

The five-minute conversation behind **roughly \$236,000** of first-year aligner production. Dr. Kaz Uyesugi, Uyesugi Dental, San Jose.

THE MENTAL MODEL

You pitch. We knock it out of the park.

You are not being asked to become an orthodontist. Notice it, name it, open the door, and hand it off to your Ortho Treatment Coordinator to close.

YOUR PITCH

You. Notice it, name it, and open the door in five minutes of chair time.

THE HAND-OFF

The Ortho Hub. Scheduling, records, and the hand-off live here, not in your head.

THE CLOSE

Your Ortho Team. Diagnosis, plan, fee, and treatment are theirs to carry.

BEFORE THE DOOR OPENS

The sixty-second file review

- ☐ **Family relationships.** Who else in the household sits in your chairs.
- ☐ **Recent life events.** A wedding, a retirement, a new grandchild.
- ☐ **Insurance status,** especially orthodontic coverage.
- ☐ **Last clinical conversation.** What you already told them.
- ☐ **Anything noted at the last recall.** Wear, chipping, recession.

SAY IT IN ONE LINE

Four analogies that do the heavy lifting

- 1 Amazon One Medical.** The virtual orthodontist is already normal. Care at a distance is not a compromise.
- 2 Car tire alignment.** Uneven wear gets expensive. You rotate tires, you do not replace the car.
- 3 The shoe-dragging son.** Wear has consequences. It shows up long before it hurts.
- 4 For the skeptic:** "I'll never be the doctor who says I told you so."

The rule: two minutes of personal conversation before any clinical. Compliment first, then concern. Always.

KNOW WHO IS IN THE CHAIR

Five patient archetypes, five conversations

01 The empty-nester approaching retirement

TRIGGER avoid extensive dentistry in retirement

03 The busy parent

TRIGGER forty to fifty hours back

05 The young, cosmetic-driven patient

TRIGGER aesthetics first, health benefit second

02 The mother of the bride

TRIGGER wedding photos anchor the long-term health benefit

04 The health-conscious early retiree

TRIGGER longevity, teeth as part of the wellness stack

THE HAND-OFF

Elevate your orthodontist

Their name Case volume Credentials Fee comparison
Refinement rate

Never quote the fee or the timing yourself. Those belong to the Ortho Team. Trade specifics for speed and confidence.

INSTEAD, SAY THIS

"They finish cases *2 to 3 times faster* than I can."

SHORT ON TIME. THE 90-SECOND VERSION

Drop the stories. Name the clinical finding, bullet the advantages, and offer the included consultation today.

"NOT TODAY" IS NOT A NO. IT IS NOT YET

Log the yellow flag in the patient's chart for you to review next time they are in. A deferred patient is a scheduled patient you have not met yet.



Pick one patient from tomorrow's schedule. Choose their archetype below, or define your own. Then write the conversation you'll actually have.

STEP ONE. CHOOSE THE ARCHETYPE

☐ 01 **Empty-nester approaching retirement** Avoid extensive dentistry in retirement

☐ 02 **Mother of the bride** Wedding photos anchor the long-term health benefit

☐ 03 **Busy parent** Forty to fifty hours back

☐ 04 **Health-conscious early retiree** Longevity, teeth as part of the wellness stack

☐ 05 **Young, cosmetic-driven patient** Aesthetics first, health benefit second

☐ 06 **My own archetype:** _____ **Their trigger:** _____

STEP TWO. BUILD THE FIVE MINUTES

YOUR PATIENT

OPENING LINE compliment first

TRIGGER TRANSITION personal to clinical

CLINICAL FINDING TO NAME

HOW YOU'LL ELEVATE YOUR ORTHODONTIST

HAND-OFF LINE

YOUR ARCHETYPE NOTE TO THE ORTHODONTIST AND ORTHO TREATMENT COORDINATOR

STEP THREE

Review your script, then open the Ortho Hub

☐ Schedule the virtual consultation (30 seconds)

☐ Share any pre-treatment dental work (you already have it)

☐ Upload X-rays

☐ Upload insurance

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