

CASE STUDY

Bright Smile Dental

AI-Powered Inbound Voice Assistant — Emma

watch case study on youtube: <https://youtu.be/fzOrbZ09bbw>

CLIENT	AGENT NAME	PLATFORM	CALL TYPE
Bright Smile Dental	Emma	Retell + Make	Inbound Patient Calls

Project Overview

Bright Smile Dental is a general and cosmetic dental practice serving Orlando, FL across two locations — North and South. The practice offers a full range of services including children's dentistry, cosmetic dentistry, teeth whitening, extractions, periodontal care, and preventative care, with appointments available Monday through Saturday.

Like most dental offices, Bright Smile's front desk juggles a constant mix of new patient calls, existing patient questions, and the occasional urgent issue — all while checking in patients who are already in the waiting room. The practice needed a way to answer every call warmly and accurately, without staff having to choose between the phone and the patient standing in front of them.

The solution was Emma — an AI-powered inbound voice assistant built on Retell and connected to Make for booking confirmations — designed to handle patient calls naturally, answer questions safely, and schedule appointments end to end, including sending the confirmation email automatically.

Problem Statement

Bright Smile Dental's front desk team faced four recurring challenges with inbound calls:

- Calls competing with patients in the office — staff helping someone at the front desk often couldn't pick up the phone right away, so calls went to voicemail or got rushed.
- Inconsistent answers to common questions — without a standard way to answer questions about services like whitening or cosmetic dentistry, patients sometimes got different information depending on who answered.
- Risk of saying too much over the phone — staff occasionally found themselves commenting on a patient's symptoms or describing what a treatment might involve, when that's really a conversation for the dentist.
- Manual appointment confirmations — once a booking was made, sending the confirmation email was a separate manual step, easy to forget during a busy day.

Solution

We built Emma — a conversational AI voice assistant deployed on Retell — to handle inbound calls for Bright Smile Dental. Emma listens to the patient's concern first, asks one clear question at a time, answers using only approved practice information, and books appointments directly into the calendar — automatically triggering a branded confirmation email through Make once the booking is complete.

KEY PRINCIPLE

Emma never diagnoses, never guesses about treatment, and never combines answering a question with asking the next one in the same response. Each reply does exactly one thing — answer, ask, or take an action — keeping every conversation calm, clear, and easy to follow.

The Voice Assistant — Emma

Emma is built to sound like a real receptionist who genuinely listens before responding — not a script reading off questions. The system prompt enforces a strict rule: never answer a question and ask a follow-up in the same breath. This keeps the pace relaxed and makes it easy for patients to follow along, especially when they're anxious or in discomfort.

The call flow follows a deliberate structure:

1	Greeting & Listening	Emma opens with a warm, consistent greeting and lets the patient explain their concern fully before asking anything — whether that's a toothache, a question about whitening, or booking a routine cleaning.
2	One Follow-Up Question	Emma asks a single, simple question to understand the situation better — for example, how long the pain has lasted, or whether the patient has visited the office before. Never more than one question at a time.
3	Answering from Approved Information	Emma answers using only approved practice information — no guessing about costs, procedures, or outcomes, and never describing what's medically appropriate for the patient's specific situation.
4	Recommending the Next Step	If seeing a dentist would help, Emma suggests booking an appointment and then stops, waiting for the patient to respond before moving forward.
5	Appointment Booking	Emma checks availability, offers two appointment times, and collects name, phone (auto-filled from caller ID), and email — confirming the email letter by letter before moving on.
6	Confirmation Email	Once the appointment is booked, Emma triggers an automatic confirmation email through Make, then lets the patient know it's on its way — closing the loop without any manual follow-up.

Staying Within Scope

Dental calls often start with a patient describing pain or a cosmetic concern, which makes it tempting to offer reassurance that sounds like medical advice. Emma is built to stay firmly in its lane — acknowledging the patient's concern with empathy, while leaving any actual diagnosis or treatment recommendation to the dentist.

EXAMPLE INTERACTION

Patient: "I chipped one of my front teeth this morning, is that something you can fix today?"

Emma: "Oh no, that sounds stressful — I'm sorry that happened. Has the dentist seen it before, or would this be your first visit with us?"

