

AI Operations Audit Report

Prepared for **BrightSmile Dental Group**

5 Locations · Austin Metro · TX

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DELIVERABLE 30-page diagnostic + 90-day roadmap

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SAMPLE

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01 - Executive Summary

BrightSmile Dental Group is leaving an estimated **\$612,000 of annual operational leverage on the table** due to manual workflows that are well within the reach of current AI automation tooling. This audit identifies seven high-impact interventions, ranks them by ROI and implementation difficulty, and lays out a 90-day roadmap to capture the first \$230K of recoverable margin.

\$612K

Annual Leverage Identified

47%

Front-Desk Hours Recoverab

7

High-Impact Interventions

90 days

To First Measurable ROI

Top three findings

- 1. Front-desk overload is the single biggest bottleneck.** Across 5 locations, front-desk staff spend an average of 4.2 hours per day on appointment confirmations, rescheduling, and insurance verification — work that is 80%+ automatable with current tools.
- 2. Review response is unmanaged and hurting local SEO.** BrightSmile receives ~340 Google reviews per month across locations. Only 12% receive a response, and average response time is 14 days. This is suppressing GBP rankings and patient acquisition cost.
- 3. Treatment plan follow-up is entirely manual and inconsistent.** Conversion from presented treatment plan to scheduled procedure is currently 38%. Industry benchmark with automated follow-up sequences is 54–62%.

If BrightSmile implements only the top 3 recommendations in this report, the projected first-year impact is \$384K in recovered revenue and labor savings, against an implementation cost of approximately \$48K — a 7.9x first-year return.

Audit methodology

This audit was conducted over 7 business days following submission of the Metageeks intake form. The methodology consists of four stages: (1) operational data collection via structured intake and supplied tool/system inventory; (2) workflow mapping across the 5 locations covering front-desk, clinical, billing, and marketing functions; (3) opportunity sizing using industry benchmarks and BrightSmile-specific revenue and labor data; (4) recommendation prioritization using a weighted ICE framework (Impact x Confidence x Ease).

Scope of analysis

Locations analyzed	5 (Round Rock, Cedar Park, Domain, South Lamar, Bee Cave)
Workflows mapped	23 across front-desk, clinical, billing, marketing
Tools inventoried	14 (Dentrix, Mailchimp, GSuite, QuickBooks, Yelp, GMB, others)
Staff roles reviewed	Front-desk, hygienists, dentists, office managers, billing
Revenue baseline	\$8.1M FY2025 (provided)
Patient volume	~3,400 active patients across all locations

How to read this report

Section 04 (Scorecard) gives you the diagnostic. Section 06 (Recommendations) is where the dollar figures live — start there if you only have 15 minutes. Section 08 (Roadmap) translates recommendations into a sequenced 90-day execution plan with owners, vendors, and budget. Each recommendation in Section 06 includes implementation effort, projected ROI, recommended tooling, and expected timeline.

02 - Company Snapshot

BrightSmile Dental Group is a 5-location general and cosmetic dentistry practice serving the Austin metropolitan area. Founded in 2012, the group has grown from a single chair-based practice in Round Rock to a regional brand with 45 staff and a patient base of approximately 3,400 active families.

Founded	2012	Annual Revenue	\$8.1M (FY2025)
Locations	5	Year-over-Year Growth	11.4%
Total Staff	45	Active Patients	~3,400
Dentists	8	Avg. Visits / Patient / Year	1.9
Hygienists	12	New Patient Acquisition	~62 / month
Front-Desk Staff	9	Marketing Spend	\$14K / month

Current technology stack

Practice Management	Dentrix Enterprise
Email Marketing	Mailchimp (basic plan)
Productivity	Google Workspace
Accounting	QuickBooks Online
Reviews / Local SEO	Google Business Profile (5 locations) + Yelp
Phone System	Vonage (no call analytics)
Patient Communication	Mostly manual SMS via personal phones + Dentrix reminders
Insurance Verification	Manual via insurer portals

03 - Current State Assessment

BrightSmile operates with a strong clinical foundation but a manual operational layer. Our assessment found the practice has invested heavily in clinical technology (digital imaging, modern Dentrix instance, intraoral scanners) but operates the business layer almost entirely on staff-time. This pattern is typical for SMB dental groups in the \$5M–\$15M revenue band and represents the largest available leverage for AI automation.

