

THE DENTAL PRACTICE AI STARTER GUIDE

10 ROLES TO BUILD AND WHERE TO BEGIN





welcome

Most dentists who try AI bounce off it within a few months.

Not because the tools fail. Because there is no structure underneath them. A handful of clever prompts, a folder of half-finished chats, and the sense that everyone else is getting more out of this than you are. In a recent survey of dentists at a DSD course in Miami, 72% reported using AI in some form. Only around 10% had built workflows that genuinely run. The gap between those two figures is the gap between using AI and getting leverage from it.

The gap is not effort, it is structure.

This guide gives you the structure. Ten roles a dental practice could build into AI specialists, the prerequisites for each, and a decision matrix at the back that points to which one to build first based on what is currently weakest in your practice.

In my role as CEO of DSD Digital Smile Design, I run 65 AI specialists in my daily work. That team was built one specialist at a time, iterated over weeks, not assembled over a weekend. This guide compresses what I have learned about which roles are worth building and in what order.

One diagnostic to carry through the rest of the pages: If someone in your practice has to remember to follow up on a lead, send a thank-you, ask for a review, or recover a treatment plan, you do not have a system. You have a person holding everything together. Each of the ten roles in this guide exists because a hero was carrying a system that should not depend on memory. I hope the payoffs are as transformative for you as they have been for the dentists who testdrove these.

Brendon MacDonald

CEO, DSD Digital Smile Design





What this guide gives you

There are two parts to this guide. The first is straightforward: the ten roles described on the pages that follow, what each one does, who in the practice benefits, and what it needs to work. The second part is the one most lead-magnet guides skip.

The first specialist on the list, the Identity Builder, is given to you in full.

One specialist, fully built. Yours to install today.

The Identity Builder is the foundation. Every other specialist in this guide reads from it. Without a Practice Identity, every AI assistant you spin up starts from zero and the output sounds generic. With one, the rest of the team has somewhere to begin. So this download includes two paste-ready files alongside this guide:

- The Pre-Research Prompt (separate .md file). Paste it into Perplexity, Claude with web search, or ChatGPT with browsing, fill in six fields about your practice, and you get back a structured pre-research report ready to feed the Identity Builder.
- The Identity Builder system instructions (separate .md file). The full prompt that turns a Claude Project (or ChatGPT Project, or Gemini Gem) into a specialist that conducts the 30–60 minute conversation that produces your Practice Identity document.

The files are deliberately kept separate from this guide so they live in your build folder, not your reading folder.

The other nine, named and described

Specialists 2 through 10 are described in this guide so you can see what the full team looks like and decide which one to build next. The system instructions, knowledge-base files, integrations, prerequisite documents, chaining patterns, and iteration cadence for those nine live in the Your AI Think Team course, along with seven hours of focused training and the CE credits (check out the last page for more info).

How to use this guide

Read the foundational concepts on the next page. Run the Pre-Research Prompt on your practice. Install the Identity Builder system instructions in a Claude Project and have the 3/20 session. Save the output document. Then read the other nine descriptions and use the matrix at the back to pick which ceiling to lift next.

Two foundations before you build

Two pieces of methodology underpin every role in this guide. Read these first; the role descriptions become significantly more useful once the language is in place.

The 4 C's

The 4 C's are the structure of any single conversation with AI. They are what separates a confidently-worded but generic output from one that is actually useful for a dental practice. They apply every time a chat opens. They are the conversation-level discipline. Without them, AI defaults to generic.

- **Context.** What the AI needs to know about the situation, the practice, and the people involved. Without context, AI generalises. With it, AI gets specific.
- **Content.** The actual material the AI is working with. Notes, transcripts, examples, files. AI knows everything on the internet and nothing about a particular practice; content is how that gap closes.
- **Command.** The specific task being asked of it. Not help me with X but do this specific thing, in this format, by these criteria.
- **Constraints.** The boundaries. Length, voice, what to avoid, what is non-negotiable. Constraints turn a draft into a usable output.

The BRIEF

The BRIEF is what makes a specialist permanent. The 4 C's solve a single conversation; the BRIEF means the specialist remembers who it is the next time the chat opens. It lives in the platform's project or persistent memory layer. Claude has Projects. ChatGPT has Projects. Gemini has Gems. Same idea, different names.

