

THE HIDDEN REVENUE

PLAYBOOK

3 Steps to Unlock Patients, Profits & Peace of Mind

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1 Introduction: Why Growth Is Already in Your Practice

My name is Flint Geier, and I am the President of the Scheduling Institute, the #1 training and consulting firm for patient-centric doctors who want to grow without burnout. I'm also a strategist, speaker, and podcast host, passionate about helping doctors and their teams achieve what I call The Gold Standard of patient care and profitability.

A former collegiate football player, I approach business the same way I approached the field: disciplined, competitive, and relentless about improvement. My job is to help doctors win, not through hype, but through proven systems that deliver results.

Why This Playbook Matters

Every practice wants more patients, more revenue, and more peace of mind. But here's the truth: most doctors already have everything they need. It's just hidden inside the practice. You don't need another marketing campaign or gimmick. You need to unlock what's already there: the people, processes, and potential that are underperforming.

I've spent years inside real practices, listening to phone calls, training teams, and running diagnostics that reveal where money leaks out every day. What I've found is simple. You likely have hidden revenue disguised as:

- Phone calls that never get answered or converted
- Loyal patients who love you but never refer
- Consults that stall before trust is built
- Teams that don't consistently reinforce your value

This playbook reveals how to uncover those opportunities, turn them into profit, and lead your team with clarity and confidence.

YOUR COMPLIMENTARY BLIND SPOT ANALYSIS

Along with this playbook, our team is preparing your Blind Spot Analysis. It shows you exactly where your practice is losing new patients and profits, and what to fix first. Your results will arrive by FedEx.

FAST-TRACK IT: SCHEDULE YOUR CALL

2 Who We've Helped & What We've Achieved

For nearly three decades, the Scheduling Institute has been the trusted growth partner for thousands of private practices across dentistry, orthodontics, dermatology, med spas, ophthalmology, and beyond.

We help practices that:

- Want predictable, sustainable growth
- Have a team willing to learn and implement
- Value patient experience as much as production

What That Looks Like in Numbers

11,674+
practices applying our systems

36,605+
in-office trainings delivered

300,000+
team members trained

20,345+
front desk professionals certified in our 5-Star Process

When doctors and teams follow these systems, they see measurable, trackable results:

- Increases in collections
- Higher case acceptance
- More referrals
- Stronger patient retention

Your next level of growth is already sitting inside your practice. Our job is to help you unlock it.

3 The Real Cost of Missed Opportunities

Every day, your practice either earns or leaks revenue. The difference comes down to one thing: execution.

Phone & Call-Intake Misses

Many practices don't realize how many calls go unanswered or are handled poorly until they listen to recordings or see objective audits. These missed or weak calls cost more than just appointments. They cost trust, reputation, and long-term patient value.

Patient Experience & Retention

Most practices unintentionally deliver an experience that feels transactional. When they do, patients don't stick around, and referrals dry up. The alternative is what I call the Gold Standard patient experience: connection, clarity, and consistency.

Case Acceptance & Collections Losses

Growth in a practice comes from three areas: more new patients, more frequency of visits, and larger revenue per patient. Most doctors focus too heavily on the first, neglecting the latter two. Case acceptance isn't just about the consult. It begins the moment a patient calls.

4 Step 1: Maximizing New Patient Opportunities (Phone & Intake Systems)

Phones are the single biggest revenue driver in any practice. Yet, for most teams, training on phone conversion is minimal or nonexistent.

Common Pitfalls

- Calls going to voicemail during office hours.
- Team members answering in a transactional tone instead of building trust.
- No clear scripting or accountability around converting interest into appointments.

The Fix

- Answer live, always. Voicemail and missed calls kill momentum. Every patient deserves a conversation.
- Implement 30-second trust scripts that create connection immediately.
- Role-play regularly with your team to build confidence.
- Track call-to-appointment conversion rates so you can measure improvement.

> **ACTION STEP**
>
> Secret-shop your own office this week. Call at different times of the day. Would you book with your own team if you were the patient?

YOUR BLIND SPOT ANALYSIS STARTS HERE

Your complimentary analysis includes a Mystery Call Audit: an unannounced call to your office, scored against our 5-Star standards, so you can hear exactly how your team handles a new patient.

FAST-TRACK IT: SCHEDULE YOUR CALL

5 Step 2: Patient Retention, Referrals & The Gold Standard Experience

> **New patients are expensive. Referrals are free.**

Yet most practices don't have a structured system for encouraging word-of-mouth growth.

Why Referrals Matter

- Referred patients trust you before they meet you.
- They convert faster and stay longer.
- They're less price-sensitive because they're coming in with confidence.

How to Make Referrals Happen

- Build "wow moments" into your patient experience that spark conversations.
- Create a referral recognition program (thank-you cards, small gifts, or spotlighting families).
- Train your team to ask for referrals at natural moments, not in a pushy way.