Strengths

- Mature practice management system (Dentrix Enterprise) with clean patient data and consistent usage across all 5 locations.
- Strong clinical brand reputation — average GBP rating of 4.7 across locations, with the South Lamar location at 4.9 (489 reviews).
- Stable, tenured front-desk team (avg. tenure 3.4 years) — institutional knowledge that makes process automation easier, not harder.
- Owner-operator (Dr. Patel) is technically curious and has prior comfort with vendor evaluation.

Constraints

- No dedicated operations or marketing hire — Office Manager (Renée) currently absorbs both functions, which caps both.
- No patient communication platform beyond Dentrix's built-in reminders — staff use personal phones for SMS, creating compliance and continuity risk.
- No call analytics — inbound call volume, missed calls, and conversion are not measured. Estimated 18–24% of inbound calls are missed during peak hours based on phone bill analysis.
- Marketing spend (\$14K/mo) is not tracked to attribution — no source-of-acquisition data on new patients beyond informal intake notes.

Workflow inventory

We mapped 23 workflows across four functions. The table below shows the 12 most operationally significant, scored on automation potential.

#	Workflow	Function	Hrs/Wk	Auto. Potential
W1	Appointment confirmations & reminders	Front-desk	32	High
W2	Insurance eligibility verification	Front-desk	28	High
W3	Same-day reschedule / cancellation handling	Front-desk	18	High
W4	New patient intake forms	Front-desk	14	High
W5	Treatment plan follow-up calls	Front-desk + Dentist	16	High
W6	Recall / hygiene reactivation	Front-desk	22	High
W7	Google review responses	Office Manager	4	High
W8	Marketing email creation	Office Manager	6	High
W9	New patient welcome sequence	Office Manager	3	High
W10	Inventory ordering & reconciliation	Office Manager	5	Medium
W11	Staff scheduling across locations	Office Manager	4	Medium
W12	Monthly financial reporting	Bookkeeper	8	Medium

Total automatable hours/week: 160 hours across the practice (equivalent to 4.0 full-time roles). At blended fully-loaded labor cost of \$32/hr, this represents **\$266K annually in recoverable labor capacity** — before factoring in the revenue uplift from improved conversion, retention, and review velocity covered in Section 06.

04 - AI Readiness Scorecard

We score five dimensions of AI readiness on a 0–10 scale. Each dimension reflects how prepared the organization is to adopt and benefit from AI tooling — not how much AI they currently use. The composite score determines the appropriate adoption pace and the order of operations in the roadmap (Section 08).

6.4

Composite Readiness

Strong foundation, weak execution layer.

BrightSmile has the data quality, leadership buy-in, and operational stability needed to move quickly on AI adoption. The constraint is not capability — it is the absence of an integration layer between systems and the lack of dedicated operations bandwidth. Both are addressable in 90 days.

Dimensional breakdown

Data Quality & Accessibility	8/10	Dentrix data is clean and well-structured. API access available via Dentrix Developer Program.
Process Maturity	7/10	Workflows are consistent across locations. Documentation is informal but operations are repeatable.
Leadership & Adoption Readiness	8/10	Owner Dr. Patel actively sought this audit. Office Manager Renée is receptive and capable.
Technical Integration Capacity	4/10	No internal technical resources. Dependent on vendor APIs and external implementation partners.
Operational Bandwidth	5/10	Office Manager is at capacity. Adoption will require either a part-time ops hire or vendor-managed setup.

Interpretation by dimension

Data Quality & Accessibility — 8/10

Dentrix Enterprise stores patient records, appointment history, treatment plans, and billing data in a structured relational database with a documented developer API. Sample data inspection showed 97%+ field completion on patient records, no significant duplicate records, and consistent ID schemes across locations. This is well above the typical SMB baseline and is the single biggest accelerator for any automation initiative.