- **B – Build identity.** Who this specialist is. The practice it works for. The values, voice, and financial signature it carries.
- **R – Role context.** Why this specialist exists. What it owns. Where it sits in the wider team and what it is not responsible for.
- **I – Instructions.** How to behave when asked. The defaults. The decision rules. What to do when information is missing.
- **E – Evaluation criteria.** How to tell when an output is good. Almost always paired with three or four examples of the practice's actual past work.
- **F – Few-shot examples.** Real outputs from the practice that show the bar. Not theoretical descriptions; actual work the AI can pattern-match against.

Specialist 1:

The Identity Builder



This is your foundation. The single most important specialist on the team, and the one this guide hands you fully built.

What it does

Holds the practice's identity in one retrievable place. The voice it uses with patients. The values it markets on. The financial signature, meaning fee structure, payment plans, position on insurance. The key team and who does what. Every other specialist on this list reads from the Identity Builder before producing anything.

The problem it solves

Most AI use in dental practices fails at the same step. Every chat starts from scratch. The practitioner re-explains who the practice is, what it does, what it sounds like, and what it does not do. By the third or fourth chat of the day, that explaining is itself the work. The Identity Builder holds the explanation once, in a structured way, so every other specialist inherits it automatically.

Who in the team benefits

Everyone who builds or uses any specialist downstream. Most directly the practice owner and the office manager, since they will be the ones standing up the rest of the team.

What it needs to work

A short pre-research report covering the practice (the prompt to generate one is in the separate Pre-Research Prompt file in your download), a 30-60 minute conversation with the Identity Builder specialist (system instructions in the separate Identity Builder System Instructions file), and a willingness to push past the first generic answer your own brain produces.

Build it now

The two files alongside this guide hand you the artifacts in full. Run the Pre-Research Prompt, install the system instructions in a Claude Project, sit with it for an hour. You will have a Practice Identity document you can upload to every other specialist you build.

Your Identity Builder Pack



Two files came alongside this guide. Use them in order. Both are paste-ready; nothing to write yourself, just fill in the bracketed variables and copy.

[Download link](#) 🖱️ [File 1: The Pre-Research Prompt](#)

A research-discipline prompt that gathers publicly available material about your practice and structures it into a pre-research report. Paste it into Perplexity (recommended for its citation discipline), Claude with web search, or ChatGPT with browsing. Fill in six variables: practice name, principal dentist, owner if different, location, website URL, primary specialty if any. Run it. Save the output as a PDF or markdown file. Time: 10–15 minutes.

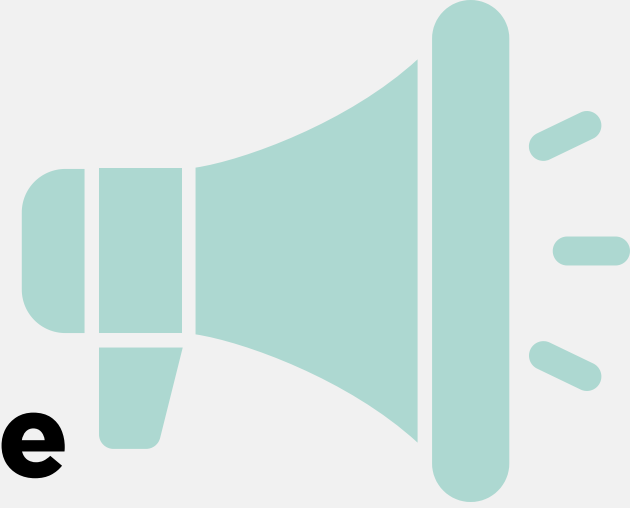
[Download link](#) 🖱️ [File 2: The Identity Builder system instructions](#)

The full prompt that turns a Claude Project (or ChatGPT Project, or Gemini Gem) into the Identity Builder specialist. The specialist runs a 30–60 minute conversation in four phases; practice facts, your DNA (beliefs, anti-positioning, why, problems, prize), authority and patients, then a confidence review, and produces your Practice Identity document at the end. It pushes back on generic answers by design.

