

The Unscheduled Treatment Recovery Sequence

The 222 Follow-Up System

Recover More Treatment. Improve Patient Health. Increase Practice Production.

A practical implementation guide for dentists, office managers, treatment coordinators, and scheduling coordinators.

Why Every Practice Needs a 222 Follow-Up System

Every day, patients leave dental practices with diagnosed treatment that remains unscheduled. While it is easy to think of this as lost production, the greater concern is that patients are delaying care that has already been determined to be in their best interest. The 222 Follow-Up System provides a simple, organized process for reconnecting with those patients through thoughtful, timely communication that demonstrates concern—not pressure.

Many patients fully intend to schedule treatment before they leave the office. Then life intervenes. Work becomes busy. Family obligations take priority. Financial questions arise. The urgency they felt during their appointment gradually fades. Without a consistent follow-up process, many patients never return—not because they rejected treatment, but because they became distracted.

The purpose of the 222 Follow-Up System is to bridge that gap by creating consistent communication that helps patients receive the care they need while improving the practice's treatment acceptance and production.

Objectives of the 222 System

When implemented consistently, the 222 System helps your practice:

- Improve patient health by encouraging completion of diagnosed treatment.
- Increase treatment acceptance through consistent follow-up.
- Recover production that might otherwise remain unscheduled.
- Deliver a consistent patient experience.

- Create accountability through a repeatable process.
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The 222 Timeline

When	Objective	Primary Communication
2 Days	Reconnect while the appointment is fresh.	Personal phone call or email
2 Weeks	Remove barriers and answer remaining questions.	Phone call, email, or letter
2 Months	Preserve the relationship with a gentle reminder.	Email or letter

Each communication has a different purpose, but every interaction should communicate the same message:

- We appreciate you.
 - We are concerned about your health.
 - We are available to answer your questions.
 - We are ready to help whenever you are ready.
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TTI Best Practice

Patients should never feel like they are being "chased." Every follow-up should feel like a natural extension of the excellent care they received during their appointment.

Building Your 222 System

The 222 System succeeds because it is a **system**, not an occasional activity. Every patient who leaves without scheduling recommended restorative treatment should automatically enter the follow-up process.

Step 1 – Run Your Unscheduled Treatment Report

Review your practice management software regularly to identify patients with diagnosed but unscheduled treatment. Most systems allow reports to be filtered by provider, procedure, date, or outstanding treatment, helping you understand the scope of the opportunity.

Step 2 – Assign One Person Accountability

One individual should own the process.

Although several team members may participate, one person is responsible for ensuring every patient receives the appropriate follow-up.

Responsibilities include:

- Reviewing reports
- Organizing treatment plans
- Completing scheduled follow-ups
- Recording patient responses
- Tracking appointments scheduled through the system

Clear ownership prevents patients from being overlooked.

Step 3 – Organize Treatment Plans

When a patient leaves without scheduling:

1. Print a copy of the treatment plan.
2. Place it in your 222 tracking binder.
3. Organize treatment plans by follow-up date.
4. Update the patient's status after every contact.

A visible tracking system helps ensure every patient progresses through the process.

Step 4 – Prioritize Patients

Use a simple color-coding system to guide your team's efforts.

 **Green**

Patients who appear likely to schedule treatment after a reminder.

Yellow

Patients who expressed hesitation or still have unanswered questions.

Red

Patients who appear unlikely to proceed immediately but should continue receiving follow-up because circumstances can change.

Daily Workflow Checklist

- ☐ Review today's follow-up list
 - ☐ Complete scheduled phone calls and emails
 - ☐ Document patient responses
 - ☐ Schedule treatment when possible
 - ☐ Update the tracking binder
 - ☐ Prepare tomorrow's follow-up list
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TTI Best Practice

Consistency is more important than intensity. A reliable daily routine will outperform occasional bursts of follow-up activity.

The Three Patient Contacts

Each contact has a unique purpose. Rather than repeating the same message three times, the communication evolves as the patient's needs change.

2-Day Contact

Purpose: Reconnect

The first follow-up should occur approximately two days after the appointment while the doctor's recommendations remain fresh in the patient's mind. A personal phone call is preferred, although an email may also be appropriate.

Key Messages

- Thank the patient for visiting.
- Reinforce the doctor's findings.
- Offer assistance with scheduling.
- Invite questions.

Primary Goal

Make it easy for the patient to schedule recommended treatment.

2-Week Contact

Purpose: Remove Barriers

If treatment remains unscheduled after two weeks, reconnect to determine what is preventing the patient from moving forward.

Key Messages

- Ask if questions remain unanswered.
- Reinforce your commitment to helping.
- Offer assistance with scheduling.

Some practices also choose to extend a modest, time-sensitive scheduling incentive at this stage. The training shares an example of a practice successfully using a \$25 offer to encourage patients to complete treatment.

2-Month Contact

Purpose: Preserve the Relationship

The final scheduled contact should be less direct and focus on the patient's long-term oral health rather than scheduling pressure.

Key Messages

- We've been thinking about you.
 - We appreciate the opportunity to care for you.
 - Dental problems generally become more complex over time.
 - We are ready to help whenever the timing is right.
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Communication Principles

Every follow-up should be:

- Personal
- Positive
- Professional
- Helpful
- Respectful

Patients should leave every interaction feeling appreciated—not pressured.

Making the 222 System Successful

A successful follow-up program depends on consistency, accountability, and persistence. Practices that make the 222 System part of their daily operations create a better patient experience while recovering treatment that might otherwise remain unscheduled.

Weekly Success Checklist

Review the following each week:

☐ Number of patients entering the 222 System

☐ Number of follow-up contacts completed

☐ Appointments scheduled

☐ Outstanding treatment remaining

☐ Treatment dollars recovered

Use these results to identify opportunities for improvement and ensure the system is being followed consistently.

Results Shared in the Training

Practices implementing the 222 System have reported impressive outcomes.

One practice extended a modest scheduling incentive to **27 patients** with unscheduled treatment. Every patient scheduled before the offer expired.

Another large, multi-doctor practice assigned one full-time employee to manage the 222 process. According to the training, the practice recovered **approximately \$70,000 in treatment each month** through consistent follow-up.

These examples illustrate the value of a consistent, organized follow-up process.

Key Takeaways

- Every patient with unscheduled treatment should enter the 222 System.
- Assign one person responsibility for managing the process.
- Follow up at **2 days, 2 weeks, and 2 months**.
- Focus every conversation on helping—not selling.
- Measure results and refine the process over time.
- Consistency and persistence produce long-term success.

"Success is the result of perfection, hard work, learning from failure, loyalty, and persistence." — Colin Powell, as quoted in the training.

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