

Part 2: Build a Tech Stack Your Team Actually Uses

Tech Stack Builder

Section 1: Evaluate Your Practice's Needs

Before you add more tools, define what's broken or inefficient.

Step 1: Map your Patient & Practice Journey

Stages:

1. Patient Acquisition (marketing, lead conversion)
2. Scheduling (calls, online booking, confirmations, show rates)
3. Clinical Care (charting, diagnostics, treatment planning, time in the chair - break down x-rays, consult)
4. Billing and Payments (insurance, collections, claims, DOS collections)
5. Retention & Follow up (recalls, reviews, reactivation campaigns)

Ask the team and yourself - where are the bottlenecks, frustrations, or wasted time?

Step 2: Assess your existing tools

Create a table with:

- Software name
- What it's used for
- Strengths
- Gaps or frustrations
- Any duplicate functions?
- What is it costing? Are we utilizing it efficiently?

Example:

Technology	Strengths	Gaps	Cost	Utilization Score (1-10)	Keep?		
Overjet							

Section 2: Build an Integrated Stack, Not Just a List

Tools should talk to each other.

- Look for integrations (e.g Weave + Open Dental)
- Avoid Data Silos - one system for one thing can create clutter, excessive dashboards, and user burnout
- Prioritize API compatibility
- Choose tools with open communication with your PMS

Section 3: Top 10 Questions to Ask before adding Any New Tech

1. Does it integrate with our PMS or imaging software?
2. What problem is it solving specifically?
3. Will it create a new problem that will need to be solved?
4. Will it eliminate or duplicate an existing tool?
5. Is the team trained and ready to use it?
6. What's the customer support after onboarding?
7. Can it scale with our growth?
8. What's the ROI in time or collections?
9. How long is the contract?
10. Who owns the data?

Section 4: Your Tech Stack Action Plan

- Audit current tools (use worksheet)
- Rate systems (Green, yellow, red scorecard)
- Prioritize 1-2 areas to improve
- Pilot new tools in phases
- Train team before full roll out

Need Help auditing your tech stack and finding solutions that work for you? Contact Caitlin at info@foxandlotusconsulting.com