How to run the build (about an hour, total)

1. Run the Pre-Research Prompt in your AI tool of choice. Save the output.
2. Open a new Claude Project. Paste the Identity Builder system instructions into the project's instructions field. Upload your pre-research report to the project's knowledge base.
3. Open a new chat in the project. The Identity Builder will detect the pre-research report and open in Validation Mode. Have the conversation.
4. Save the Practice Identity document the session produces. Upload it to the knowledge base of every other specialist you build after this.

The Pre-Research Prompt gathers publicly visible facts about your practice. The Identity Builder conversation draws out what only you know, what you believe, what you stand for, what you refuse to do, why you started, what transformation you create. The pre-research saves time on facts. It does not save time on identity. Take the conversation seriously.



Specialist 2: The Brand Voice Engine

This is your voice keeper. What the practice sounds like, and what it does not.

What it does

Holds the practice's voice as a working specification, not as a slogan. Captures what the practice sounds like to a prospective patient, to an existing patient at recall, to a referring colleague, to a new hire. Equally important, it captures what the practice does not sound like. Used by every specialist that produces external-facing copy, from website pages to treatment-plan letters to social posts.

The problem it solves

Voice drift. The specific way a practice sounds is one of its few real differentiators, and most AI-produced copy reads like every other AI-produced copy because the practice never told the AI who it is in writing. The Brand Voice Engine fixes this once, in a way that travels.

Who in the team benefits

The practice owner, the marketing coordinator if the practice has one, and anyone else who produces patient-facing or referral-facing copy. Most acutely, anyone who has tried to use AI to write a website page and felt the result was technically fine but did not sound like the practice.

What it needs to work

A page or two of representative copy from the practice. Three to five examples of the practice sounding like itself in different contexts (a website hero, a recall email, a referral letter). A short list of phrasings, words, and tones the practice avoids. The avoid-list is the most-skipped part of the brief, and the most useful.

Where it lives in the course

The Brand Voice Engine is built in the course as the second of the two foundational specialists, after the Identity Builder. It reads from your Practice Identity and produces a Practice Voice Guide.



Specialist 3:

The Treatment Presentation Builder

This is your patient-facing presentation specialist.

HIPAA flag (read this first).

The Treatment Presentation Builder is technically possible to build today, but the HIPAA-compliant path for non-enterprise users is not fully solved. The two practical options are these. Build it using anonymised patient data only, applying the 18 HIPAA identifiers as a checklist on every input. Or wait for the BAA-enabled enterprise tier of the chosen platform and build it there. Do not build this one with live patient data on a consumer subscription.

What it does

Takes the clinical decisions from a treatment plan and produces a patient-facing presentation that explains what is being recommended, why, what the alternatives are, and what the financial picture looks like. Pairs with the Brand Voice Engine so the presentation sounds like the practice, not like a generic AI.

The problem it solves

Treatment presentations are inconsistent across the team. The dentist says one thing, the treatment coordinator says another, the financial conversation feels disconnected from the clinical case. The Treatment Presentation Builder produces a single coherent document, in the practice's voice, that the team works from.

Who in the team benefits

The treatment coordinator most directly. The dentist, by saving the time it currently takes to brief the TC on each new case. The patient, by getting a presentation that is internally consistent and properly explained.

Where it lives in the course

The full build, the HIPAA setup guide, the anonymisation checklist, and the example cases are in the course. If the practice is on a consumer plan, don't start here. Build the Identity Builder, the Brand Voice Engine, and at least one other practice-facing specialist first.



Specialist 4:

The Insurance Appeals Writer

This one writes and refines insurance appeals using the practice's own history of denied claims.

What it does

Reviews denied claims, references previous successful appeals from the practice, and produces a draft appeal letter. The specialist is trained on the practice's actual appeals history, so the language and clinical justification follow patterns that have worked before. A team member reviews and signs.

The problem it solves

Appeals are revenue the practice has already earned but not yet collected. Most practices either do not appeal denied claims at all, or write each appeal from scratch under time pressure. The first leaves money on the table. The second makes the appeals weaker than they could be. The Insurance Appeals Writer turns a haphazard process into a repeatable one.

