

Ask the Expert

Jake Gulick,
Greyfinch Orthodontic Practice
Management Software





We want your patients to be able to self-service 24 hours a day, 7 days a week, 365 days a year. We want to make your clinic accessible all day, every day for things patients need to do that you don't need a human to do.

In this episode, you'll learn from Jake Gulick at [Greyfinch Orthodontic Practice Management Software](#). Jake started his 15 year career in the dental space at TeleVox Software. After leaving TeleVox, Jake was one of the first employees at Cloud9Ortho and led the sales team for four years. Jake decided to head in a different direction and helped create Greyfinch Orthodontic Practice Management Software.

Greyfinch continues to push the boundaries of practice management software with an integrated appointment widget for new patients and fully integrated electronic onboarding for new patients including signing all their documents. Greyfinch also has telehealth and HIPAA compliant two way sms built into the platform. Greyfinch has been the first to offer many revenue generating tools and continues to be on the forefront of innovation. Greyfinch strives to make software not only to help you run your clinic but also be a valuable tool for your patients as well.

I'm so excited to share with you this episode of "Ask the Expert" with Jake Gulick, who shares with viewers the latest advancements in orthodontic practice management software in order to help us serve our patients with excellence.

Dustin Burleson:

Cool. All right, welcome everyone. It's Dustin Burleson. We're so honored to have Jake Gulick on the program with us from Greyfinch Software. Jake, thanks for being here.

Jake Gulick:

Yeah, thanks for having me.

Dustin Burleson:

A lot of you have met Jake, or Greyfinch, or someone from the company at one of our events, but Jake is going to be speaking on a guest expert panel in Las Vegas in December, and I wanted to bring him on and let everyone meet you and talk a little bit about your background. So tell us how'd you get to where you are today and where'd you start?

Jake Gulick:

Yeah, good questions. It's been a fun journey, let's put it that way. So initially, right out of school I was selling marketing and things like that and brochures and really wanted to get into the software side of things because that's really my passion. And so had the fortunate opportunity to get a position with Televox Software, which is no longer Televox anymore, but a lot has changed over there since I've left. And so I was there for about four years, and it gave me a taste of the orthodontic and dental industry, and I loved it. I really did like it. And so at Televox I had the opportunity to meet Bret Smith, who ended up being one of the founders of Cloud Nine Software, and basically I became friends with him while I was at Televox and really wanted to go work with him over at Cloud Nine and help them do what they were

doing, which was really exciting to me to really help push orthodontics to that next level of technology.

There was no cloud based system out there and the orthodontists that especially had multiple locations really wanted something like that, to save them a ton of time and money and all the headaches that go along with dealing with all the servers and all that kind of stuff. So ended up leaving Televox to go to Cloud Nine. I think they had two customers when I joined. So I was one of the early employees, I think that maybe number one or sorry number two employee besides the owners. So very early on, true startup, boots on the ground, working your tail off, not making any money, that kind of a stuff. But it was a ton of fun, and I learned a lot.

And so I was there for about four and a half years, and I think when I left they had over 300 customers. So it was a lot of fun helping them grow that and to see the excitement in the orthodontics space over that. I had an opportunity while I was there to basically leave there to go start up a new practice management software and basically do it how in my mind I really thought that the practice management software, the direction where it should be going.

So not that Cloud Nine was in a bad direction but they were choosing to integrate with a lot of different companies. And what I was hearing in the space was that we don't want to integrate with a bunch of companies. We want to have a solution that can do these things just like my friend who is a doctor has one solution that does it all for him. And so knew that there was a demand for that

out in this space. And I think it's not just me but orthodontists say this as well but orthodontists and dentistry usually lag behind a lot of the other medical professions and specialties when it comes to some of this type of technology.

And so really had an opportunity to come to Greyfinch and get this started and do that. And so through a lot of hard work and long hours and early mornings and all that fun stuff, we launched really about five years ago but it was in beta more than anything else to begin with. So bless those clinics that allowed us to do that and to get through that because if any of you have ever done that, it's a lot of work and stress and things don't work and that could be frustrating.

And so it wasn't until January of 2020 we were ready to really launch to the rest of the world, you could say, into the space. And so January of 2020, we decided that's when we're going to start taking on new customers. This will be the year we start going to trade shows and all that good stuff. And then as we all know what happened. It's like great timing guys. So we still move forward with our plans minus the trade shows and all that kind of stuff. Well, but it really helped us focus on our current customers who we didn't have a ton at the time of course because we were just fresh out of the gate and had some beta testers and things like that.

But instead of focusing on onboarding new customers with our development resources, we really kind of shifted and helped our existing customers. I feel like we were probably the only software vendor that reached out to

their customers and asked them what can we do to help you during the times of COVID? And the big responses were telehealth, mass rescheduling of patients, and at the time we didn't have two-way SMS built into the system. And so we got to work and worked. I always joked that I think I worked more hours when all of our customer clinics were shut down probably than I did when they weren't. We were really trying to get this stuff up for them and by the time they would reopen because they needed to reschedule thousands of patients. So we able to deliver a solution where they were able to mass reschedule patients and we rescheduled thousands and saved thousands of dollars in staff time for our clinics by building that.

