

# Workflow Builder

BULLETPROOF DENTAL CE SUMMIT · AUG 9, 2026 · SESSION A

*Every good workflow has four moving parts.  
Map them here — one workflow, one sheet.*

## WORKFLOW NAME

## WHAT IT DOES (ONE SENTENCE)

## WHO IT HELPS (TEAM MEMBER ROLE)

## THE FOUR MOVING PARTS

### 1 TRIGGER

*What starts the workflow? An event, a time, a document arrival, a schedule.*

### 2 AI STEP

*What does Claude actually do? Be specific — "draft an email," "extract key points," "summarize the call."*

### 3 HUMAN REVIEW

*Who reviews the AI output before it goes anywhere? What are they checking for?*

### 4 OUTCOME

*What actually happens as a result? Email sent? Report filed? Patient scheduled? Concrete.*

## PHI CHECK

*Does this workflow involve any patient-specific data?*

- ☐ **NO** — PHI-free zone. Consumer Claude is fine.
- ☐ **YES** — requires BAA-backed vendor. Do NOT use consumer Claude.

## TIME SAVED (ESTIMATE)

Current process: \_\_\_\_\_ minutes per occurrence

AI-assisted: \_\_\_\_\_ minutes per occurrence

Savings: \_\_\_\_\_ min × \_\_\_\_\_ per week = \_\_\_\_\_ hrs/month

## SUCCESS METRIC

*I will know this workflow is working when...*

## IMPLEMENTATION DATE

► Worked example on back

# Workflow Builder — Worked Example

|               |                                                                                            |
|---------------|--------------------------------------------------------------------------------------------|
| WORKFLOW NAME | <i>New-Patient Welcome Email Draft</i>                                                     |
| WHAT IT DOES  | <i>Turns exam notes into a personalized welcome email for every new patient.</i>           |
| WHO IT HELPS  | <i>Sarah, our office manager — currently spends 30 min/day writing these from scratch.</i> |

## THE FOUR MOVING PARTS

- 1 TRIGGER**  
*Every day at 5:00 PM, Sarah exports the day's new-patient exam notes as a CSV (patient initials only, no names).*
- 2 AI STEP**  
*Sarah opens Claude Desktop in our practice Project, pastes the notes, and says: "Draft a warm, on-brand welcome email for each of these new patients." Claude produces 5-8 drafts in ~2 min.*
- 3 HUMAN REVIEW**  
*Sarah reads each draft. Checks for tone, PHI, next-step accuracy. Rewrites 1-2 sentences per email. Adds actual first name back from her separate PMS report.*
- 4 OUTCOME**  
*Each email sent from Sarah's practice email between 5:30 and 6:00 PM. Patients receive same-day, feels warm and personal, references the actual visit.*

✓ **NO** — PHI-free zone. Initials only in the paste; first names re-attached manually after AI step. Consumer Claude is fine.

**Time saved:** Current: 30 min/day × 5 days = 2.5 hrs/wk · AI-assisted: 8 min/day × 5 days = 40 min/wk · **Savings: 22 min/day × 5 = 110 min/wk = ~8 hrs/month**

|                     |                                                                                                                               |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------|
| SUCCESS METRIC      | <i>NP → 2nd-visit conversion improves from 78% → 85% within 90 days. Sarah reports 2 hrs/week back for higher-value work.</i> |
| IMPLEMENTATION DATE | <i>Monday, August 11, 2026</i>                                                                                                |

## THE 4-STEP FRAMEWORK (SESSION A)

### TRIGGER → AI STEP → HUMAN REVIEW → OUTCOME

- **Start with the boring stuff first** — scheduling, communication, marketing. Not clinical.
- **Build one workflow at a time** — not three, not ten.
- **Make it save your team 5 minutes a day.** That's the floor.
- **Get your team involved on day one**, not month six. The bottleneck isn't tech; it's trust.
- **If the AI can't do it without PHI, use a BAA-backed vendor.** No exceptions.