DIGITAL VISION · THE REVENUE WATERLINE AUDIT — DENTAL

The One-Page Process Plan

One practice process, one page — captured so your team can run it without coming to you.

Pick the one process in your practice that still runs through you or one key person — the new-patient call, following up on unscheduled treatment, confirmations, the morning huddle — and write it up here. One page. If it needs more than one page, the process is really two — split it.

1. PROCESS NAME

WHAT "DONE" LOOKS LIKE — the finished outcome, in one line

2. TRIGGER — what starts it

3. OWNER — the role, not a name

4. THE STEPS — plain verbs, in order. Each one doable without asking you. Keep it under nine.

Then run the Felt-Step Test on each one. Mark **Felt** if a patient would notice a machine doing it — that step stays human. Mark **Unfelt** if they wouldn't — that step is an automation candidate.

1		☐ Felt	☐ Unfelt
2		☐ Felt	☐ Unfelt
3		☐ Felt	☐ Unfelt
4		☐ Felt	☐ Unfelt
5		☐ Felt	☐ Unfelt
6		☐ Felt	☐ Unfelt
7		☐ Felt	☐ Unfelt
8		☐ Felt	☐ Unfelt

_____ Unfelt steps out of _____ total — that's your automation shortlist for this one process.

5. JUDGMENT POINTS — the 1–2 spots that genuinely need a human decision. Everything else is mechanical.

6. THE ONE METRIC — the number that says it's working

7. HOW IT'S CAPTURED

☐ Screen recording ☐ Written doc ☐ Checklist

WHERE IT LIVES

8. The three-month test. If you were out of the practice for three months, would this process keep running exactly as written? ☐ Yes ☐ No

If no — what's the one thing only you can currently do in it?

This is one process. Most practices have six to ten running through the owner or one key person. Getting them all out of people's heads, in the right order, and adopted by a team that has its own way of doing things — that's the work. Bring this one to your Revenue Waterline Audit call.

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