



Patient Engagement

Platforms driving loyalty via self-scheduling, portals, treatment acceptance, reactivation, and reputation management.

| | | |
|----------------------|----------------------|----------------------|
| VENDOR | DEMO DATE | WHO YOU SPOKE WITH |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

WHAT TO ASK ON A DEMO TICK WHAT THEY SAY · NOTE · N/A

- 01 Does online scheduling write directly into your PMS or send a staff request?** Doesn't apply

Real-time write-back eliminates phone tag and fills same-day gaps automatically.

Real-time write-back NOTES
 Staff request
 Not offered
- 02 How does the platform follow up on unaccepted treatment plans post-visit?** Doesn't apply

Moving diagnosed-but-not-scheduled treatment to booked appointments is the core engagement promise.

Automated sequence NOTES
 Staff-triggered
 Chairside only
- 03 How does the platform reactivate patients overdue for hygiene by 12+ months?** Doesn't apply

Lapsed-patient win-back is one of the highest-ROI functions in dental marketing.

Automated multi-touch NOTES
 One-time bulk message
 Not available
- 04 What can patients do in the portal or app, and what is 90-day adoption rate?** Doesn't apply

Adoption rate is the honest test of whether patients use it enough to retire paper forms.

Full-featured portal NOTES
 Forms & payments only
 No portal
- 05 Which PMS systems are fully integrated with real-time read and write?** Doesn't apply

Nightly sync runs on yesterday's data, producing wrong recall dates and duplicate outreach.

Real-time bidirectional NOTES
 Mixed real-time/nightly
 Nightly sync only

06 **How are reviews collected — and does the platform gate negative feedback?**

Doesn't apply

Gating unhappy patients away from public review links violates FTC guidelines.

- All patients equally
- Negatives gated
- Survey only

NOTES

07 **What is monthly cost, pricing basis, and what are contract/cancellation terms?**

Doesn't apply

Auto-renewing annual contracts with 60-day notice windows can trap a practice post-launch.

- Month-to-month
- Annual, short notice
- Annual, long notice

NOTES

08 **Who does onboarding, and how long until the platform is live?**

Doesn't apply

A six-week setup delays ROI and hidden retraining costs spike with staff turnover.

- Vendor-led, 2 weeks
- Shared, 4 weeks
- Self-service only

NOTES

09 **Who owns patient data, can you export it fully, and is a BAA signed upfront?**

Doesn't apply

A signed BAA is required before PHI flows, and clear exit terms prevent data hostage situations.

- Practice owns; full export; BAA upfront
- Shared or limited export
- BAA not reviewed

NOTES

10 **Can you provide two references from similar practices with a specific metric?**

Doesn't apply

A peer willing to share a real number outweighs any vendor ROI calculator.

- Two with hard metrics
- References, anecdotal
- None offered

NOTES

YOU'VE EXPLORED 1 OF 24 CATEGORIES

Imagine the rest of your practice running this clearly.

You sized up one category today. The other 23 — staffing, no-shows, insurance, slow collections — are already sorted, each vendor **classified by the problem it solves**.

EVERY PROBLEM IN YOUR PRACTICE, ALREADY SORTED

| | | | | | |
|----------------|---------------|---------------|---------------|-----------|---------------|
| Clinical AI | Imaging | Practice Mgmt | Patient Comms | Insurance | Revenue Cycle |
| Payments | Membership | Credentialing | Scheduling | Marketing | Analytics |
| AI Scribe | Teledentistry | Phone / VoIP | Virtual Assts | Staffing | HR & Training |
| Treatment Plan | Engagement | Supplies | Lab | Hardware | Compliance |

500+ vendors · sorted by the problem, vetted by our editors



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Get the next call right the first time.

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