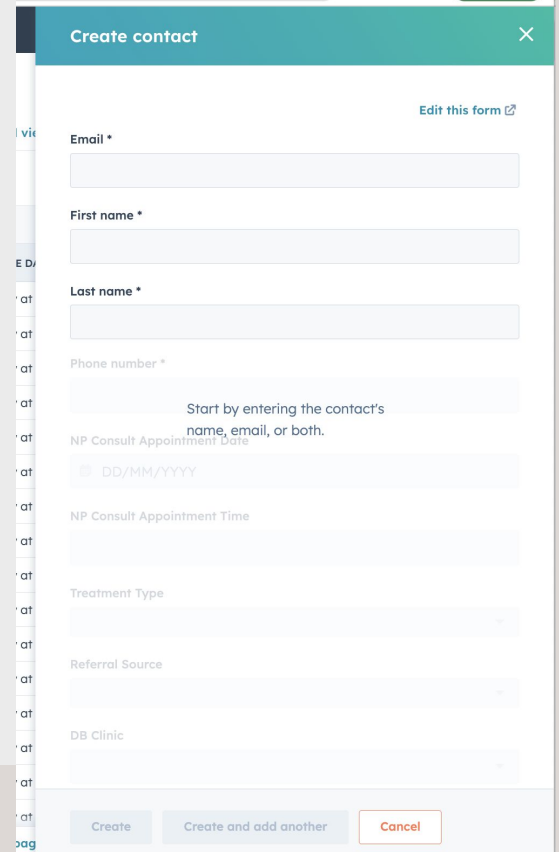
Export Edit columns

# HUBSPOT

## CREATING NEW PATIENT CONTACT



The image shows the top navigation bar of the HubSpot interface. It includes a dark blue header with the HubSpot logo on the left and navigation menus for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. On the right side of the header, there is a search icon, a notification bell, and a user profile icon for 'dentaboutique.com.au'. Below the header, the 'Contacts' section is visible, showing '98,923 records' and a filter for 'My contacts'. There are also buttons for 'Data Quality', 'Actions', 'Import', and 'Create contact'.



The image shows the 'Create contact' form in HubSpot. The form is titled 'Create contact' and has a close button (X) in the top right corner. It includes an 'Edit this form' link. The form fields are as follows:

- Email \***: A text input field.
- First name \***: A text input field.
- Last name \***: A text input field.
- Phone number \***: A text input field with a placeholder: "Start by entering the contact's name, email, or both."
- NP Consult Appointment Date**: A date picker field with a calendar icon and the format "DD/MM/YYYY".
- NP Consult Appointment Time**: A text input field.
- Treatment Type**: A dropdown menu.
- Referral Source**: A dropdown menu.
- DB Clinic**: A dropdown menu.

At the bottom of the form, there are three buttons: "Create", "Create and add another", and "Cancel".

# HUBSPOT

## ENTERING A DEAL INTO HUBSPOT

When entering a deal in hubspot you need to:

1. Select the contact
2. On the right hand side view the deals section
3. Select the 'Auto Generated' deal
  - a. If there is NO auto generated deal then you must create a new deal - you are not to use any other existing deals showing in the deals section as these belong to enquiries

# HUBSPOT

## ENTERING A DEAL INTO HUBSPOT

You must input all data into the fields provided in these screenshots

Deal Name - Patients Name

Deal Stage

Amount - Value of Deal

NP Consult Date

Deal Owner - PC

Treatment - Select Type

Treatment Start Date - If 'Won' Please

Input Treatment Start Date

Dentist

Consultation Type

Close Date - Date you have closed or you

expect the deal to close

Payment Method

Production - Is it High (HP), Medium (Invis etc) or Low (Hygiene, flgs etc)

PC Score - Likelihood to Close Deal

< Deals Actions ▾

### Wilke van de VenVeneers

Amount: AU\$18,000

Close Date:

Stage: **Consult Booked (autogenerated)** ▾

Pipeline: **PC - Sydney** ▾

Note Email Call Task Meeting More

▾ **About this deal**

Deal name  
Wilke van de VenVeneers

Deal stage  
Consult Booked (autogenerated) ▾

Amount  
AU\$18,000.00

NP Consult Appointment Date

Deal owner

Treatment  
 ▾

Treatment Start Date

View all propertiesView property history

▾ **PC Properties**

Dentist

Consultation Type

Close date

Payment Method

Production

PC Score (1 - 3)