And we've extended that since then into our software where you can just text or email a patient, and they can click and schedule it on their own phone right from their device while they're sitting in the chair waiting for you to finish up your notes if you want. So we've been able to take that stuff that we did, the telehealth, we've expanded that now for new patient exams that people want to and that. And then of course we have full two-way HIPAA compliant text messaging. So we took all that, did all that, and continued to really just took that time, and we just have never let off the gas I would say in terms of feature development and new things. So it's been a really exciting... And of course, 2020 wasn't what we wanted it to be or had in our minds, but nobody knew about us and that was the hard part.

And obviously, I get it. Orthodontists were in a tough situation because you didn't know when they were going

to shut you guys down again. The last thing if I was an orthodontist would be thinking about would be switching practice management software. So I hear you, and I get it. But then after things got started to get a little bit more back to normal, we started making some traction, and now things are going great and we're really taking off. And it's been very exciting, and we're seeing a lot of great feedback and happy customers. So we're just trying to be a different solution out there. And the goal of Greyfinch is to build the software that's not just for your clinic but also for your patients as well. And I don't know that any other system has really taken that kind of philosophy or approach behind it.

And we want your patients to be able to self-service 24/7 365. We want to make your clinic accessible all day, every day for things that they need to do that you don't need a human to do. And you have that everywhere else with your bill pays and updating your autodraft information and making a payment online and scheduling an appointment. I mean, we could never do that in orthodontics without... For a long time, I think we were the first before even third parties were doing it. Now there's some third parties that are trying to do it and stuff, which is great to see. But really the practice management softwares have all the control over all that because they're the source of truth that they should be the one investing in that. But we're finding that they're not. So that's a great opportunity for Greyfinch.

Dustin Burleson:

Yeah, there's some great features I want to get to that I really like. But I want to highlight something you said



When you've been through a startup, you are more closely connected to the consumer than ever before.

because I love meeting people who come from a startup and you did it twice. You did it with Cloud Nine and then again. I read an article in the *Kansas City Star* this weekend. It's about this famous chef in town and starting his first restaurant. He is doing another location. He said, "I couldn't afford to pay anyone to do prep work. So at the end of the night at 3:00 AM, I would start prepping for the next day. I would pull out an air mattress, sleep on it. And the morning team would be coming in, and they would wake me up." Everyone's been there in a startup mode where I remember our first sterilizer, something went bad with it, and it was just this little tube. And Patterson's like, yeah this is like \$600.

So I took it all apart and had it all laid out on the floor. Like nine o'clock at night, and I'm driving to Home Depot to find something I think will work that's 38 cents or something. I was like, this will do. So the point is when you've been through a startup, you are more closely connected to the consumer than ever before. I mean, you know exactly what they want. You're probably the one

answering the phones or answering the emails. I remember early, and I was like, I'll answer the phones. And I learned really quickly that was a bad idea. "Welcome to Burleson Orthodontics." Some mom was like, "Is this *the doctor*?" I was like, yep. She was like click.

But you do learn what consumers want, and it's a really important point I wanted to highlight because so many businesses you come in, and there's 1000 employees where you come in. I think of a lot of my friends who came in and took over mom and dad's orthodontic practice. And it's just there and established, and you don't really appreciate the blood, sweat, and tears it took to figure out, oh, they want two way SMS.

I can tell you I'm not a programmer but I can tell you building that was probably not cheap, not inexpensive, not uncomplicated. And you did it in the middle of a pandemic, which is a great crucible to build new things. But I just want to highlight that I love that you came from startup world. So I just want maybe talk about some of the features that I know because a couple I want to highlight that I love that we didn't have before when we joined Rock Dental Brands. And we got to just by defacto bolt into an enterprise level software that runs I think 98 locations now. So in my head I was like if it's good enough for 98 locations, it's good enough for me.

We were still on a local server, you guys probably remember. It was really anytime I left town or anytime I was going to use a backup, do we have a backup in the safe in case the building catches on fire? There's like, I don't know, tens of thousands of patient records in this

little server that sat in one location that was really terrifying when the internet went down and we didn't know who kids were. Or when we didn't have a proper backup and we had two servers I think get hit by power surges.

So lightning strike kind of things. Anyways, let's talk about some cool features Greyfinch has that's bringing orthodontics into the year 2022 at the time of this recording.

Jake Gulick:

Yeah. No, that's great. And I think, you hit something that I want to highlight because I think there's a lot of confusion out there. Orthodontists are not IT people, most of them, right? Now we have some customers who are very heavy in IT, and they are very smart on all those things, but a lot of them aren't. That's not what you went to school for. That's not what your interests are. And so one thing to just highlight quickly is that Greyfinch is truly a web based cloud practice management software. There's a lot of practice management softwares out there that have cloud, and you could debate all day probably and read different articles and what that means exactly. But what they've decided it means is that they're moving your server off site. Okay. Sure, you're not having a server in your office anymore. That's great and that's a great step forward comparative to your point having lightning strike and surges and that kind of stuff and at least having it somewhere where hopefully they're protecting against those types of things with your server.



It's very important to understand the difference between a cloud based server which still requires proprietary software and a true web-based cloud practice management software which you can run on any device with a web browser.

Because your server's not going somewhere. It's not going away, it's just going somewhere else and living in a different spot on these other clouds. Really Greyfinch and Cloud Nine are really the two that have built the browser base, which means you can use it on any computer without installing your software. You don't have to have any sort of software. All the other clouds, there's still software to install, regardless of where your server lives. You can't go to your friend's house and have a patient call you, and go to their computer or their laptop or their iPad and pull up your software very easily. With Greyfinch, you can go to Chrome on iPad or Safari and use your software. It's as simple as that.