Who in the team benefits

The insurance coordinator or billing manager most directly. The practice owner indirectly, through the additional collections this work surfaces. Especially high-leverage for fee-for-service practices that work with benefit companies on a case-by-case basis.

What it needs to work

A library of past appeals from the practice, with outcomes labelled (won, lost, partial). A short document explaining the practice's typical clinical justification language. The Identity Builder and Brand Voice Engine in place, so the letters sound like the practice.

Where it lives in the course

Full system instructions, the appeals library schema, the labelling protocol, and example won-vs-lost contrasts are in the course.

Specialist 5: The Content Machine



This is a chain of three specialists, working in sequence, that produces the practice's marketing without needing a four-person marketing team.

What it does

Three sequential specialists, each one passing its output to the next.

- Interview extractor. Takes a transcript or a recorded interview with the practice owner, a clinician, or a patient, and pulls out the structured material a marketing piece needs. Quotes, statistics, specific stories, before-and-after numbers.
- Copywriter. Takes the extracted material and writes the marketing piece in the practice's voice, anchored to the Brand Voice Engine.
- Page builder. Takes the copy and structures it for the destination, whether that is a landing page, an email, or a social post, with the page-specific layout instructions baked in.

The problem it solves

Marketing is the system most dental practices say is handled by no one in particular. There is no shortage of material; the practice has interesting cases, satisfied patients, and stories worth telling. There is a shortage of capacity to turn that material into finished pieces. The Content Machine is what closes the gap.

Who in the team benefits

A marketing coordinator gains capacity. A practice without a marketing coordinator can have one team member running the chain a few hours a week.

Where it lives in the course

All three specialists, the chaining instructions, the prerequisite documents (Endless Customers Foundation, Content Format Library, Topic Library, Voice and Compliance Guide), and four to six weeks of iteration cadence are in the course.

Specialist 6: The Financial Analyst



This is two paired specialists: cash flow assistant and a CFO assistant.

What it does

Reads exports from the practice's accounting software, including cash flow statements, P&L, and AR ageing, and produces two outputs. The cash flow assistant maintains a 13-week rolling cash flow forecast. The CFO assistant surfaces signals: collection trends, payer mix shifts, expense categories drifting outside their normal ranges, anything the practice owner would want flagged.

The problem it solves

Most practice owners look at financial reports infrequently and reactively. The reports are produced; they sit in a folder; nobody reads them until something feels wrong. By that point the signal has been visible in the data for weeks. The Financial Analyst surfaces the signal earlier and in language a practice owner can actually act on.

Who in the team benefits

The practice owner. Indirectly, the office manager and the bookkeeper, since the practice owner is suddenly asking better questions about specific data points instead of calling for the quarterly review.

What it needs to work

Read access to accounting software exports (CSV is enough; a connector is better if the platform supports it). A documented set of normal ranges for the practice's main expense categories. The Identity Builder, since financial commentary is voice-sensitive.

Where it lives in the course

Both specialists, the cash flow model architecture, the AR rollforward template, the cash receipts and disbursements templates, and the benchmarks library are in the course.

Specialist 7: The Decision Partner



The one most readers will recognise themselves in.

What it does

Captures the reasoning behind a decision before the decision is made, then surfaces relevant past decisions when a similar one comes up. Asks counterfactual questions. Surfaces blind spots. References whatever decision-making framework the practice owner uses.

The problem it solves

Practice owners make most of their important decisions alone, late in the day, after the chair work is done. Decisions made by feel often turn out to be the same decision the owner made the last time and forgot they had made. The Decision Partner pulls the reasoning out of the owner's head and into a place it can be returned to, learned from, and challenged.

Who in the team benefits

The practice owner, almost exclusively. Indirectly, anyone in the practice affected by decisions that are now better-considered.

What it needs to work

A backing database for past decisions. Brendon uses Notion for Decision Annie; any structured note system works. The Identity Builder, since the practice's values inform every decision the partner is asked about. A standing prompt at the start of any meaningful decision: before I decide, let's walk through this.

Where it lives in the course

Full system instructions, the 16 dental-practice decision archetypes with base-rate data, the decision-log schema and templates, and the Google Drive / Notion integrations are in the course.



Specialist 8: The SOP Builder

This is the standard operating procedures generator. The foundation for any future automation.

