AI ACTION PLAN

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AI READINESS ASSESSMENT / FULL REPORT

AI Action Plan for Bondi Coastal Dental

A diagnostic of current AI & automation readiness across six operating pillars — with a prioritised 90-day plan, tool stack, and projected ROI tailored to your business.

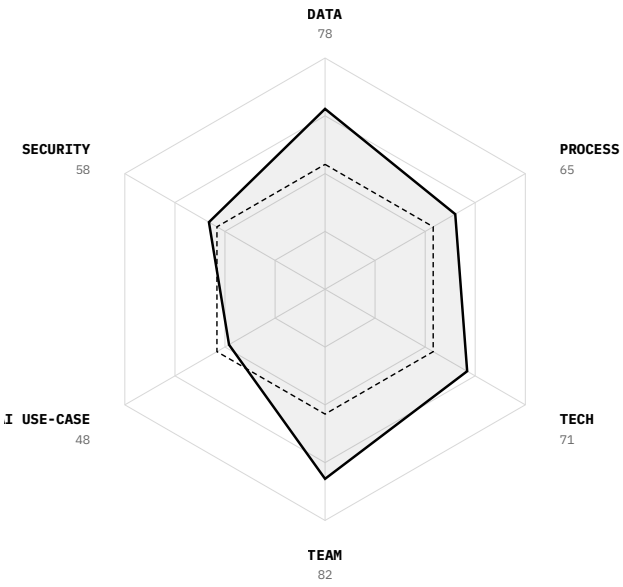
PREPARED FOR	INDUSTRY	TEAM SIZE	LOCATION
Dr Priya Naidu	**Healthcare · Dental**	**6-10**	**Bondi, NSW, AU**

01 OVERALL READINESS

64 /100

AI READINESS INDEX

+10 points above the Dental SMB median of 54. You're tracking ahead of peers, with measurable upside in AI Use-Case and Security.



BONDI COASTAL DENTAL — DENTAL SMB MEDIAN

02 EXECUTIVE SUMMARY

You're tracking ahead of the dental SMB median — and the next lift sits in two well-defined pillars.

Bondi Coastal Dental is running a clean front-of-house operation: Cliniko is the source of truth for patients and appointments, the team books reliably through online forms, and the recall workflow actually fires. That's why your Data and Team scores sit in the green band — you've already done the unglamorous work most practices skip.

The drag is on two fronts. First, AI Use-Case Fit is genuinely weak today: the practice has a handful of credible candidates (clinical scribing, recall messaging, treatment-plan summaries) but none have been scoped past conversation. Second, security controls have not kept pace with the team size — shared logins, no password manager, and 2FA only on the practice owner's Microsoft account. Both are closeable inside 90 days without disrupting clinical hours.

The 90-day plan below sequences a single clinical-scribe pilot, a recall-message rewrite using a shared prompt library, and the security baseline work — in that order — so the team sees a tangible time saving in the first month and the compliance uplift lands before any AI tool touches patient records.

03 KEY FINDINGS

Five things that matter most.

01 Cliniko captures **88% of patient interactions cleanly** but the practice still re-types clinical notes into Dental4Windows for imaging — roughly **6 hours of duplicate entry per week** across the clinical team.

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02 Recall messaging runs on a **manual SMS workflow** with no personalisation; benchmarked against peer practices it's leaving an estimated **$4,800/month of recoverable revenue** on the table.

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03 Clinical note-taking takes **45 minutes per dentist per day** and is the single biggest non-clinical time sink. A scribe tool deployed to two dentists would recover roughly **8 hours per week** without changing the patient experience.

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04 Security baseline is **below sector norm** — shared front-desk logins, no password manager, 2FA absent on Cliniko and email. This must be closed before any tool is given access to patient records.

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05 The team is **AI-curious but unsupported** — the practice owner has trialled three tools privately, but there is no shared prompt library, no documented use-cases, and no internal champion identified.

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04 PILLAR BREAKDOWN

Six pillars, scored and diagnosed.

Data Readiness WEIGHT 25%

78/100

Cliniko is the operational source of truth and is being used cleanly — patient records, appointments and recall queues all live in the one system. The remaining fragmentation is the Dental4Windows imaging workflow, which still requires re-keying. That is a tractable integration project, not a re-platform.

● STRONG — CLEAN DATA FOUNDATIONS

Process Maturity WEIGHT 20%

65/100

Front-of-house and recall are documented and run consistently across the four-day clinical week. Clinical notes and treatment-plan workflows still rely on individual dentists' habits, which keeps quality variable. A shared note template plus the scribe pilot would close most of this gap.

● SOLID FOUNDATION — GAPS IN DOCUMENTATION

Tech Stack Fitness WEIGHT 20%

71/100

Cliniko, Dental4Windows, Xero and Microsoft 365 are all modern and capable of carrying more load than they currently do. The integration layer is the soft spot — Zapier is in place but only for two flows, leaving obvious automations un-built (recall confirmations, no-show follow-ups, post-visit feedback).

