

INTERACTIVE PROPOSAL · VERSION 2.0

Dental *Concierge*TM

A fully-owned AI patient engagement platform, designed and implemented for the Cleveland Center for Integrative Dentistry.

PREPARED FOR

Cleveland Center for Integrative Dentistry

DATE

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VERSION

2.0

PREPARED BY

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Divigner Group

01. Executive Summary

Infrastructure you own.

Dental Concierge is not software you rent. It is enterprise AI infrastructure that the Cleveland Center for Integrative Dentistry owns, understands, and controls. Divigner designs it, implements it, documents it thoroughly, and remains available as your long-term AI partner, not your gatekeeper.

\$14,500

ONE-TIME INVESTMENT

\$0

SUBSCRIPTIONS OR LICENSING

100%

OWNED BY CCID

24/7

PATIENT COVERAGE

YOU OWN EVERYTHING

Source code. Vendor accounts. Credentials. Infrastructure. Data. Knowledge base. Integrations. There is no vendor lock-in: any qualified technology company can maintain this platform, and we document it so they could. Divigner earns the relationship through expertise, service, and innovation, not through licensing.

Never Miss an Inquiry

Every call, message, and website visit is answered around the clock. For a premium fee-for-service practice, each missed inquiry is a missed relationship.

Premium Patient Experience

Patients receive thoughtful, consistent answers in your practice's voice, at whatever hour they reach out.

Administrative Efficiency

Routine scheduling, confirmations, and intake conversations are handled automatically, returning hours to your front desk.

Consistent Communication

One approved knowledge base drives every channel, so patients hear the same accurate answers by phone, web, and text.

Faster Response Times

Inquiries are engaged in seconds, not returned from voicemail the next business day.

A Foundation, Not a Fixture

The platform extends to new capabilities and affiliated practices without rebuilding, including your anticipated ophthalmology deployment.

HOW THIS PROPOSAL WORKS: 3 SIMPLE STEPS

1. *Review the implementation designed for CCID and everything included in it.*
2. *In Section 06, tap the checkbox on any optional module you would like scoped. Every option starts unselected, and nothing is chosen for you.*
3. *Click **Accept Proposal** at the bottom. Your selections and questions come straight to us, and we respond with a detailed implementation plan.*

02. Practice-Specific Configuration

Designed specifically for CCID.

CCID is a premium, fee-for-service integrative dentistry practice with a high-touch patient experience. Your patients ask sophisticated clinical and philosophical questions, and your systems reflect deliberate choices. This implementation is configured around how CCID actually operates; nothing here is a generic install.

- ✓ **Practice Management System integration:** live scheduling against your existing PMS
- ✓ **Website Concierge:** the same intelligence, embedded on your site
- ✓ **Appointment management:** booking, rescheduling, cancellations, confirmations
- ✓ **Payment deposit workflow:** deposits collected through your existing payment solution
- ✓ **AI Phone Concierge:** 24/7 conversational coverage of your published line
- ✓ **SMS:** confirmations, reminders, and two-way patient texting
- ✓ **Practice knowledge base:** trained on CCID, detailed in Section 03
- ✓ **Administrative automation:** message routing, structured summaries, follow-up tasks

INTENTIONALLY EXCLUDED: INSURANCE WORKFLOWS

CCID operates as a cash-pay, fee-for-service practice and does not participate with insurance. This implementation therefore carries no insurance collection, verification, or eligibility machinery. Your platform stays lean and aligned with how you actually work; you never pay to build, host, or maintain capabilities you will not use.

Two further configuration choices worth noting. Appointment confirmations can be delivered through your existing practice email infrastructure rather than a new subscription, and the deposit workflow is built on the payment solution you already trust. Every Dental Concierge implementation is customized this way: the platform bends to the practice, never the reverse.

03. Practice Intelligence

Trained on CCID, not the internet.

The platform's intelligence comes from a knowledge base engineered from your practice's own materials. The objective is not to teach the AI dentistry; it is to teach the AI how CCID practices dentistry.



ONE APPROVED SOURCE OF TRUTH, EVERY CHANNEL

During knowledge engineering we gather, curate, and structure the materials that define your practice, then review the result with you before anything reaches a patient. Source materials typically include:

- ✓ Your website and educational material
- ✓ Your treatment philosophy and integrative approach
- ✓ Frequently asked questions, answered your way
- ✓ Procedure documentation
- ✓ Videos and PDFs
- ✓ Patient instructions, pre- and post-procedure