Total Score  
--

# HUBSPOT

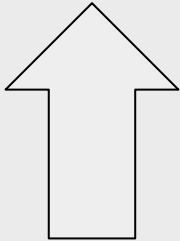
## UNDERSTANDING THE DEAL PIPELINE

Deals - PC - Brisbane My deals										
Search name or description										
Deal owner	Create date	Last activity date	Close date	Advanced filters (0)			Board actions			
CONSULT BOOKED (AUTO)	NP ATTENDED	IMPRESSIONS/SCANS TAKEN	FINANCE SUBMITTED - SUPP.	FINANCE PENDING - PAYME.	FINANCE APPROVED - SUPER	FOLLOW UP AT LATER DATE	PC FINANCE FINALISED (+ C.)	CLOSED SMALL TX - DEAL S.	PC CLOSED LOST	
<p><b>Julyana J Isaac</b>Veneers Close date: 17/06/2023</p> <p>Call 2 days ago 1 No activity scheduled</p> <p><b>Todd Suckling - New Deal</b> Close date: 15/07/2023</p> <p>All on Implant</p> <p>Call 3 days ago 1 No activity scheduled</p> <p><b>Edel Cotas DBB - New Deal</b> Close date: 17/06/2023</p> <p>Email 18 days ago 1 No activity scheduled</p> <p><b>Katherine Adgemis</b>Dental Bonding Close date: 17/06/2023</p> <p>Call 6 days ago 1 No activity scheduled</p> <p><b>Dahir Mohamed</b>All on Implants/Full arch implant Close date: 15/07/2023</p> <p>All on Implant</p> <p>Email 11 days ago 1 No activity scheduled</p> <p><b>Mani Yousif</b>Veneers Close date: 17/06/2023</p> <p>Call 2 days ago 1 No activity scheduled</p> <p><b>Mary Guzzo</b>Veneers Close date: 17/06/2023</p> <p>Call 6 days ago 1 No activity scheduled</p> <p><b>Eric Norton - New Deal</b> Close date: 17/06/2023</p> <p>Call 6 days ago 1 No activity scheduled</p> <p><b>Craig Weir</b> Close date: 17/06/2023</p>	<p><b>Cynthia Mageke</b>Other Amount: AU\$6,207 Close date: 30/05/2023</p> <p>Call 6 days ago 1 No activity scheduled</p> <p><b>Michael Georgiol - HOT LEAD</b> Amount: AU\$3,754 Close date: 29/05/2023</p> <p>Email 6 days ago 1 No activity scheduled</p> <p><b>Ambelwyn Snel</b>Veneers Amount: AU\$25,012 Close date: 28/05/2023</p> <p>Task 17 days ago 1 No activity scheduled</p>					<p><b>Carole Lanyon</b> Amount: AU\$11,000 Close date: 21/05/2023</p> <p>Call 20 days ago 1 No activity scheduled</p>	<p><b>David Onofrio</b> Amount: AU\$21,142 Close date: 30/05/2023</p> <p><b>Jackie Cundy</b>Veneers Amount: AU\$1,767 Close date: 22/05/2023</p> <p><b>Amber Wood</b> Amount: AU\$32,400 Close date: 18/05/2023</p> <p><b>Talib Al-khirsany</b> Amount: AU\$798 Close date: 09/05/2023</p> <p><b>Simon Murphy</b> Amount: AU\$20,112 Close date: 09/05/2023</p> <p><b>Elizabeth Lerowski</b> Amount: AU\$24,187 Close date: 08/05/2023</p>			
Total: AU\$10,777 Weighted: AU\$1,078 (10%)	Total: AU\$32,975 Weighted: AU\$16,487 (50%)	Total: AU\$0 Weighted: AU\$0 (0%)	Total: AU\$0 Weighted: AU\$0 (0%)	Total: AU\$0 Weighted: AU\$0 (0%)	Total: AU\$0 Weighted: AU\$0 (0%)	Total: AU\$11,000 Weighted: AU\$1,100 (10%)	Total: AU\$106,246 Won (100%)	Total: AU\$0 Won (100%)	Total: AU\$0 Lost (0%)	

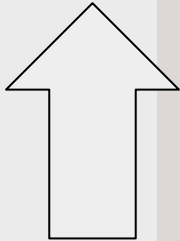
# HUBSPOT

## UNDERSTANDING THE DEAL PIPELINE

NP ATTENDED	3	IMPRESSIONS/SCANS TAKEN	0	FINANCE SUBMITTED - SUP...	0	FINANCE PENDING - PAYME...	0	FINANCE APPROVED - SUPER	0	FOLLOW UP AT LATER DATE	1	PC FINANCE FINALISED (+ C...	6	CLOSED SMALL TX - DEAL S...	0
Total: AU\$32,973 Weighted: AU\$16,487 (50%)		Total: AU\$0 Weighted: AU\$0 (60%)		Total: AU\$0 Weighted: AU\$0 (70%)		Total: AU\$0 Weighted: AU\$0 (70%)		Total: AU\$0 Weighted: AU\$0 (90%)		Total: AU\$11,000 Weighted: AU\$1,100 (10%)		Total: AU\$106,246 Won (100%)		Total: AU\$0 Won (100%)	