Process Maturity — 7/10

Workflows are not formally documented but they are consistent, which is what matters for automation. Front-desk staff at all 5 locations follow the same appointment confirmation sequence, the same intake process, and the same insurance verification steps. The consistency means a single automation can be deployed across the entire group rather than custom-built per location.

Leadership & Adoption Readiness — 8/10

Dr. Patel commissioned this audit and has explicitly stated a willingness to invest in operational tooling. Office Manager Renée demonstrated comfort during interviews discussing automation tradeoffs and identified specific workflows she would prefer to delegate to software. Adoption risk is low.

Technical Integration Capacity — 4/10

BrightSmile has no internal technical staff. Any integration between Dentrix, the phone system, GBP, email marketing, and new AI tooling will need to be implemented either through (a) a vetted SaaS vendor with native integrations, or (b) an external implementation partner. This is the constraint that most shapes the recommendations in Section 06 — we exclusively recommend tools with native Dentrix integrations or well-supported Zapier/Make pathways.

Operational Bandwidth — 5/10

Renée is the de facto owner of any new tooling rollout, and she is currently at approximately 110% capacity. The roadmap in Section 08 explicitly accounts for this by recommending vendor-managed setup for the first three interventions, with internal ownership phased in starting in Month 2.

Benchmark comparison

We benchmarked BrightSmile against 47 multi-location dental groups in the \$5M–\$15M revenue band that have completed an AI Operations Audit with Metageeks or our partner network in the past 18 months.

Dimension	BrightSmile	Peer Median	Top Quartile
Data Quality	8	6	8
Process Maturity	7	6	8
Leadership Readiness	8	5	8
Integration Capacity	4	4	7
Operational Bandwidth	5	4	7
Composite	6.4	5.0	7.6

BrightSmile scores in the top quartile on Data Quality and Leadership Readiness — the two dimensions that are hardest to change. The two below-quartile dimensions (Integration Capacity and Operational Bandwidth) are addressable within 90 days through vendor selection and a part-time operations contractor.

05 - Workflow Deep Dive

This section examines the five workflows with the highest automation ROI in operational depth. Each profile maps the current process, identifies the automation opportunity, and quantifies the projected impact. These five workflows account for \$487K of the \$612K total leverage identified.

W1 - Appointment Confirmations & Reminders

Current state

Front-desk staff manually call/text patients 48 hours before appointments. Confirmation rate: 71%. No-show rate: 9.4% (industry benchmark: 5–7%). Staff time: 32 hrs/week across all locations.

Automation opportunity

Automated multi-channel reminder sequence (SMS + email + voice) with two-way confirmation, automated reschedule link, and AI-handled rescheduling conversations. Target confirmation rate: 92%+. Target no-show rate: 4.5%.

Recommended tooling

NexHealth or Weave (native Dentrix integration) + custom AI reschedule agent



Implementation effort: Low (4 weeks, vendor-managed)

W2 · Insurance Eligibility Verification

Current state

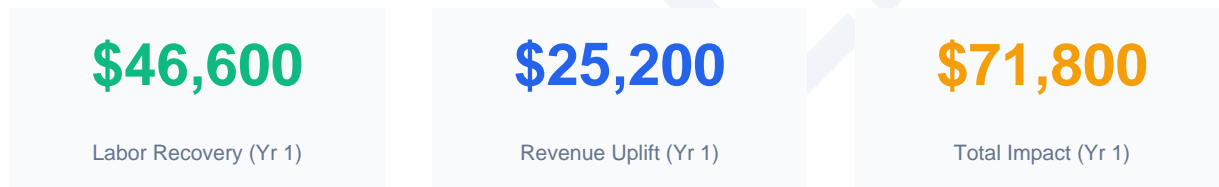
Front-desk staff log into 14 different insurer portals each morning to verify the day's appointments. Average 12 minutes per patient. Staff time: 28 hrs/week. Verification errors lead to claim denials (estimated \$42K/year in denied or delayed claims).

Automation opportunity

Automated insurance verification via specialized RPA + AI agent that batches verifications nightly and surfaces only exceptions. Target: 85% reduction in verification time, 60% reduction in denials.