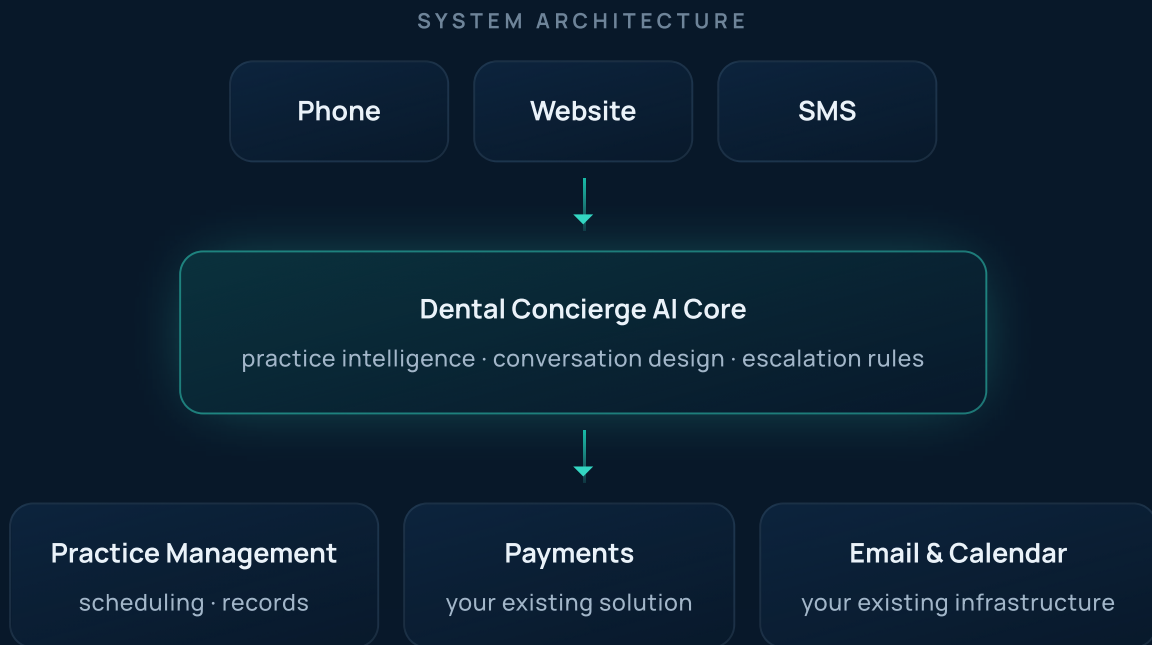
WHY THIS MATTERS FOR CCID

Your patients ask about biocompatible materials, ozone therapy, mercury-safe removal, and the reasoning behind an integrative approach. A generic assistant would guess. Yours answers from CCID's own positions, in CCID's voice, and gracefully escalates anything it has not been approved to address.

04. Platform Capabilities

One platform, every channel.

Conversational AI is one capability of a larger system. The platform connects your patient channels to your practice systems through a core you own end to end.



EVERY ACCOUNT AND CONNECTION OWNED BY CCID

INCLUDED FOR CCID

AI Phone Concierge

Answers your published line 24/7, always identifying itself as an AI assistant. It handles sophisticated patient questions from the approved knowledge base, books and manages appointments, takes structured messages, transfers by your office rules, and escalates urgent situations immediately.

INCLUDED FOR CCID

Website Concierge

The same intelligence embedded on your website. Visitors ask questions, explore your integrative approach, request appointments, and begin intake; conversations share one knowledge base with the phone, so answers never diverge.

INCLUDED FOR CCID

Appointment Management

Real-time availability, booking, rescheduling, cancellations, confirmations, and reminders, synchronized with your practice management system and calendars rather than a parallel schedule.

INCLUDED FOR CCID

SMS Assistant

Two-way texting for confirmations, reminders, and quick questions, with conversation history visible to your team and every exchange grounded in approved content.

INCLUDED FOR CCID

Payment Deposit Workflow

Where your policies call for a deposit, the platform requests and confirms it through your existing payment solution before the appointment is finalized. No new processor, no parallel merchant account.

INCLUDED FOR CCID

Administrative Automation

Structured call summaries, message routing to the right team member, follow-up task creation, and daily digests, so nothing rests on someone remembering to check a voicemail box.

INCLUDED FOR CCID

Practice Management System Integration

Included for CCID as a \$3,000 integration add-on to the base platform. We have already mapped the integration paths for the leading candidate systems, a head start that de-risks scoping and shortens your implementation timeline. Final scope is confirmed against the PMS in use at CCID during discovery.

CAPABILITY	EAGLESOFT	OPEN DENTAL
API available	Yes, Patterson framework	Yes, RESTful API
Architecture	Proprietary, Patterson-managed	Open-source, developer-friendly
Data flow	Via integration framework	Full read / create / update
HIPAA approach	BAA + secure integration	BAA + per-customer API key

05. AI Platform Ownership Package

Documented like it's yours. Because it is.