Dustin Burleson:

And on any computer, by the way. It works great on Mac. I still held onto my... We went all Dell, and I still held onto my little MacBook. And it works brilliantly on a Mac. It's very cool.

Jake Gulick:

That's right. That's what I use too. I'm a Mac guy too. So you use both. That's the beauty, like you said. You can have half PCs, half Windows. A lot of people, people that come from all Mac clinics too. They have to have a PC for their x-ray machine, but they like Macs in the clinic. Cool, we don't care. It works great and super seamless with that. So I just like to bring that up because it is a difference. You hear the word cloud, people think they're on a cloud, to each their own, whatever that means. But really make sure you understand the technology when you're looking at different softwares. And I'm of course, very biased because I came from Cloud Nine, which is the other browser based application out there. But when you look at what Google and Apple and Facebook and all these companies are doing, these large enterprise level, even Salesforce, you talk about big huge CRMs, and they're all browser based.

And so to me it's like especially if you're starting up your practice from scratch or if you're just switching softwares and you don't want to have to do it again, you're going to want to choose one that's using the latest technologies and the latest platforms. And I can assure you that Greyfinch, our technology's by far advanced compared to everybody else's out there from that aspect of it. So along with that then, like I said earlier, we really try to take the focus of patient facing types of software. So I'm going to go ahead and share my screen, and talk a little bit about some of the things that we've done with Greyfinch.

We are the very first ones to build a appointment widget we call it, that can be embedded directly into your

website if you want. It can be a light box, so a little popup. It can be a separate URL, it doesn't really matter.

And that gives you ultimate flexibility with this. And the goal is that clinics can increase their new patients scheduled because they can schedule 24 / 7 / 365.

And with Greyfinch when we implemented this appointment widget... So for example, we have this customer here, and they have click for a consult and it opens up the appointment widget. This is an option you'd mentioned Rock Dental brands earlier, they have it here and they have it as a light box where it opens up here. And we now actually have an option where they don't have to hit the schedule an appointment button. They can just go right into this question. And this is support Medicaid or private insurance if you do do different appointment types for that if your state. Or this question can actually be skipped as well. So in a state that there is no Medicaid, you don't have to have those types of appointments, you can skip this question even.

So it can really be customized to fit your clinic and what you want, how you're going to use this widget. So I'm going to pop back over to the demo site. So I'm not scheduling, especially Westrock, they do a great job of tracking the interactions with that kind of stuff. So I won't skew up their numbers on anything. But that's another great thing. If you work with a marketing company specifically, we can actually fire tags back to Google Tag Manager, and they can see your analytics and track how many patients for specific campaigns you actually got scheduled. And then if you tie that into our data



If you work with a marketing company, Greyfinch can fire tags back to Google Tag Manager, and they can see your analytics and track how many patients for specific campaigns were actually scheduled. Greyfinch is the only system that allows you to tie the patient ID back to your data warehouse, and you can actually see the true production numbers from each digital ad campaign.

warehouse, which we're the only system that has that, you can tie that patient ID back to your data warehouse, and you can actually see the true production numbers from those ads.

Dustin Burleson:

Actually yeah, I want to highlight Market Hardware loves this feature. And it's real and it's the only thing I want to... We toyed around with kind of bolt on third party, but all it was ever doing was kind of taking an appointment, and then we had to go in the next morning and find an open slot and squeeze it in somewhere. So this is live into the database. Market Hardware loves it. We love it. I joke with clients when I'm on stage that all of you came. So in

Las Vegas I'll say all of you came here on an airplane probably, and you all scheduled that airline ticket on your mobile device. And no one had to pick up the phone and call, like an orthodontic office, do you have a seat? Do you have seat 33B available? It's all automated, but somehow we can't figure out live scheduling for dentistry and orthodontics, but Greyfinch has. So I just wanted to highlight that this is very, very unique. And then, all right, let's take a look at it.

Jake Gulick:

No, you're right. And this is pulling directly from your schedule template too, because even sometimes if you use third parties, you have to have an intermediary database so you can manage that so they know what's available, what's not. With Greyfinch, it's literally nothing you have to manage. It just pulls right from your schedule. We even support virtual appointments through this too. So they can pick in person or virtual if you want. We have some customers that do that, especially with COVID when the pandemic was in full force, people weren't as comfortable going in. They still wanted to talk to an orthodontist. They could schedule virtual appointments.

And we see a lot of clinics are actually using that now for some of their remote monitoring calls. So if they're trying to do less chair time and more remote stuff, the cool thing about our virtual appointment is just the type. And you can mark any appointment as a virtual appointment, and it knows to send a link to the patient. They don't have to install anything, they just get a link, click it, and they're talking to you on the video. So you don't even have to use Zoom or any of those. So makes it seriously seamless for



With Greyfinch, you don't have to manage a third-party database for patient scheduling. The online scheduling widget pulls right from your schedule and we support virtual consultations through this tool as well.

the patient. So when they're scheduling, they're scheduling 24/7 365. We've seen an average of 60% increase in new patient exams scheduled when someone uses our appointment. Which is pretty impressive and pretty powerful, and it makes sense, right? Because guess what? 50% of those appointments are coming after hours when your clinic is close.

Dustin Burleson:

Exactly.