What it does

Takes a recorded video walkthrough of a process, with the team member doing it narrating what they are doing and why, and produces a structured SOP document. The output is not a transcript. It is a usable procedure with the steps, the decision points, the failure modes, and the success criteria captured in a format another person could pick up and run from.

The problem it solves

Most processes in a dental practice are documented in someone's head. When that person is busy, sick, on holiday, or leaves, the process leaves with them. SOPs are the obvious answer, and most practices have tried to write them and stopped because writing them takes forever. Recording a 10-minute walkthrough and feeding it to the SOP Builder takes the friction out.

Who in the team benefits

The office manager most directly. The practice owner, since SOPs are the prerequisite to any further automation. The team member whose process is being captured, since the process becomes portable.

What it needs to work

A simple way to record screen and voice (Loom, QuickTime, or any equivalent). A standing list of the practice's processes that need SOPs. The Identity Builder, since the practice's voice carries into the SOPs.

Where it lives in the course

Full system instructions, the SOP methodology, sample SOPs, and compliance reference for USA/UK/EU/ANZ are in the course.

Specialist 9: The Team Coach



This is the team 1:1 prep specialist.

What it does

Records team 1:1s. Five minutes before the next 1:1 with that team member, surfaces the relevant context: what was discussed last time, what was promised, what has been raised in other 1:1s that connects, and which themes the team member has been bringing up repeatedly. After the meeting, summarises and flags coaching opportunities, including patterns in language and tone that would otherwise be invisible to the practitioner running the meeting.

The problem it solves

Team 1:1s are one of the highest-leverage uses of a practice owner's time, and one of the easiest to deprioritise when the day runs over. Most owners arrive at 1:1s under-prepped and leave with a vague sense of having covered some ground that never quite turns into action. The Team Coach takes the prep and the follow-through off the owner's plate.

Who in the team benefits

The practice owner. The team members in the 1:1s, who feel the difference between being met with context and being met cold.

What it needs to work

Permission to record, always, explicitly. A simple recording setup; an iPhone voice memo is what Brendon uses for his version. The Identity Builder, since the practice's coaching style and values inform what counts as a coaching opportunity. A standing place for the meeting summaries to live.

Where it lives in the course

Full system instructions, the role taxonomy, competency framework, vocabulary, difficult-conversations playbook, cadence guide, KPI coaching map, and team profile template are in the course.



Specialist 10: The Hiring Manager

This is the job posting drafter, screening triage, and interview prep specialist.

What it does

Drafts job postings anchored to the practice's voice and values. Triage incoming applications against a clear rubric and surfaces the candidates worth interviewing. Prepares interview question sets matched to the candidate's specific background and the role's specific demands. The specialist does not make the hiring decision; the practitioner does.

The problem it solves

Hiring is the slowest part of growth in most practices. Every hire takes weeks longer than it should because each step is done from scratch: writing the posting, sorting the applications, designing the interview, writing offer letters. The Hiring Manager turns each step into a starting draft instead of a blank page.

Who in the team benefits

The practice owner, the office manager, and any team member who has been pulled into the hiring loop because the owner could not get to it. The candidates also benefit, since interviews become more substantive and less generic.

What it needs to work

The Identity Builder and Brand Voice Engine, since job postings are voice-sensitive and the practice's culture should come through. A clear scoring rubric for the role. Three to five examples of past hires the practice considers strong, with the reasons documented.

Where it lives in the course

Full system instructions, the validity hierarchy, the WHO method adapted for dental, scorecard templates, the question bank, the diagnosis plays, the compliance rules, and worked case studies are in the course.

Where to lift the ceiling next

The AI Think Team isn't there to automate your practice. It's there to lift the ceiling on how well you think, decide, and act — with a thinking partner that holds the standard, remembers the context, and pushes back when your reasoning gets thin. Pick the ceiling that, lifted, would change the most about how you run. Build the corresponding specialist next.

Note: the Identity Builder and Brand Voice Engine are foundations everything else reads from. They're not in the table because they're not where to start next, you build them first (you already have the Identity Builder in this download). The table below is where you go after the foundations.