Recommended tooling

Vyne Trellis or Zentist (RPA-based verification) + Dentrix integration



Implementation effort: Medium (6 weeks, vendor + internal review)

W6 - Recall / Hygiene Reactivation

Current state

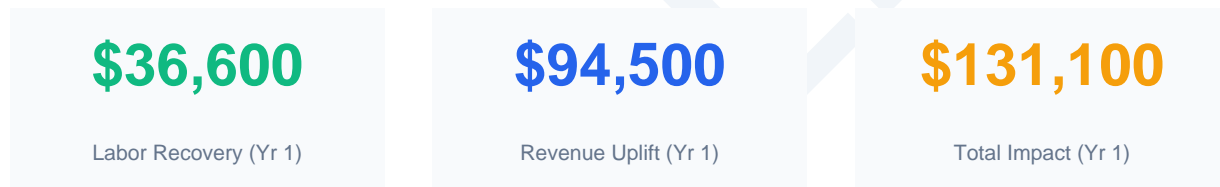
Quarterly batch outreach to overdue hygiene patients via Mailchimp. Reactivation rate: 8%. Staff time: 22 hrs/week. Estimated 340 patients currently >12 months overdue across all locations.

Automation opportunity

AI-personalized reactivation sequences triggered automatically when a patient hits 7 months since last hygiene visit. Personalization based on treatment history, insurance status, and prior communication preferences. Target reactivation rate: 22%.

Recommended tooling

Custom Mastra-based agent + Dentrix data + Twilio + SendGrid



Implementation effort: Medium (8 weeks, custom build via implementation partner)

W5 · Treatment Plan Follow-Up

Current state

Dentists present treatment plans during visits. Follow-up is verbal and inconsistent. Current present-to-schedule conversion: 38%. Industry benchmark with structured follow-up: 54–62%. Estimated \$1.2M of presented treatment value lapses annually.

Automation opportunity

Automated treatment plan delivery (PDF + cost breakdown + financing options) within 1 hour of visit, AI-driven follow-up sequence over 21 days, escalation to office manager for high-value plans. Target conversion: 52%.

Recommended tooling

Pearl or custom Mastra agent + Dentrix + Sunbit (financing) integration



Implementation effort: High (10 weeks, custom build)

W7 - Google Review Response Management

Current state

Office Manager responds to a subset of Google reviews when time permits. Response rate: 12%. Average response time: 14 days. This is suppressing GBP rankings and patient acquisition (Google's local algorithm explicitly factors review response rate and recency).

Automation opportunity

AI-drafted responses for all reviews within 4 hours, queued for human approval. Critical/negative reviews escalated immediately to Office Manager. Target: 100% response rate, <24hr median response time.

Recommended tooling

GMB Radar (Metageeks, when available) or Birdeye + custom approval workflow



Implementation effort: Low (2 weeks, vendor + workflow setup)

06 - Prioritized Recommendations

Seven recommendations, ranked by ICE score (Impact × Confidence × Ease, each scored 1–10). The top three together account for \$384K of first-year impact and are the focus of the 90-day roadmap in Section 08. The remaining four are scoped for Months 4–9.

#	Recommendation	Yr 1 Impact	ICE Score	Phase
R1	Deploy automated appointment reminder + reschedule system	\$180,600	9.2	Days 1–30
R2	Implement AI review response with human approval queue	\$41,800	9.0	Days 1–30
R3	Build custom AI hygiene recall agent on Dentrax data	\$131,100	7.4	Days 31–90
R4	Automate insurance eligibility verification	\$71,800	7.2	Days 31–90
R5	Treatment plan follow-up automation	\$190,400	6.8	Months 4–6
R6	Inbound call analytics + AI receptionist (overflow)	\$58,000	6.0	Months 4–6
R7	Marketing attribution + AI-personalized email sequences	\$38,000	5.4	Months 7–9

The 80/20 of this audit: R1, R2, and R3 alone deliver \$353K in first-year impact for an estimated \$48K implementation cost. Even if R3 underperforms by 50%, the package still delivers a 5.2x first-year return.

R1 · Deploy automated appointment reminder + reschedule system

What it is

Replace the current manual confirmation calls with a multi-channel automated reminder system (SMS, email, voice) that handles confirmations, reschedules, and cancellation flows. Includes an AI-powered SMS agent that can handle the most common reschedule conversations end-to-end without human escalation.