Jake Gulick:

52% is the actual number but it's coming when your clinics are closed. I mean just think about this Dr. Burleson. If you're a parent, I know I am myself, and my kids aren't quite old enough yet for braces, but when do we deal with that type of stuff? Usually I'm dealing with it at night when the kids are in bed. Maybe I'll have a TV show on or Monday night football on. I'm sitting there on my phone usually and reading about the different whatever it is. Maybe it's a speech therapist, maybe it's

just whatever that my kids need. And I want to be able to schedule it right then and there. And if I can't, I'm annoyed honestly. So if I'm between two people, friend A told me about this orthodontist. My general dentist told me about this orthodontist. They both rave and say they're amazing. I'm looking at both their websites. One of them I can schedule right now. The other one I have to fill out a form and play phone tag or something with that clinic the next day. Well, I assure you I know which one I'm scheduling, right?

And I'm 38 years old. But when we think about the age of people that are going to be bringing their kids in to orthodontics and what they had 10 years ago and what they're going to expect from an orthodontist from a technology standpoint, nobody's thinking about that right now. And I think that we're at that point now where we need to be thinking about that stuff. And those are the things that Greyfinch is building into our software now so that you have that stuff. So especially it's going to be expected in a few years. It's not going to be like, do you have this? If you can't two way text, if you can't schedule online, I'm like well, where are you? Who are you? I don't even know how to use this thing, right? Because it's not what they're used to.

So you have to be thinking about not just now in the present, we have to be thinking about what does your patient base look like in the next five years and what kind of technology are they going to be expecting? So along with that, they can schedule their appointment right online here, but then they're going to be prompted to fill out their medical information, so their health history



We have to be thinking about what does your patient base look like in the next five years and what kind of technology are they going to be expecting?

stuff. So it's actually going to be customizable here very soon. So that's one thing we've been requested a lot for is to customize this form. So in the next couple weeks that should be released where patients can or excuse me, clinics can customize all the questions that get asked. The cool thing and the difference between Greyfinch new patient paperwork and other systems out there, a lot of them say I have electronic paperwork, health history stuff, right?

Okay, technically that's right. But what does that mean? Okay, Greyfinch, it means that we actually fill the stuff into the patient's chart when they submit it. A lot of them you get this form, and then you have to take the data and then move it into the patient's chart. Well, you could do that 10 years ago with a fillable pdf. It's not really anything that special. And so we've now eliminated the need to do that work. And so I'm not going to go through the whole thing just from a time standpoint, but we ask all the questions. We even use Google's APIs for the addresses so it can auto fill in addresses, makes it real

good, clean, easier for the patient. It's all mobile friendly. Everything we do on the patient facing's mobile first. Because when they get this, let's say they don't fill this out ahead of time because when they schedule the new patient exam, they'll get an email asking them to do it. Of course, if they do it online they're going to get prompted but they just forget. You can actually text message or email the patient when they walk into your clinic, and they can fill it out on their own phone. Back when I was at cloud Nine, people would always be like, oh, can you just do a tablet and have a tablet, hand it to them and they fill out their paperwork. And I get why that was what people said back then. But now the stats are crazy high and especially in the age range of orthodontic patients, they have smartphones. And the research shows that they prefer to do it on their own device. So we do everything on your own device. You don't have to have tablets in the clinic for those patients if you don't want to.

Dustin Burleson:

Yeah, I want to highlight how clean this looks because this works on mobile, right? It also works on this laptop or desktop. So now that I'm out of the clinic, I was like I need to get my teeth cleaned. So got to call a friend of mine and previously I'd just have one of the assistants do it. So I called a friend. I was hey, I need to get scheduled. He's like yeah, just go online schedule. So he does have online scheduling but it's through a third party link. And the health history form comes up. And I sent a screenshot to him. I'm like dude, it's the whole form. You got to zoom in. Click yes or no. Do you have diabetes? No. Then zoom out and scroll down and zoom in. It's like a form fillable pdf.



A lot of practice management software companies say they have electronic paperwork, health history and informed consent, and technically that's right but what does that mean. The difference with Greyfinch is we actually fill the data directly into the patient's chart when they submit it. It's not an attachment or PDF you drag over to the patient record. If a patient states that they have a penicillin allergy, that is entered directly into the record and a medical alert is activated.

It should be like this. This is really smart. One question at a time, big chunky buttons you can click with a thumb.

And so this is brilliant. And because if you don't, you're not going to see the results. And then I'll say one more thing, and I'll shut up is that I don't know how much data I'm allowed to share with Westrock but when you guys turned this on, in our clinics we saw our new patients go up significantly because of the point you highlighted. That moms and dads are doing this during lunch, they're doing it after hours, you're doing it on a Saturday, on a Sunday. Sometimes we see those come through 3:00 AM on a Saturday. I don't know. That's when they were up and available. Maybe a mom, was a nurse working a late shift. I know that even if, because we have the data from

Market Hardware, even if they try to do this on your website or call you, 40–45% of the time, if you're not recording your phone calls and you don't have the data, you're missing those phone calls during office hours anyways.

So if you're open, you still can't capture them all. So I just love that this is super easy for people to do on a device any time of day, and it's designed right. And to Jake's point, it goes straight into the software. Our old stuff before Greyfinch, we would have to then put into the patient's chart as an attachment. And that's not the same. You really don't have good data. So if you want to know what percent of our patients are on any sort of medication that we might want to be aware of that might increase the risk for grinding, you have no idea with the old software. But with this you could run actual real data and real reports on what percent of our patients have a latex allergy, what percent of our patients have autism, and need to be scheduled at different times of the day, things like that. So yeah, I see all it goes...

