AI Playbook for

# Dental & Medical Offices.

Your phones are ringing, your chairs should be full, and your team shouldn't be drowning in admin to make it happen.

| **35%** | **$850** | **20 hrs/wk** |
|---|---|---|
| Of patient calls never get answered | Lost per missed call in first-year revenue | Saved with AI scheduling and intake |

# Start here.
## Three things to try right now.

No patient data required. Just open Claude and type.

### Audit your patient experience.

**30 seconds**

Copy your last 20 Google reviews into claude.ai. Type: "What do patients consistently praise? What complaints keep coming up? Give me 3 strengths, 3 things to fix, and a staff recognition list for our next team meeting."

1

### Calculate what no-shows cost you.

**60 seconds**

Type: "My practice sees 25 patients a day, average revenue per visit is $275. We had 47 no-shows last month. Calculate my lost revenue, lost chair time, and annual cost. Then give me a 3-step plan to cut it in half."

2

### Build a treatment acceptance script.

**2 minutes**

Type: "A patient needs a crown but is hesitant because of cost. Write a script for my treatment coordinator that explains why it matters, what happens if they wait, presents financing, and closes with a soft ask."

3

**Now imagine this across your entire practice.**
**That's where Mercantile comes in.**

# A typical Monday.
## Before and after.

| BEFORE AI | AFTER AI |
|---|---|
| **7:30 AM** | **7:30 AM** |
| Six voicemails from the weekend. Front desk listens, writes them down, calls back one by one. Two already booked somewhere else. | Missed calls got instant text-backs with a booking link. Four of six scheduled themselves over the weekend. Front desk starts the day clean. |
| **9:00 AM** | **9:00 AM** |
| Phone rings nonstop. Front desk is checking in patients, verifying insurance, and answering calls at the same time. Three calls go to voicemail. | AI handles routine calls: confirmations, directions, hours, and basic insurance questions. Front desk focuses on the patients standing in front of them. |
| **11:00 AM** | **11:00 AM** |
| Patient hears they need a crown. Sticker shock. "Let me think about it." No follow-up system. That $1,200 treatment walks out the door. | Treatment coordinator uses an AI-built script that addresses cost, explains urgency, and presents financing. Patient schedules before they leave. |
| **1:00 PM** | **1:00 PM** |
| Two no-shows this afternoon. Chairs sit empty. Staff could have seen other patients but the slots are wasted. Revenue gone. | AI flagged high-risk no-shows two days ago. Extra reminders went out. One confirmed, one cancelled early enough to fill from the waitlist. |
| **4:00 PM** | **4:00 PM** |
| Office manager spends an hour chasing patients overdue for hygiene. Calls half of them. Most go to voicemail. | Automated reactivation texts went out last week. Twelve patients overdue for cleanings booked themselves. No phone calls needed. |
| **6:00 PM** | **6:00 PM** |
| Dentist spends the evening catching up on chart notes, reviewing the schedule, and stressing about empty slots. | Notes were drafted from visit summaries during the day. Schedule is full. Dentist is home for dinner. |

# Your practice loses 25+ hours a week doing work AI can do in minutes.

**1**

### Phone Calls & Patient Inquiries

AI answers routine calls, texts back missed calls with booking links, and handles confirmations, directions, and insurance questions without staff involvement.

9 hrs/wk  >>  2 hrs/wk

$21K/yr saved

**2**

### Scheduling & No-Show Management

Automated reminders, predictive no-show flagging, and waitlist backfill keep your chairs full. Patients who cancel get rebooked before the slot goes empty.

6 hrs/wk  >>  1 hr/wk

$18K/yr saved

**3**

### Patient Recall & Reactivation

Automated outreach to patients overdue for hygiene, follow-ups, and annual visits. Your schedule fills from your existing patient base without chasing anyone.

5 hrs/wk  >>  30 min/wk

$14K/yr saved

**4**

### Treatment Acceptance & Follow-Up

AI-built scripts for cost conversations, follow-up sequences for patients who said let me think about it, and financing presentations that close more cases.

4 hrs/wk  >>  1 hr/wk

$12K/yr saved

**5**

### Reviews, Content & Admin

Google review responses drafted, patient education content created, and website copy updated. The work that always gets pushed to when we have time.

5 hrs/wk  >>  1 hr/wk

$10K/yr saved

# Your AI tools.
## Built and managed for you.

Mercantile evaluates your practice, recommends the right tools,
and handles implementation and management. You just treat patients.

### Claude AI

The engine behind everything. Patient communications, treatment scripts, review responses, staff training materials, and reporting.

### Chiirp

AI-powered text-back for missed calls, appointment reminders, recall campaigns, and review requests. Patients get a response in seconds.

### n8n

Workflow automation connecting your practice management software, phone system, email, and text messaging. Runs in the background.

### Fireflies.ai

AI notetaker for internal team meetings and huddles. Transcribes, summarizes, and tracks action items so nothing gets dropped.

### ChatGPT

A second AI option for different workflows. Some tasks work better across tools. Mercantile helps you know which to use when.

# How Mercantile works.
## Operations expertise meets AI.

Mercantile was built for practices that want to spend more time with patients and less time running the business. Whether you're a solo provider or a multi-location group, the back office shouldn't run on sticky notes and whoever answers the phone first. We bring 10+ years of operations experience and AI that actually works so the practice runs as well as the care you provide.

### 1 Discovery & Strategy

Mercantile looks at how your practice runs today. Where the time goes, where patients fall off, and where AI fits without disrupting your workflow.

### 2 Build & Implement

Mercantile handles setup, configuration, and rollout. Your team doesn't learn new software. They just start using it.

### 3 Stay Current & Scale

AI moves fast. Mercantile keeps your operation on the latest tools and workflows so you're always ahead, not catching up.

# Ready to see what your practice is leaving on the table?

This is a lot to take on alone. That's where Mercantile comes in.
Book a call and I'll look at how your practice actually runs,
show you where AI fits, and what it's worth to fix.

## https://workwithmerc.as.me

tap to book your call

justin@workwithmerc.com

(602) 753-9234