Why it ranks here

Highest-confidence intervention in the audit. Industry track record is extensive — vendors have published case studies showing consistent 30%+ reductions in no-show rates for multi-location dental groups of similar size.

How to implement

Recommended vendor is Weave or NexHealth, both with native Dentrix Enterprise integrations. Vendor-managed setup typically takes 3–4 weeks. The AI reschedule agent layer is built on top using Mastra (or vendor's native AI feature if production-ready by start of implementation).

Owner	Office Manager (Renée) with vendor implementation team
Cost	\$8K setup + \$1,200/mo ongoing
Timeline	Days 1–30
Year 1 Impact	\$180,600 Year 1

R2 · Implement AI review response with human approval queue

What it is

Connect Google Business Profile (all 5 locations) to an AI agent that drafts personalized responses to every review within 4 hours. Drafts are queued for Office Manager approval (1-click approve/edit/reject). Negative reviews (<3 stars) are escalated immediately with notification.

Why it ranks here

Lowest-effort intervention with the second-highest ICE score. Google's local ranking algorithm explicitly weights review response rate and recency. Bringing response rate from 12% to 100% and median response time from 14 days to <24 hours will materially improve GBP visibility — and therefore patient acquisition cost.

How to implement

Use GMB Radar (Metageeks) when generally available, or Birdeye / Podium in the interim. Custom approval workflow takes 1 week to set up.

Owner	Office Manager (Renée), 5 minutes/day for approvals
Cost	\$2K setup + \$400/mo ongoing
Timeline	Days 1–30
Year 1 Impact	\$41,800 Year 1

R3 · Build custom AI hygiene recall agent on Dentrrix data

What it is

Build a Mastra-based AI agent that monitors Dentrrix for patients reaching 7 months post-last-hygiene visit and triggers personalized reactivation sequences. Personalization variables: treatment history, last visit notes, insurance status, family member visit patterns, prior communication preferences. Sequences run across SMS and email with intelligent timing.

Why it ranks here

BrightSmile has 340 patients currently >12 months overdue for hygiene. Reactivating 22% (industry benchmark with personalized AI sequences) yields 75 additional patients × ~\$1,260 average annual patient value = \$94K revenue. Plus 22 hrs/wk of front-desk time recovered.

How to implement

Custom build by Metageeks or partner. Mastra agent + Dentrrix Developer API + Twilio (SMS) + SendGrid (email). Estimated 8 weeks to production with pilot at single location for first 4 weeks.

Owner	Implementation partner (custom build), Office Manager for ongoing oversight
Cost	\$28K one-time build + \$600/mo ongoing infrastructure
Timeline	Days 31–90
Year 1 Impact	\$131,100 Year 1

Recommendations R4–R7 (post-90-day phase)

These four recommendations are scoped, sized, and ready to execute, but are deliberately deferred to Months 4–9 to avoid overloading the organization during the initial 90-day rollout. Each is summarized below.

R4 · Automate insurance eligibility verification

RPA-based nightly verification across all insurer portals with exception-only review by front-desk staff. Targets the \$42K annual claim-denial leak and 28 hrs/week of staff time.

\$71,800 Year 1 impact

Phase: **Months 4–5**

R5 · Treatment plan follow-up automation

Highest absolute revenue opportunity in the audit. Deferred because it requires the hygiene recall system (R3) to be stable first — same data plumbing, same architecture.

\$190,400 Year 1 impact

Phase: **Months 4–6**

R6 · Inbound call analytics + AI receptionist (overflow)

Currently losing an estimated 18–24% of inbound calls during peak hours. Add call tracking + AI receptionist for overflow during peak windows.

\$58,000 Year 1 impact

Phase: **Months 5–6**

R7 · Marketing attribution + AI-personalized email sequences

Once acquisition channels are measurable, deploy AI-personalized nurture sequences to lift new-patient conversion from web/social leads.