Jake Gulick:

It goes right into here to your point. And that's such a big thing because if they mark that they have liver disease for example, it automatically creates this medical alert. You don't have to do anything. And yes, to your point you can report off of it too. So having it go directly to the software is so different. And there's a competitor out there, and I've seen their new patient paperwork and it's exactly as you described. I'm like, how do you do that on mobile? You can't. And that's not what you should be designing anything for. And I give our UI designer, this isn't my

design, this is one of our UI designers, and he found patterns in research.

And I know for a fact that we do more than other companies because I've been in other companies that do this, and we really take this seriously and test. And we have a group of offices that are our beta offices that give us a ton of great feedback that are subset of our customers. And we really try to make sure that we're not just making a feature to check a box that says yes, we do that, but maybe it's not very usable or that practical. We need it to be usable and practical or what's the point of doing it. And so we really got a point in everything that we do.

Dustin Burleson:

I love that little feature. There's a million features. We could spend a whole month going over this. But previously if someone filled out that they had an allergy to something like an allergy to penicillin, we had to look for it on the chart. And then we had to go in manually and click the medical alert and then type it in correctly. So you had to be able to spell penicillin, which a lot of people at the front desk that are brand new maybe aren't from medical. So you're like, what is that allergy? I think they're trying to say penicillin. So that's a great feature. The patient clicks it, and moms know. If a mom's got a little baby with a penicillin, she's going to let you know about it. You don't have to worry about the staff missing that, which is really, really cool.

Jake Gulick:

That's right. And we even track who updated it lasts and all that kind of stuff because they can update it from the



We really want to focus on the patient experience and even if we have five different softwares that talk to the practice management system with the goal of enhancing the patient experience, those five third-party softwares are not talking to each other, so the experience and outcome are not optimized in the same way we can optimize them with Greyfinch.

patient hub too, which I'll show you guys in a second as well because that's an important thing too for patients interaction. So the goal is that patient experience as I talked about before, not just a software for your clinic, that's important. But we also need to think about the patient's experience. And people say, well I can just use the software and have five different third parties. And I'm like, if that works for you and you're happy with everything and it's streamlined and all that kind of stuff. But for a majority of the people I talk to, they're looking to get away from that because guess what? None of those five softwares talk to each other either. And they may talk to your practice management but they don't talk to each other. And so because we have all these things they can all talk to each other and know what's going on, and we

can help control those types of things. So we really think about that. So the patient has a great onboarding experience. They come up, they show up to your clinic. They can do self check in, you can check them in. We even have alerts that if they owe you money, it stops them and stops you from checking them in. We saw collections increase greatly when we had that feature and people had it turned on because you're not now reliant on Jenny at the front desk to run a report every day on who's scheduled and who owes me money.

Why are we running that report every day and printing off and her wasting paper and trees and all that kind of stuff when the software knows who owes you money for the day? So turn that on and when you check them in, it prompts you if they owe you money. And you can collect it right then and there, and you're now not relying on the assistant, maybe seeing an indicator in the back, you're capturing that right then and there and you're not having to print something off every day.

Dustin Burleson:

It's really polite as it was really well worded how you guys did it for our clinics. It was really, I was like, oh is this going to be confrontational? It was someone with a degree in behavioral psychology wrote the sentence basically like, hey, please check in at the front desk. But it said it really nicely so that we could have that conversation privately, not right at the front where everyone's checking in. Yeah, it was very, very clever.

Jake Gulick:

Yeah, for sure. So when that patient checks in, one of the things that, of course you have your treatment card and all that stuff. We're actually in the midst of redesigning our treatment card. So it's going to look completely different soon in a good way. We've taken a lot of feedback from our doctors and our users and really made it better. No use talking about that at this point, because I want to focus on the patient side of things, but from a treatment aspect, just so you guys know, we are. If there's any Greyfinch users that are listening to this, so we have some really exciting stuff on the treatment card coming soon too. That we basically redesigned everything. And so there'll be a lot of changes based on feedback. So that's exciting for us. But what you would do is you typically do your diagnosis, your exam.

So we have all that similar, most softwares all have that stuff. No use boring anybody with that. And then you pick your treatment plan, and Greyfinch actually lays out all your appointments. And this is where I was saying too, you can even have virtual appointments in here if you want. So if you're doing clear liners and you're like, ah, I don't need to see them every eight weeks, maybe I do a video call at that point, and then see them in the chair again. You can build all that stuff in here. This is all customizable. You can customize it now. You can customize it during treatment. Of course, this is just your template. Then once they do that, your treatment coordinator would go ahead, and they're going to add insurance if they have insurance in here or add whoever's paying for it. And so from here we do support split contracts that people do that type of stuff as well.

That's usually a question. But really what I want to show you here is this treatment coordinator can leverage this tool to get them to say yes to treatment. We fully support different intervals too. I give OrthFi a lot of credit. They were the ones that kind of pioneered the whole different intervals because in orthodontics software we were just tied to monthly. There wasn't other options. But really when they looked at this and their data shows this, that if you're more flexible with it because maybe people prefer to have their draft done on their payday, right? Because it's easier for them to budget and stuff like that. Well, it's good for you too to need your money when they're going to have money in their account.