● SOLID FOUNDATION — INTEGRATIONS UNDER-USED

Team Capability WEIGHT 15%

82/100

The clinical team is small, tight, and demonstrably willing to adopt new tools — Cliniko itself was rolled out without external help. The owner has personally trialled scribe tools and meeting transcription. The missing piece is a shared playbook so individual experiments turn into team-wide capability.

● STRONG — TEAM IS AI-READY

AI Use-Case Fit WEIGHT 10%

48/100

Clinical-scribe, recall message rewriting, and treatment-plan summarisation all map onto current pain points but none have been scoped, costed, or trialled in a structured way. AI fit will move from red to amber the moment one use-case is shipped end-to-end with measured time savings.

● NEEDS WORK — FIT IS CURRENTLY WEAK

Security Posture WEIGHT 10%

58/100

Shared front-desk logins, no password manager, and 2FA absent on Cliniko and Microsoft 365 leave the practice below the baseline expected by the Dental Board's record-keeping guidance. None of these are expensive to fix; all of them must be in place before a third-party AI tool is connected to patient data.

● NEEDS WORK — ADDRESS BEFORE SCALING

05 INDUSTRY BENCHMARKS

How you compare.

YOUR SCORE	INDUSTRY AVERAGE	TOP PERFORMERS
64	**54**	**79**
Bondi Coastal Dental	Dental SMB	Top decile

06 QUICK WINS

Three things to do this week.

01 Pilot Heidi clinical scribe with two dentists

6–8 HRS / WEEK
SETUP: 2 HOURS

Heidi sits alongside the dentist during consults and drafts the clinical note in real time. Two-week trial with two dentists, then assess against current note-taking time.

02 Roll out 1Password and enable 2FA on Cliniko + M365

2 HRS / WEEK
SETUP: 3 HOURS

Replaces shared logins, brings the practice up to sector-baseline security, and is a hard prerequisite for any AI tool that touches patient records.

03 Rewrite recall SMS using a shared prompt library

3–4 HRS / WEEK
SETUP: 1 HOUR

Move from generic recall reminders to personalised two-line messages drafted from a shared template. Expected lift: 8–12% recall conversion based on peer data.

07 RECOMMENDED TOOL STACK

Five tools, chosen for your stack.

Heidi CLINICAL AI SCRIBE

From $99 / dentist / mo

Drafts clinical notes from the consult conversation. AHPRA-aware, supports Australian dental terminology, writes back into Cliniko via copy-paste or integration.

Cliniko + Zapier PRACTICE AUTOMATION

From $29 / mo

Keep Cliniko as the source of truth and use Zapier to fire recall confirmations, no-show follow-ups, and post-visit feedback without manual chasing.

1Password Business SHARED-PASSWORD HYGIENE

$10.99 / user / mo

Removes shared logins, enforces 2FA, and gives clean offboarding when staff change. Foundation for any AI tool that needs system access.

Calendly + Cliniko FRICTIONLESS BOOKING

From $12 / user / mo

Replaces the manual phone-callback queue for new-patient enquiries. Captures intake answers up-front so the front-desk team starts triaged.

Notion TEAM PLAYBOOK

From $10 / user / mo

Single home for clinical note templates, the shared prompt library, and the SOPs — searchable, version-controlled, and trivial to onboard new clinicians into.

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08 90-DAY ACTION PLAN

A phased rollout you can actually execute.

DAYS 01 – 30

Security baseline + scribe pilot

PHASE 01 / 03

- Roll out 1Password to all eight team members
- Enable 2FA on Cliniko, Microsoft 365, Xero and the booking inbox
- Run a two-dentist Heidi scribe pilot for 14 clinical days
- Capture before/after note-taking time per dentist

DAYS 31 – 60

Recall + automation layer

PHASE 02 / 03

- Rewrite recall SMS templates using a shared prompt library
- Wire Zapier flows for recall confirm, no-show, and feedback
- Document the clinical-note template in the shared playbook
- Decide whether to extend Heidi to all four dentists

DAYS 61 – 90

Embed and measure

PHASE 03 / 03

- Identify an internal AI champion (likely the practice manager)
- Run a one-hour team session on the prompt library and SOPs
- Measure recall lift, time-saved per dentist, and admin hours reclaimed
- Pick the next quarterly automation target (likely treatment-plan summaries)

09 PROJECTED RETURN ON INVESTMENT

The numbers, conservatively.

ROI FORECAST · 12 MONTHS	**Payback in under 4 weeks · ~5.4× return on a $420/mo stack**
WEEKLY HOURS SAVED **10–14 hrs** Across the 6-10 team	ANNUAL COST SAVINGS **$26k – $36k** At $50/hr loaded cost
MONTHLY TOOL INVESTMENT **~ $420 / mo** All five recommended tools	PAYBACK PERIOD **< 4 weeks** 12-month ROI ≈ 5.4×

NEXT STEPS

Need help implementing?

Our Done-With-You engagement pairs you with a specialist who'll execute this 90-day plan alongside your team — from Zapier setup to prompt library build and team training.

DONE-WITH-YOU TIER · FROM $1,500

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