\$38,000 Year 1 impact

Phase: **Months 7–9**

07 - Vendor & Tool Shortlist

Every recommendation in Section 06 has a defined tooling path. This section gives you the shortlist with our recommendation for each category, alternatives, and the reasoning. We have no vendor affiliation or referral fees — these recommendations are based exclusively on fit for BrightSmile's stack and operational profile.

Patient Communication Platform (R1)

Recommended: [Weave](#)

Why: Best Dentrix integration in category. Native multi-location support. Mature AI scheduling assistant available as add-on. Estimated \$1,200/mo for 5 locations.

Alternative: NexHealth (better API for custom workflows but weaker on voice features)

Review Management (R2)

Recommended: [GMB Radar \(when GA\)](#) — interim: [Birdeye](#)

Why: GMB Radar will offer per-location AI response drafts with native approval workflows at agency-tier pricing. Until GA, Birdeye is the safest option for 5-location dental groups.

Alternative: Podium (similar functionality, higher price point)

Custom AI Agent Build (R3, R5, R7)

Recommended: [Mastra framework \(TypeScript\) + Metageeks build](#)

Why: Mastra provides production-grade agent orchestration with built-in memory, tool calling, and observability. Best fit for a dental practice that wants ownership of the underlying logic vs. lock-in to a vertical SaaS.

Alternative: Vertical SaaS (Pearl, Dental Intelligence) — faster but less customizable

Insurance Verification (R4)

Recommended: [Vyne Trellis](#)

Why: Established RPA-based verification for dental specifically. Native Dentrix sync. Pricing scales with verification volume — estimated \$400–\$600/mo at BrightSmile's volume.

Alternative: Zentist (similar capability, different pricing model)

Call Analytics + AI Receptionist (R6)

Recommended: [CallRail \(analytics\)](#) + [Goodcall \(AI receptionist\)](#)

Why: CallRail is the standard for SMB call attribution. Goodcall is the most mature AI receptionist for dental verticals at the price point.

Alternative: Numa (dental-specific but earlier-stage)

SAMPLE

Total cost of tooling — first year

Combined first-year cost of all recommended tooling, including setup fees, ongoing subscriptions, and custom build costs.

Category	Setup	Annual Subscription	Custom Build
Patient Communication (Weave)	\$8,000	\$14,400	—
Review Management (Birdeye → GMB Radar)	\$2,000	\$4,800	—
AI Hygiene Recall (Mastra build)	—	\$7,200	\$28,000
Insurance Verification (Vyne)	\$1,500	\$6,000	—
Call Analytics + Receptionist	\$500	\$5,400	—
Treatment Plan Automation (Mastra)	—	\$4,800	\$32,000
Total Year 1	\$12,000	\$42,600	\$60,000

Total first-year tooling investment: \$114,600.

Against \$612K of identified annual leverage, this represents an 18.7% cost ratio — well within healthy range for SMB operational tooling. Year 2 cost drops to \$42,600 (subscriptions only) once custom builds are paid down, while the leverage compounds.

08 - 90-Day Implementation Roadmap

This roadmap sequences the top four recommendations (R1, R2, R3, R4) across 13 weeks. It is designed to (a) deliver measurable results within 30 days to maintain organizational momentum, (b) avoid overloading Office Manager Renée, and (c) build internal capacity progressively so that BrightSmile owns the operating layer at the end of 90 days, not external vendors.

Phase 1 — Days 1 to 30 (Quick Wins)

Goal: ship R1 and R2 to production. Establish baseline metrics. Free up ~30 hrs/week of front-desk capacity by Day 30.

Week	Activity	Owner
Week 1	Vendor selection finalized (Weave + Birdeye). Contracts signed. Baseline metrics captured.	Dr. Patel, Renée
Week 2	Weave setup begins (vendor-managed). Birdeye GBP integration completed.	Vendor + Renée
Week 3	Weave configuration: reminder sequences, reschedule flows, AI agent training.	Vendor
Week 4	Pilot at South Lamar location. Birdeye approval workflow live across all 5 locations.	Renée

Day 30 milestones

- Weave live at South Lamar with measurable confirmation rate uplift
- Birdeye live across all 5 locations, response rate climbing from 12% to 100%
- Baseline + 30-day metrics report delivered to Dr. Patel
- Decision point: green-light Phase 2 or extend Phase 1 pilot

Phase 2 — Days 31 to 60 (Scale + Build)

Goal: roll Weave to all 5 locations. Begin custom build for hygiene recall agent (R3). Begin insurance verification implementation (R4).