So we support those different payment intervals with Greyfinch. There's no special setup, nothing. Also, one of the things that people always said before was, well, then I got to remember to go run it every day, I have all these different payment plans.

Well, guess what? With Greyfinch, you don't. You turn it on, and it runs every single day automatically at 4:00 AM for you. You never have to, even on the weekends, the software's working for you running your auto drafts. So you don't have to worry about that with Greyfinch either. But the cool thing is the treatment coordinator can sit here and say, okay, work with them. They can lock and all this kind of stuff. But that patient, I need to go home and think about it. And so what we've recently built and has launched is the ability to text or email the patient away for them to go out and fill out their health history stuff... Or excuse me, not their history, their treatment plan stuff. So Dr. Burleson, you probably haven't seen this yet either



*Your practice management software has all the data.
Why should you have to use a third party for this?*

because it wasn't live, but I do need to change the URL on this to demo quick.

And then, let's see here, it'll load. So they put in their date of birth. So our date of birth made with a unique token that we have to make sure we're HIPAA compliant with everything. And we made a mistake. We're not perfect. We know that and we make mistakes, and we've learned from those and our user behaviors. Initially when we first did our medical form, we made the patient create an account to fill it out. That was a bad idea. We were trying to be ultra secure and all that, it just wasn't working. So we changed it up and used date of birth and unique tokens instead, which makes it so much easier. And the feedback was amazing from clinics on it and patients. So we do the same thing here. So patients come in here and get a text or an email. There's third parties that do this, right?

But again, your practice management software has all the data. Why should you have to use a third party for this? And the cool thing with Greyfinch is you can't do with a third party is we can take you all the way through, so you can have predefined payment plans. When we talk to the

people about this, they said Jake, sometimes giving them a bunch of choices is not good. So maybe you have three or four choices, and they can just pick one. Cool, we'll support that. We support up to I think five pre-defined choices here that you can set up in the admin area but if you don't want to, they can customize it. Now there's rules around all this stuff. Maximum payment plan length, minimum down payments, even payment frequency you can control if you don't want to do other option besides monthly. You even can control the down payment and length by treatment.

We have a concept called treatment plan group. So with your treatment plans, you may have five different aligner treatment plans and then five different bracket treatment plans. So we attach these treatment plan groups to those treatment plans so you'd have aligner in that. So if you want to ask for a bigger down payment for aligner patients for lab fees, I know some clinics like to do that. You can. We can set that up whether or not, maybe's it's 1500 for aligner cases or the cool thing is we can get as creative as we need to. We just work with the customer and understand what they want to set up, and then think about the best way to set these up so that patients can't, you know what I mean, do something outside of what they want them to do.

Dustin Burleson:

That's cool. That's very cool.



With Greyfinch, you can text or email the patient or parent their contract details for signature, down payment and monthly recurring financial details. The software will gather a secure signature, start the contract and then the patient can pick their next appointment, because Greyfinch knows what the patient is supposed to come in for next. No other third party can do this because they don't know the next appointment nor do they have live access to the patient schedule and ability to push into the database. So we're taking the patient all the way through the entire new start experience.

Jake Gulick:

Once the patient says yeah, this looks great, they're going to click continue. And they're going to come in here, and then they're going to accept it as well. And then the next screen is it's going to load their contract on the screen for e-signature. So this is completely customizable. They can come in here and they can electronically sign it with their finger. They can type it or upload a signature. I bet no one's ever used the upload. And then they just have to click use last signature on each one similar to your other sign out. Now it's important to note Greyfinch built this. It's our own sign app. We didn't integrate with a third party so we can do whatever we need to do. We even

support check boxes and radio buttons if people need them like to check this or that and that kind of stuff in this sign app.

So sure maybe it's not as feature rich as a HelloSign or a DocuSign or something like that. But it doesn't need to be for what we're using it for in what the clinic's demands are. So we ended up decided to build it ourselves. We have control over it, and we don't have the cost associated with ongoing costs with those types of companies that we'd have to pass along to our customers. So once they get that done, they're going to come in here and it's going to prompt them to do their down payment. So they've signed their contract. They'll do their credit card and or ACH or in office. You control this as well. If you only want down payments to be credit card, you can turn these two off. If you only want it to be bank account, ACH or credit card, you can also turn off in office.

But we had people say that they wanted an in office option. I'm going to pick that just to skip through this. Of course, I didn't copy and paste any sort of the fake credit card number so I won't be able to get past this screen. But you can also control this. This is setting up my auto draft for that patient. So we've paid our down payment, now they're setting up our auto drafts. Once I do that, and again I don't think it's going to let me go by because I don't have anything. I think that gets me by. We'll see. I don't know.

To get into scheduling. Yeah, it did, it worked. There we go. So now it's going to pull up, and it should be pulling up my schedule here in a second. There we go. And so we

come in here, and it gives me my available options. It's the demo site. So that's why it took a second because there's so many appointments available on these dates in the future, but typically it should load a little faster. But what you're going to do then is pick your appointment because we know what you're supposed to come in for that start appointment, right? No other third party can do this because they don't know that. So we're taking you all the way through. We're scheduling that patient, that appointment and we're done, and that's it. And so we're all done. You actually can also have it invite them to the patient hub.