Notice Emma never speculates about whether same-day repair is possible or what the fix might involve — that judgment is left entirely to the dentist during the visit.

Make Automation Backend

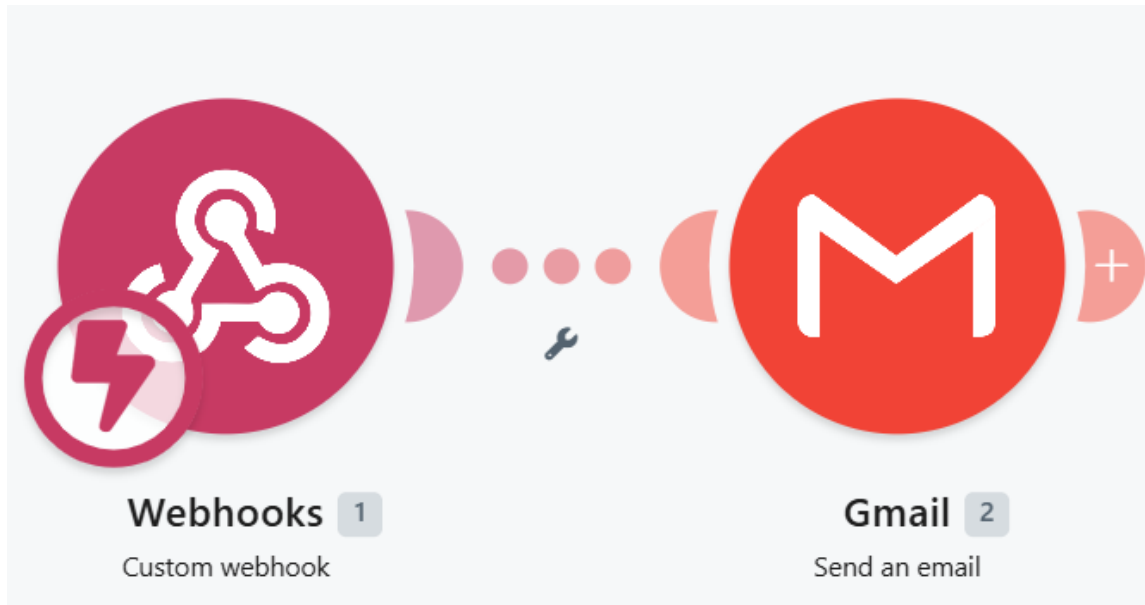
The backend uses Make to handle the confirmation step after a booking is completed.

1 — Booking Webhook

When Emma successfully books an appointment, a webhook fires to Make carrying the patient's name, email, and appointment summary.

2 — Branded Confirmation Email

Make sends a fully branded HTML confirmation email through Gmail, styled with Bright Smile Dental's blue color scheme and including the appointment summary, a note about how to make changes, and a friendly closing message. This replaces what used to be a manual step for front desk staff.



3 — Human Transfer

If a patient explicitly asks for a human, or a critical tool fails more than twice, Emma acknowledges naturally and transfers the call right away — no extended explanation, no delay.

Tech Stack

Component	Tool / Platform
Voice AI Agent	Retell
Automation / Email Confirmation	Make
Appointment Booking	check_availability_cal + book_appointment_cal
Confirmation Email Delivery	Make Webhook → Gmail (HTML Template)
Human Escalation	transfer_call function → Front Desk
Agent Language	English
Timezone	America/New_York (Eastern)

Results

✓	Every inbound call answered consistently — patients get the same calm, clear experience regardless of how busy the front desk is.
✓	Patient concerns are met with empathy first, never rushed straight into questions or booking.

✓	Answers stay within approved information only — no guessing on cost, treatment, or outcomes.
✓	Appointments booked end-to-end over the phone, including name, email, and time confirmation.
✓	Confirmation emails sent automatically through Make — no manual step left for staff to remember.
✓	Patients with urgent or sensitive concerns are still routed to a human when needed, without delay.
✓	Front desk staff freed up to focus on patients physically in the office.
✓	A consistent, branded experience from the first hello to the confirmation email in their inbox.