Where you want to lift the ceiling	The specialist	How it works with you
Closing the case	The Treatment Presentation Builder	Works through the clinical decisions with you before the patient sits down. The presentation is in your voice, internally consistent, properly explained.
Catching the revenue you've already earned	The Insurance Appeals Writer	Drafts each appeal informed by every one you've won. You stop writing from scratch under time pressure; the structure of the appeal carries the patterns that work.
The hardest calls you make alone, late, by feel	The Decision Partner	A sparring partner that asks the questions your inner monologue won't, surfaces relevant past decisions, and remembers what you decided last time.
Turning what you already know into content	The Content Machine	Your stories, your patients, your IP. The chain turns them into finished pieces — in your voice — without needing a marketing hire.
Hiring the next person who will actually stay	The Hiring Manager	Each step (post, screen, interview) becomes a starting draft. You spend hiring time on the candidates worth interviewing, not on the blank page.

Where to lift the ceiling next

Where you want to lift the ceiling	The specialist	How it works with you
Reading your numbers before they go wrong	The Financial Analyst	Surfaces collection trends, payer-mix shifts, and expense drift in language you can act on, weeks before the quarterly review would have flagged them.
Walking into 1:1s with the context, not the catch-up	The Team Coach	Recalls the last three meetings, surfaces patterns you'd otherwise miss, and walks into the room ready before you do.
Getting a process out of one person's head	The SOP Builder	A 10-minute walkthrough becomes a procedure another person can follow. The knowledge is now portable, not trapped in someone's memory.

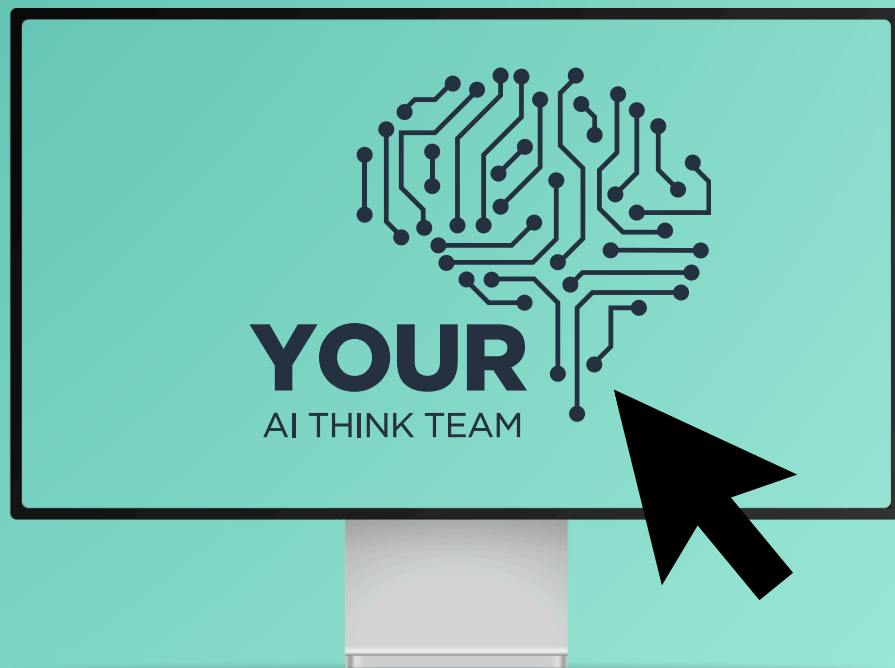
Ready to build your the other 9?

You have the Identity Builder. The other nine specialists in this guide; the full system instructions, the knowledge-base files, the prerequisite documents, the chaining patterns between specialists, the iteration cadence, and the integrations, are built out in detail in the Your AI Think Team course.

As CEO of DSD Digital Smile Design, I have built and run 65 AI specialists in my daily work. This course is a compressed version of that system, built specifically for dental practice owners.

Your AI Think Team features

- 10 modules, 7+ hours of focused training
- 7 CE credits
- On-demand, self-paced
- \$495 one-time enrolment, plus \$20/month ongoing for the supporting toolkit (ongoing specialist updates, new builds added to the team and integration patterns as they evolve)
- Created and presented by Brendon MacDonald



Sign up today



<https://digitalsmiledesign.com/content-offer-the-dental-practice-ai-starter-guide>