There's a toggle to turn on and off. So what confirmation screen basically do you want them to see? So now we come back here and this patient, if we reload this, they're done. The treatment plan, there's that appointment that I just scheduled. We're all done and ready to go. Now that contract hasn't started yet. So it'll start when they come in for this appointment because you can mark those as start appointments as well. So the contract's going to auto start. Now it's important to note though that if we didn't do that, if the patient was ready to start while we were there, you can actually text message them the contract for e-signature while they're sitting in front of you as well. So it's not just that you have to send it that way. We did that first, and then we use that tech that we built there in the workflow that I just showed you.

And so I rarely get calls from just random customers about stuff, once in a while. But when we introduce the e-sign stuff for them to just sign their contracts, I was getting calls from clinics saying this is so awesome.



Most offices don't have the tools. And in leading into December's Treatment Coordinator Bootcamp, we're going to teach attendees how to get patients to ethically say yes. How to follow up with them, what leads into the office, building trust and establishing convenience. And this is a huge component of it. It's not just what that treatment coordinator says in the room. It's the tools he or she has to help patients say yes.

Patients think it's so cool they can just sign their contract on their phone because you just text it to them, and they just do it all, hit submit, and it's in Greyfinch. So anyhow, it makes it super seamless. It makes you look like a very tech savvy office as well, which is an important thing.

Dustin Burleson:

Because they always need it for their flex spending or their HSA, whatever. I mean, now they've got every other app is like that from insurance to your tickets to a local concert. I mean it's all on your device, and now this is congruent. It helps say yes. I think about, maybe it's because it's baseball season and we're in the post season now, but most orthodontic practices putting their TC in a room with literally, you'd be shocked how many places we go to. They literally put them in a room with a piece of

paper, and they're filling out the down payment by hand and then shoving it to the mom. This is high tech or that this is a good idea to say here's your option. Say yes or say no. Well, this provides a million different either or scenarios. It'll be putting up a professional baseball player at the bat, at the plate with a plastic wiffle ball bat and say, go ahead, go hit a home run.

Most offices don't have the tools. And in leading into December's [Treatment Coordinator Bootcamp](#), we're going to teach the attendees there how to get patients to ethically say yes. How to follow up with them, what leads into the office, building trust and establishing convenience. And this is a huge component of it. It's not just what that treatment coordinator says in the room. It's the tools he or she has to help patients say yes. And then the follow up and the data and reporting. So I love this because as you said, it controls it all the way through. There's no third party plugin. Then when you get to the sign up for payment thing, it's going to know exactly which appointment is next and based on your treatment plan and the software. It's really, really slick. Or that you need a little higher down payment or that you only do ACH for clear liner patients because you don't want to charge back or a credit card dispute because the trays didn't show up on time. That's today's technology. And finally we have it for orthodontists. So I mean it's super exciting. And this was all new since I got out of the clinic, but it's great.

Jake Gulick:

It is. It's actually getting rolled out right now. So we're onboarding our first few clinics right now. We like to roll

that type, especially something that's big slope to make sure there's nothing that was getting missed. And we have a good group of customers that are willing to help us with that. So we'll see. Everybody else will start seeing it likely in November rolling it out to the masses. There's some setup that needs to be done. So this is not just like, hey, there's a new button over there you can click. There's like, we need some thought behind it. So we'll be reaching out to actually all of our customers to help them get this set up just to make sure that they're not setting it up in a way that's going to make the doctor mad because they didn't take the right down payment and that kind of stuff. So we want to make sure that it's done correctly.

Dustin Burleson:

This patient wants to pay a dollar a month for 500 months.

Jake Gulick:

I've seen a lot in my years and I was looking through one conversion one time and looking through abnormalities and saw a payment plan extended out for no joke, it was over 15 years. And I was joking, I was like, it's like a mortgage. Do your braces or a mortgage?

Dustin Burleson:

How expensive are these braces? Yeah, was that an adjustable rate, was it a fixed rate?

Jake Gulick:

Free interest, they were.



If you give your treatment coordinators the ability for new patients to schedule online, they're much more likely to show up. If they can't get the appointment they want or they have to call after hours, they're probably going to go to a competitor.

Dustin Burleson:

Wow. Yeah, no thanks. That's awesome. Yeah, I mean, we're laughing but it's a good point. If you don't know what you're doing, it's got to be set up the right way. So very, very cool. I know our members are going to be so excited to see you in Las Vegas in December. I know we could spend all day talking about Greyfinch. This is the one really, really neat feature I wanted to highlight and the new patient online scheduling. If you give your treatment coordinators the ability for new patients to schedule online, they're much more likely to show up. If they can't get the appointment they want or they have to call after hours, they're probably going to go to a competitor. And OrthoFi confirms our data. If they're making those patients wait more than 21 days, the no-show rate just goes through the roof.

So we love the online scheduling feature and now we love that once they get to the office, we have a process to keep up with them and to automatically just send a text over to mom. She can sign right there in the chairs is really, really slick. I guess, I know we're going to lean on you and a couple other experts in the space. Dr. Dake will be there also. Jamie Reynolds will be there from OrthoFi and Marla Merritt from OrthoBanc, just a lot of good patient data. I guess any highlights on what we can see in December? Obviously, you'll have some data on this tool, which I think is going to be very exciting. But any exciting trends? I know we want to talk about them today, but some data we can bring to the group in December?

