

Your Case Acceptance Daily Checklist

Run these eight moves on every treatment plan over \$1,500. The industry case-acceptance target is 90% but the average is 34%. ^[1] The gap is closed by what you say at the close, not what you diagnose at the chair.

- ☐ 1. Run the 5-question discovery script BEFORE showing the plan on the screen. Document every answer.

- ☐ 2. Build the value stack with at least six layers before quoting the price line. Top of the stack is your hero procedure. Bottom is your two-year workmanship warranty and the lab credibility line.

- ☐ 3. Use the 12-second doctor-to-coordinator hand-off. Name the coordinator. Frame her experience. Say "you're in great hands."

- ☐ 4. Climb the 5-yeses staircase. Step 1 dream. Step 2 timeline. Step 3 financing. Step 4 day pick. Step 5 schedule.

- ☐ 5. Pull the 5-objection rebuttal card the moment the patient says "let me think about it." Match the branch. Read the response. Listen.

- ☐ 6. Show the 3-option financing card on every plan over \$1,500. Disclose terms in plain words. Past 90 days converts to third-party financing.

- ☐ 7. Start the 7-touch follow-up cadence on every walk-out. Day 0, 2, 4, 7, 11, 16, 21. Doctor sends touch 3 personally.

- ☐ 8. Track the number weekly. Plans presented. Plans accepted. Plans rescued via follow-up. Skip this and you cannot fix what you cannot see.

Daily compliance reminders

- ☐ Every line item in the value stack is something the practice actually delivers. ADA Section 5 Veracity applies. ^[4]
 - ☐ Every financing program is reviewed by a qualified attorney in your state. ^[3]
 - ☐ Every SMS or email follow-up touch references the plan generally. No HIPAA-protected detail.
 - ☐ Every patient walks out with a signed printed plan or a "your plan is on hold for 12 months" note.
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References

- ^[1] Mouthwatch citing Levin Group + Jarvis Analytics.
<https://www.mouthwatch.com/resources/dental-case-acceptance>
- ^[2] Dental CEO Podcast. Case Acceptance Psychology Framework.
<https://dentalceopodcast.com/news/dental-case-acceptance-psychology-framework/>
- ^[3] ADA. Patient Financing Options. <https://www.ada.org/resources/practice/practice-management/patient-financing-options>
- ^[4] ADA. Code of Ethics, Section 5 Veracity. <https://www.ada.org/about/principles/code-of-ethics>

Want the full script book?

This checklist is the quick version. The full book has every line, every objection, every step.

GET THE FULL PLAYBOOK

You just used the quick version. The full **The Case Acceptance Script Book** has the complete breakdown, the word-for-word scripts, and the step-by-step playbook for getting more patients to say yes.

Book a call at **+1 (781) 828-2808** or start a case with Dickerman Dental Prosthetics to get the full **The Case Acceptance Script Book**.

Footer disclaimer

This checklist is educational only. Not legal, medical, or financial advice. Outcomes vary by practice, market, operator skill, and patient mix. Every clinical recommendation should be reviewed against current standards of care. Every financing program should be reviewed by a qualified attorney in your jurisdiction.