BUSINESS AUTOMATION CASE STUDY

Multi-Location Patient Enquiry Automation

Jed Kesler DDS Family Dentistry

Independent workflow concept demonstrating lead capture, location routing, staff follow-up, reminders, and reporting. No client access, implementation, or measured results are claimed.

Prepared by

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Example service value: from $2,500

Multi-Step Business Automation System

1. Business problem and project scope

A multi-location dental practice can receive enquiries from website forms, phone calls, social profiles, and location pages. Without a structured intake and routing process, staff may need to copy information manually, decide which office should respond, and remember every follow-up.

This sample proposes a non-clinical enquiry workflow for three office locations. It is designed to help staff respond consistently while keeping treatment decisions and clinical communication with qualified dental personnel.

Problems the workflow addresses

- New enquiries arrive through different channels and may not enter one shared tracker.
- The requested service and preferred location may not reach the correct office promptly.
- Acknowledgements, staff assignments, and follow-up reminders can depend on manual action.
- Management may lack a simple weekly view of enquiry volume and response status.

Important assumption

The public form collects only basic contact and scheduling preferences. It must not request symptoms, diagnoses, treatment records, insurance documents, or other sensitive health information.

Sample objectives

- Create one structured record for every submitted enquiry.
- Route each record by preferred office and service category.
- Send a neutral acknowledgement and create a staff follow-up task.
- Escalate overdue enquiries and produce an operational summary.

2. Proposed automation workflow

1 **Website form** Consent + basic enquiry
2 **Validate** Required fields + duplicate check
3 **Route** Office + service category
4 **Acknowledge** Neutral confirmation email
5 **Assign** Staff task + response deadline
6 **Follow up** Reminder + weekly report

Example automation actions

- Create an enquiry ID and timestamp in the approved CRM or lead tracker.
- Send a short confirmation that the request was received; do not provide medical advice.
- Notify the assigned office with a link to the record and a response deadline.
- If the record is still unassigned after the agreed interval, notify an office manager.
- If staff marks the enquiry as contacted, stop automated reminders.
- Summarize counts by location, source, service category, and workflow status each week.

3. Fields and routing logic

Field	Purpose	Example
Name	Identify the enquirer	First and last name
Email / phone	Preferred contact method	Email or mobile number
Preferred office	Primary routing rule	Columbus / Cardington / West Jefferson
Service interest	Route to the right team	General, cosmetic, implants, other
Preferred time	Assist scheduling follow-up	Morning / afternoon
Consent	Permission to respond	Required checkbox
Source	Measure channel activity	Website, location page, campaign

Sample routing rules

- If preferred office is selected, assign the record to that location's queue.
- If no office is selected, route by postcode/service area or send to a central coordinator.
- If service category requires specialist review, add a secondary tag without making a clinical decision.
- If the same email or phone number submits again within a defined period, flag a possible duplicate for review.
- If consent is missing, do not trigger outreach; retain or discard the record according to the approved policy.

4. Exceptions, privacy, and testing

Scenario	Safe workflow response
Invalid contact data	Flag for manual review; do not repeatedly send failed messages.
Duplicate enquiry	Link or merge only after staff confirmation.
Urgent or clinical wording	Show an approved instruction to call the practice; do not diagnose or triage through the automation.
No staff response	Escalate to the agreed manager after the defined service interval.
Integration failure	Write an error log and alert an owner; preserve the original submission safely.
Opt-out request	Stop non-essential follow-up and apply the approved suppression rule.

Privacy-by-design checklist

- Collect the minimum information needed for a callback or scheduling request.
- Use client-owned accounts, role-based access, multi-factor authentication, and an approved retention period.
- Confirm whether the chosen tools, agreements, hosting, and integrations are appropriate before any sensitive data is processed.
- Keep clinical notes, treatment records, and medical decisions outside this demonstration workflow.

Testing plan

- Submit test records for every office, service category, missing field, duplicate, and invalid contact path.
- Verify acknowledgements, assignment rules, reminder stops, escalation timing, and error alerts.
- Obtain staff approval of every message template and routing rule before launch.

5. Deliverables, measurement, and value

Implementation deliverables

- Discovery workshop and approved workflow map.
- Form field specification, consent language placeholder, and data dictionary.
- Routing, assignment, acknowledgement, reminder, escalation, and error logic.
- Staff status definitions and operating instructions.
- Test cases, launch checklist, and handover documentation.
- Basic weekly operational report design.

Metrics to measure after a real implementation

Metric	Why it matters
Time to first staff response	Shows whether routing and alerts improve responsiveness.
Unassigned enquiry rate	Reveals records that are falling outside the process.
Follow-up completion rate	Measures whether assigned tasks are being closed.
Enquiries by office/source	Supports operational and marketing decisions.
Automation error rate	Shows reliability and where manual review is needed.

Portfolio positioning: Example of a Multi-Step Business Automation System — from $2,500. Final price depends on tools, integrations, number of locations, compliance requirements, testing, and support.

About this sample

This report is an independent portfolio concept based on publicly visible business information. It is not a paid engagement, is not affiliated with or endorsed by Jed Kesler DDS Family Dentistry, and does not claim access to private systems, implementation, or measured business results.

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