ACTION STEP

This month, launch a "Thank You for Sharing" program. Each time a family refers, celebrate them publicly and privately.

6 Step 3: Increase Case Acceptance & Collections Through Trust & Team Alignment

You can generate all the new patient calls in the world, but if consults don't convert, you won't grow.

The Common Pitfall

Doctors think consults are about presenting treatment. In reality, consults are about building trust. Patients say yes when they feel heard, understood, and confident in you.

The Fix

- Shift from "telling" to asking discovery questions.
- Create a structured consult framework so every step builds confidence.
- Train your TC and clinical team to stay in sync, with no mixed signals.

> **ACTION STEP**
>
> Audit your last 10 consults. How many ended in yes? Document where trust was missing and role-play those scenarios with your team.

7 Your Complimentary Blind Spot Analysis

This diagnostic is my tool for revealing where revenue is leaking and how to fix it fast. As a thank-you for requesting this playbook, your practice is receiving one at no cost.

What It Is

- The 5-Star Challenge assesses your practice across five key areas: phone intake, initial patient experience, referability, team performance, and patient centricity.
- A Mystery Call Audit involves an unannounced call to your office posing as a new patient, scored against our proven 5-Star standards.

What You Get

- A score showing how you stack up.
- A recording of a real call for training purposes.
- A report with actionable insights on what to fix and where you're losing patients.

What Happens Next

We'll keep you posted by email as we prepare your analysis, then send your results by FedEx, confidentially, to your practice.

WANT YOUR RESULTS SOONER?

Schedule your Blind Spot Analysis call and we'll fast-track your analysis.

SCHEDULE YOUR CALL

8 Case Studies: Real Practices, Real Gains

Here's an example of typical outcomes:

Practice Type	Before Intervention	After My Systems Are In Place
Small Town Dentist	Low referral numbers, weak phone handling, modest new patient count	Higher referrals, stronger phone conversions, improved collections
Orthodontist	Heavy marketing but poor consult conversions, phones missing opportunities	Phone scripts improved, consults converted better, ROI on marketing improved significantly

9 Building a High-Performing Team & Strong Culture

Revenue isn't just numbers. It's people. I believe in placing a strong emphasis on team alignment and culture.

Our Core Values (that you can take)

- **Be Positive.** Attitude sets the tone.
- **Have Fun.** Energy is contagious.
- **Be Ethical.** Integrity builds trust.
- **Everyone's in Sales.** Every role impacts growth.
- **The Greater Good.** Put the patient first.
- **Be Results-Oriented.** Track and be accountable to results.

Practices to Develop Culture

- Regular training and development for your team.
- Recognition and celebration of wins.
- Metrics that matter: not just financials, but phone responsiveness, referral rates, and consult acceptance.

10 Your Growth Roadmap: From Today to 90 Days

Time Period	Action Items
Week 1	Secret shop your phone system and gather baseline metrics.
Weeks 2–3	Train front desk on 5-Star standards. Role-play scripts. Track missed calls. Assess patient experience with the Gold Standard Checklist.
Weeks 4–6	Improve cultural touchpoints. Launch a referral recognition program. Align team around messaging and value. Train on case acceptance.
Weeks 7–9	Compare new metrics with baseline. Adjust scripts. Hold team check-ins.
Weeks 10–12	Refine based on audit results and patient feedback. Celebrate wins. Build consistency into all systems.

> **TIP**
>
> Your Blind Spot Analysis results make a strong Week 1 baseline. Use them to decide where your team starts.

11 About The Scheduling Institute

Since 1997, the **Scheduling Institute** has helped over 11,674 practices and 300,000 team members worldwide increase profitability, retention, and patient satisfaction.

Our mission is simple:

Help doctors grow confidently by unlocking the potential already inside their practice.

We believe growth is human-powered. The right systems and training turn potential into predictable results.

Conclusion

You now know where hidden revenue hides, and how to uncover it:

1. Turn more new patient calls into scheduled appointments.
2. Improve patient retention and generate more referrals.
3. Increase case acceptance and collections through trust and team alignment.

These are the systems that separate average practices from unstoppable ones.

Let the data show you what needs fixing. Commit to the steps above. Track progress. Build your patient experience with clarity, consistency, and care.

Growth is already in your practice. It just needs to be uncovered.

YOUR NEXT STEP

Your complimentary Blind Spot Analysis is on its way. Watch your inbox for updates, and your results will arrive by FedEx.

FAST-TRACK IT: SCHEDULE YOUR CALL

Thank you for investing time to read this playbook. My hope is that it provides tremendous value to you and your practice. I look forward to hearing from you soon!

Flint Geier
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QUESTIONS ABOUT YOUR PLAYBOOK OR ANALYSIS?

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