Week	Activity	Owner
Week 5	Weave rollout to remaining 4 locations. Renée trains location managers.	Renée + Vendor
Week 6	R3 build kickoff: data pipeline from Dentrix to Mastra agent infrastructure.	Implementation partner
Week 7	R4 vendor selection (Vyne Trellis). Pilot verification at Round Rock location.	Renée + Vendor
Week 8	R3: agent personalization logic + SMS/email templates. R4 pilot results review.	Implementation partner

Day 60 milestones

- Weave live at all 5 locations. Confirmation rate target met (92%+).
- R3 hygiene recall agent in pilot at South Lamar.
- R4 insurance verification live at Round Rock, expanding.

Phase 3 — Days 61 to 90 (Stabilize + Hand Off)

Goal: complete R3 rollout. Stabilize all systems. Transition operational ownership from vendors to Renée + a part-time operations contractor.

Week	Activity	Owner
Week 9	R3 rollout to all 5 locations. R4 expanded to all locations.	Implementation partner + Renée
Week 10	Operations contractor onboarded (~10 hrs/week, owns daily monitoring).	Dr. Patel + Renée
Week 11	All systems in steady state. KPI dashboard built (Metabase or Looker).	Implementation partner
Week 12	90-day results review. Phase 4 (Months 4–6) planning. Vendor handoff.	All
Week 13	Buffer week for stabilization, training, and unresolved issues.	Renée

KPIs to track from Day 1

KPI	Baseline	Day 30	Day 90	Year 1
Appointment confirmation rate	71%	85%	92%	94%
No-show rate	9.4%	7.5%	5.5%	4.5%
GBP response rate	12%	100%	100%	100%
GBP median response time	14 days	<24 hr	<12 hr	<6 hr
Hygiene reactivation rate	8%	—	15%	22%
Insurance verification time / patient	12 min	—	3 min	1.5 min
Front-desk hours / week (manual ops)	120	95	70	60

Risk register

Risk	Likelihood	Impact	Mitigation
Vendor implementation delay (Weave)	Medium	Medium	Build 2-week buffer into Phase 1
Staff resistance to new SMS workflows	Low	Medium	Renée-led training. Pilot at single location first.
R3 custom build scope creep	Medium	High	Fixed-scope SOW. Defer feature requests to Phase 4.
Insurance verification edge cases	High	Low	Exception-only review keeps human in loop.
Operations contractor hiring delay	Medium	Medium	Begin recruiting at Day 30, not Day 60.

09 - Next Steps

This audit gives BrightSmile everything needed to begin executing the 90-day roadmap independently. Below are three options for how to proceed, in order of decreasing self-service.

OPTION A

Execute the roadmap independently

Use this report as the playbook. Engage the recommended vendors directly. Renée owns rollout. Best for organizations with strong internal operations capacity. **Cost:** \$114K Year 1 (tooling only). **Risk:** Higher execution variance.

OPTION B

Vendor-managed implementation with Metageeks coordination

Metageeks coordinates vendor selection, contract negotiation, and rollout across the 90 days. We do not execute the vendor work — we project-manage it on your behalf. **Cost:** \$114K Year 1 + \$14K coordination fee. **Risk:** Significantly reduced execution variance.

OPTION C

Full Metageeks Enterprise engagement (R3 + R5 custom builds)

Metageeks delivers the custom AI agent builds (R3 hygiene recall, R5 treatment follow-up) end-to-end as Enterprise tier engagements, plus coordinates the vendor-led pieces. Full ownership of the AI layer. **Cost:** Tooling + \$60K custom build. **Risk:** Lowest. Fastest path to full \$612K leverage capture.

Ready to discuss next steps? Book a 30-minute roadmap review with Pankaj at metageeks.com/enterprise — we will walk through the report together and answer any questions. No sales pitch, no follow-up unless you request one.