Provider retention pilot plan

For DSO and multi-practice teams | Suggested worksheet to agree during the demo and onboarding

Use a small agreed scope and synthetic test records to prove the workflow. These are suggested acceptance checks, not additional product features, service commitments or a promised rollout timetable.

Pilot practices or provider group _____

Pilot lead and decision owner _____

Review date and agreed scope _____

Record evidence against each check

For each row, mark Pass, Fail or Not tested. Record evidence or an open action; leave untested items open.

Suggested acceptance check	Evidence or open action	Result
Starting records Provider identity, practice, joining date and owner are confirmed. Review supported Excel rows before creating records.	_____ _____	Pass / Fail Not tested
Invitation and submission Email and survey services are activated. A synthetic invitation arrives and the response submits without an Xpand login.	_____ _____	Pass / Fail Not tested
Access and visibility Every pilot practice has an eligible reviewer. Check provider and reviewer views, raw-feedback scope and the chosen response mode.	_____ _____	Pass / Fail Not tested
Concern and ownership A concerning response is reviewed and reaches an owned case with an action, review date and next update.	_____ _____	Pass / Fail Not tested
Follow-through and outcome Record updates and the provider's reply. Keep pending work, administrative closure and provider-confirmed resolution distinct.	_____ _____	Pass / Fail Not tested

Decision: Proceed / revise / stop **Decision owner:** _____

Open actions and next review: _____

The guided 14-day trial starts on account activation. No credit card is required. Optional training is available at no extra charge. Paid-plan activation is manual. Confirm plan allowances and service setup. A 14-day trial can test the workflow; it cannot establish improvement in annual retention.

Run the weekly review

Suggested agenda and provider launch message | Adapt to your team before use

Review date: _____ **Facilitator:** _____

Suggested weekly operating agenda

1. Check delivery and review exceptions. Identify failed invitations, missing eligible reviewers and practice-mapping issues. Agree who investigates each exception.

2. Review new concerns. Keep the provider's account separate from interpretation. Use the agreed alternate contact when a concern involves the usual manager.

3. Review due and overdue work. Confirm each action owner, review date and promised next update. Identify decisions requiring an authorized leader.

4. Confirm handoffs and outcomes. Check that the receiving owner accepts a handoff. Capture provider replies and distinguish closure from provider-confirmed resolution.

5. Leave with named next steps. Record the action, owner and due date for each open issue. Review actual workforce retention separately over a defined period.

Provider launch message to customize

Fill every bracket, confirm the response mode and access scope, and use only after the relevant services and reviewer assignments have been tested. This template has not been sent.

Subject: Your provider check-ins at [practice or group]

Hello [provider or team],

We are introducing DentalXpand check-ins to hear about your experience after joining and give concerns a clear owner and next step.

Your invitations will come from [verified sender]. The private email link opens without an Xpand login. Our response mode is [named or unnamed; confirm before sending]. [Authorized reviewer role or team] can read feedback for [confirmed scope]; [case-handling role] coordinates follow-up.

If unnamed responses are offered, your name is omitted from the response record. Invitation, participation and delivery records can still identify the intended recipient, and practice context or written details may reveal the author.

We will acknowledge concerns within [agreed standard] and provide the next update by [agreed standard or date]. If your concern involves your usual manager, contact [alternate review contact]. For help with an invitation, contact [support contact].

Thank you,
[Name and role]

Assign system responsibilities

Suggested responsibility worksheet | Complete with your HR, operations and DentalXpand teams

Decide which system is authoritative for each record and who keeps it current. This worksheet does not imply an integration or automatic synchronization. Confirm supported entry or import steps and service responsibilities during onboarding.

Work or record	DentalXpand workflow to discuss	Authoritative source and owner
Provider roster and practice assignment	Review identities, practice assignments and joining dates. Stage supported Excel rows for review.	Source: _____ Owner: _____
Joining expectations and readiness	Connect agreed role, hours, location and support with joining and credentialing-readiness checklists and supporting evidence.	Source: _____ Owner: _____
Human check-in tasks	Confirmed actual starts create owned tasks for days 7, 30 and 90. Agree who conducts each conversation and records next steps.	Source: _____ Owner: _____
Survey invitations and feedback	Configure and activate delivery for 2 weeks, then 1, 3, 6 and 12 calendar months. Assign eligible reviewers for each practice.	Source: _____ Owner: _____
Retention cases and follow-up	Agree raw-feedback access versus case-handling scope. Record action owners, review dates, progress and provider replies.	Source: _____ Owner: _____
Employment, payroll and workforce outcomes	Confirm which existing records govern employment status, compensation and departures. Evaluate actual retention from defined workforce records.	Source: _____ Owner: _____

Agree maintenance and exception owners

Name the responsible person or team and the handoff route for each change. Confirm available product steps in the walkthrough rather than assuming an automated transfer or offboarding flow.

Change or exception	Responsible person or team	Review or handoff route
New hire, practice transfer or departure	_____	_____
Reviewer leaves or access needs change	_____	_____
Invitation fails or no reviewer is assigned	_____	_____

Before launch: confirm each practice's eligible reviewer, alternate review contact, decision authority, service-activation owner and next-update standard.