PENDING PATIENTS



WON PATIENTS

# HUBSPOT

## HOW LONG SHOULD PATIENTS STAY IN THE PIPELINE OF MY HUBSPOT PIPELINE?

PIPELINE SECTION	TIME PATIENT SHOULD BE IN PIPELINE	CONTACT POINTS DURING PIPELINE
NP Attended	2 weeks	4 points of contact over 2 weeks 2 in the first week 2 in the second week
Impressions/Scans Taken	2 weeks	4 points of contact over 2 weeks 2 in the first week 2 in the second week
Finance Submitted Super	4 – 6 Weeks	During application 1 – 2 times* Once application approved 2 times – First time to say congratulations on approval and ask for funds, second time once funds transferred to book appointments
Finance Pending Payment Plan	3 – 5 Days	Following up patients for documents if seeking special approval or loan approval
Follow Up At A Later Date	3 – 6 Months	Depending on reason to why follow up at a later date

# HUBSPOT

## BEFORE MOVING A PATIENT INTO CLOSED LOST PLEASE ENSURE

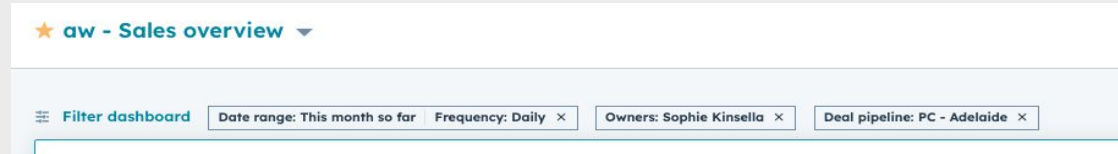
1. You have exhausted all options to try and close/win this patient – treatment plan, pricing, financial options
2. Have you spoke to your TL or BM about this patient's case to seek their opinion
3. Have you completed adequate follow up
4. Did this patient experience 'WOW customer service' from Dental Boutique
5. Identify where you think this patient became 'lost' in the service to not close – dentist, PC, experience

# HUBSPOT

## AW SALES OVERVIEW DASHBOARD

Update filter relative to:

1. Deal Pipeline
2. Owner
3. Date Range



(Next Slide for Step 2)

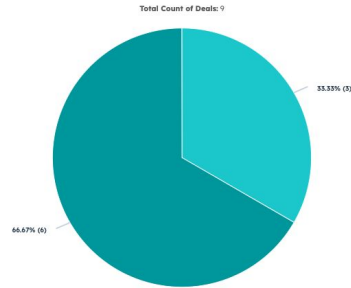
# HUBSPOT AW SALES OVERVIEW DASHBOARD

Review these charts in the dashboard  
Hover over the segment of the chart to see the results of:

1. Deals Won & Lost by Close Date
2. Deals Won & Lost by Consult Date

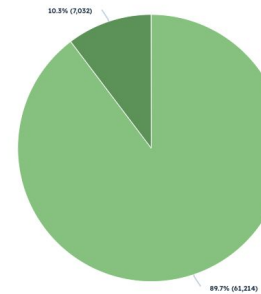
Deals won & lost by close date (pie)

Date range: This month so far  
● Won ● Open



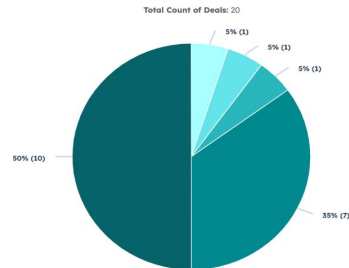
Deals won & lost by close date (pie - revenue)

Date range: This month so far  
● Open ● Won



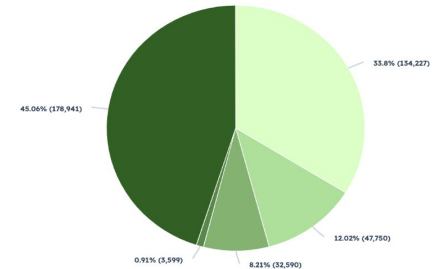
Deals won & lost by consult date (pie) - Clone