Jake Gulick:

So we're also working on a... So I think that not only is it important for you for new patients and you have that flow and the data and the 60% I mentioned we're seeing on average of an increase in new patient exam scheduled. I mean that pays for Greyfinch for most of our customers all the time, all just right there. But ultimately when they also become a patient then and the tools to get them to be a patient, this tool is great to get them to be a patient. But what happens if they don't sign up right now? Who's doing that follow up? And so we're actually testing right now. We have a lot of stuff at the 10 yard line that's going to be coming out that I'm excited to have some data for you at this meeting too.

We should have some good data behind it. But where you can mass text those patients that no showed for their start appointments or for their new patient exams and getting them in and building on that. Now to be fully honest, we

don't have it built where it continues on like a CRM would, but that's where we're headed with it, and that's our goal with it. But we're like, well, we could release this now and they can start using it now and they have nothing versus something. It's not what we all envision it to be, but we can kind of get you there and release it. So that's going to be released really soon. But then also when we think about existing patients, making sure that they stay scheduled. They stay on track for treatment and they make payments to you. So this tool will also allow you to text and mass email those patients as well.

We've processed over millions of dollars in our patient hub so patients can go online and make payments and update their autodraft information. No other system to my knowledge, allows that either. So you'll be able to auto text patients after their card declines. Go here and update your information. Well when they're updating it, and they make a payment at the exact same time. So those types of things that I'll be getting some more data behind as well just so that you guys can see that kind of stuff because I haven't looked at it in a while because the hub's been out for a couple years now. And so I haven't had the need to go back and look at it. We did right away and saw huge. But it's pretty fun to watch those number of payments because the collections when Greyfinch is designing stuff, of course ease of use, all that kind of stuff is important. But when you think about new features and how can we help the clinics, it's how can we help you get more starts, right? More revenue. But also it's great to have starts in production but unless they're all paying you in full, you also have that problem of collecting your money on the other side of it. So how can we help you get more



Also when we think about existing patients, making sure that they stay scheduled. They stay on track for treatment and they make payments to you. So this tool will also allow you to text and mass email those patients as well.

collections, more money in the door as well from that aspect of it. So those are two really big drivers that we're really pushing and automating, trying to automate as much of that type of stuff. So our customers are going to see a lot of cool stuff on that over the next three to six months as well if it's going to help them. And really honestly, from what most people tell me when we talk about that change the game in terms of practice management software because nobody's doing that kind of stuff.

So we're real excited about the future in the next few months and the next six months, less than that really. And I'm excited to share some great numbers with you guys in Las Vegas and meet a bunch of people too and try to help them, even if they're not Greyfinch customers. I talk to anybody. I'll help anybody. It's try to do the right thing and even if they're not ready to switch for whatever reason, they may have a friend that's interested. So it's exciting to just go and meet and talk to people and learn what their struggles are because that's how we also make the software better.

Dustin Burleson:

Yeah, that's the spirit of the group is just kind of moving the profession I think in the right direction and forward. And this is another great point. I mean I could talk all day. All these things coming from one central location builds trust in the patient. When you've got some third party app, now there's a separate text thread for that, and there's a separate text thread for checking in, there's a separate text thread for filling out your new patient health history. It gets confusing to the consumer. Is this really the doctor's office? Is this phishing? Is this spam? So we love that all this is a central hub. It's really, really cool. So I know there might be some people listening and go, hey listen, I'm either already a Greyfinch customer or I want to learn more about becoming a Greyfinch customer who will be joining us either in Las Vegas virtually or in person. In the meantime, how can people reach out to you and kind of learn more about Greyfinch if they're interested in making that switch ahead of December?

Jake Gulick:

We have a really easy way to [schedule a demo or a call on our website](#). We try to not only make the philosophy of make it easy for your patients, but make it easy for people that want to talk to us as well. So we have a link on our website that you can schedule a time to talk. It's www.greyfinch.com. So very easy. Or you can give us a call too. Our phone number's on there, or you can email sales@greyfinch.com. Any way you want to get ahold of us we're here. We also have a chat too. So a lot of different avenues to reach out to us if you have questions or want to learn more, we'd love to talk to you to see. And I always

tell doctors too, just so you know, we're not here to sell you on Greyfinch like a normal you'd think in that sales. We really want to help you. We don't want you to use our software if it's not a good fit because then nobody wins. So just know that our philosophy and our approach is probably a little bit different than what you may have experienced in the past with other companies. And we really want to help you. And if we see any red flags, we're going to bring it up to you, and tell you we don't think you're a good fit because of this reason. And I think a lot of people appreciate that. And maybe it's then they have to decide at that point then if it's the right decision. And self tracing was one of the things that we didn't used to have. And so if that was a big deal for people, it's like, we don't have it. So you either not switch to Greyfinch or you're going to have to use a different software that's short term, right? Well now we have it. We actually have AI self tracing, so it auto traces. So we're closing the gap on some of those things. But being that we're younger, we still want to make sure that it's a great fit for your practice, and it's going to help you and not hinder you.

Dustin Burleson:

Awesome. We will include those links to learn more about Greyfinch at the bottom of this video. So grab the transcript and click those links. And then we're so excited to have you guys out to Las Vegas in December. So Jake, thanks for being here.

Jake Gulick:

Thanks so much. I appreciate it. And we're excited to see everybody. Bye-bye.

Ask the Expert

Jake Gulick, Greyfinch Orthodontic Practice Management Software



SCAN ME

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EXPERT**

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