Date range: Last week  
● Finance Submitted - Super (PC - Mornington) ● Finance pending - Payment Plans (PC - Mornington)  
▲ 1/3 ▼



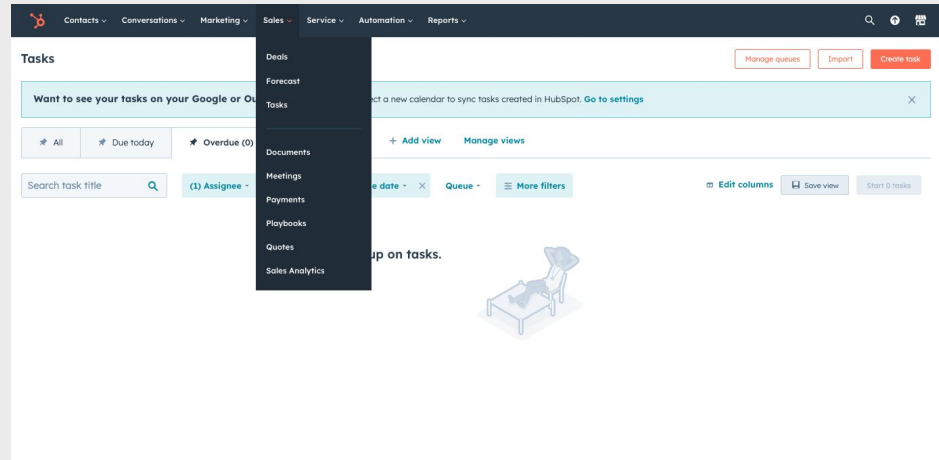
Deals won & lost by consult date (pie - revenue) - Clone

Date range: Last week  
● NP Attended (PC - Mornington) ● Finance Submitted - Super (PC - Mornington)  
▲ 1/3 ▼



# HUBSPOT TASKS

1. Sales - Tasks - Select Assignee - Review Due Today
  - a. There should be NO overdue tasks
- ANY pending patient MUST have a task assigned to them



# HUBSPOT

## NP ATTENDANCE MEETING LOG

1. Select Deal
2. Select Meetings
3. Select Log Meeting
4. Select Type - PC1 First Consult
5. Select Outcome
  - a. Completed = Attended
  - b. No Show = FTA
  - c. Rescheduled

TIP: Log NP Attended at the time of the consult  
Log FTA/Rescheduled the following day

The screenshot shows the HubSpot interface with the 'Log Meeting' dialog box open. The dialog box is titled 'Log Meeting' and has a dark blue header. It contains the following fields and options:

- Attendees:** 0 attendees -
- Outcome:** Select meeting outcome - PC1 - First Consult -
- Date:** 05/05/2023
- Describe the meeting:** (empty text area)
- Log Meeting Options:** Scheduled, Completed, Rescheduled, No Show (selected), Canceled
- Log activity:** (button)
- Create a task to follow up:** (checkbox)

The background interface shows the 'Activities' tab with the 'Meetings' sub-tab selected. The 'Log Meeting' button is visible in the top right corner of the 'Meetings' section. The 'Create Meeting' button is also visible. The 'Log Meeting' dialog box is positioned over the 'Meetings' section.

# HUBSPOT

## LOGGING CLOSED/LOST

1. Select Deal
2. Select Deal Stage
3. Input Closed Lost Reason
4. Input Treatment
5. Save

**Move deal** ✕

Before you can move **Dasha Kobzeff - New Deal** to **PC Closed Lost** you will need to update these properties

**Closed lost reason \***

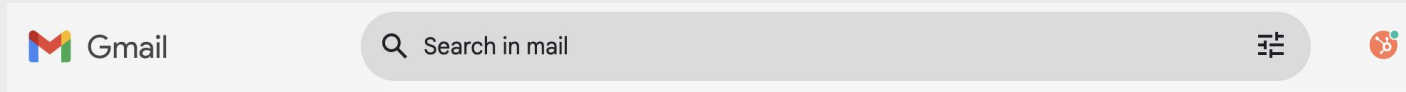
**Treatment \***

**> Previously completed properties**

# EMAIL

## SENDING SUMMARY EMAIL

1. Use the PC Email Summary template to send a recap
2. Ensure you hubspot is linked to your gmail this will link from gmail into hubspot



Utilise the resources found on the patient experience document to send to your patients

# AIRCALL

## SENDING SMS

1. Send SMS to patient once you have sent your summary email via aircall

“Hi X,

It was so great to meet you today! I have sent a summary email recapping what was discussed today. If you have any questions please do not hesitate to contact me via email or this number.

Thanks so much,  
PC NAME”