At go-live, CCID receives a complete ownership package. This is the difference between renting an outcome and owning an asset: everything needed to operate, audit, or transition the platform is delivered to you in writing.

Source Code

The complete codebase, prompts, and configurations, delivered in a repository under CCID's control. Not escrowed, not licensed: owned.

Vendor Registry

A living spreadsheet of every vendor in the platform: purpose, monthly cost, renewal schedule, billing frequency, login URL, credentials, usage limits, and overage pricing. Every account in CCID's name.

Standard Operating Procedures

Plain-language procedures for daily operations, administrative tasks, prompt management, vendor management, and backup and recovery.

Architecture Documentation

Current-state diagrams covering phone, AI, PMS, website, hosting, APIs, knowledge base, email, and SMS, so any engineer can orient in minutes.

Runbook

Operational guidance for monitoring, routine maintenance, incident response, vendor updates, and recovery procedures.

Transition Guide

A step-by-step document explaining how another qualified automation provider could assume responsibility for the platform.

WHY WE DOCUMENT THE EXIT

The Transition Guide exists so you never feel you need it. We would rather keep your business because the work is excellent than because leaving is hard. Transparency is the deliverable; trust is the outcome.

06. Optional Platform Modules

Extend the platform when ready.

The CCID implementation in Section 02 is complete on its own. These modules extend it. **Check any module you would like us to scope**; selected modules are marked for custom scope and priced for your specific workflows.

● INTERACTIVE: TAP TO SELECT

All modules below start **unselected**. Tap a card to add it to your scope request; tap again to remove it. Your choices appear in the summary at the bottom before anything is sent.

Patient Recovery Companion



A secure, time-limited assistant that activates after a procedure and retires when recovery is complete. For a high-touch practice, it extends your standard of care into the hours when patients are home, anxious, and re-reading their instructions.

WHAT IT DOES

- ✓ Explains discharge instructions in plain language
- ✓ Walks through the medication schedule
- ✓ Provides recovery guidance and diet reminders
- ✓ Sends follow-up appointment reminders

GUARDRAILS

- ⛔ Responds only from practice-approved instructions
- ⛔ Never provides independent medical advice
- ⛔ Escalates uncertain questions back to the practice
- ⛔ Provides emergency guidance where appropriate

Internal Staff Assistant



A private assistant for your team, trained on internal SOPs, protocols, and policies. New staff ramp faster, and experienced staff stop interrupting each other for answers the practice has already written down.



Add the Care Plan: \$495 per month, month to month

Security posture, stated plainly.

Patient trust is CCID's core asset. The platform is configured conservatively, documented honestly, and structured so that you always know where every piece of data lives and who can touch it.

a. **Business Associate Agreements**

Executed with vendors that handle protected health information, where applicable. The Vendor Registry records BAA status alongside every account so coverage is auditable at a glance.

b. **Encryption**

Data encrypted in transit across all channels and at rest on supporting vendor infrastructure, using the vendors' native controls.

c. **Authentication & Access Controls**

Role-based access with least privilege, multi-factor authentication on vendor and administrative accounts, and named accounts rather than shared logins.

d. **Audit Logging**

Administrative actions and system events are logged and reviewable, and the Runbook describes how to review them.

e. Transcript Handling

Conversation transcripts are stored in infrastructure you own, with retention windows and access rules set by CCID policy rather than a vendor default.

f. Data Ownership

Every record, transcript, and configuration lives in accounts registered to CCID. If our relationship ended tomorrow, your data would not move an inch.

A NOTE ON CLAIMS

HIPAA compliance is a shared responsibility, not a product feature. Vendors supply capabilities such as BAAs, encryption, and access controls; the implementation and your operating procedures complete the picture. We differentiate clearly between what vendors provide and what the practice must uphold, we document exactly which responsibility sits where, and we do not claim certifications we do not hold.

08. Monthly Operating Costs

Estimated third-party operating expenses.

The platform runs on best-in-class services billed directly to accounts CCID owns. These are planning estimates, not quotes; actual costs scale with call and message volume, and you see every invoice because every account is yours.

VENDOR	ROLE IN YOUR PLATFORM	PLANNING ESTIMATE
Twilio	Telephony and SMS	\$60 – \$175 / mo
ElevenLabs	Natural voice synthesis	\$75 – \$250 / mo
LLM Provider	Language intelligence (OpenAI, Anthropic, Google, or AWS Bedrock)	\$20 – \$200 / mo
Email	Appointment confirmations via your existing practice email infrastructure (Google Workspace at \$14–\$24 per user only if new)	\$0 with existing
Make	Workflow automation	\$29 – \$99 / mo
Supabase	Database and authentication	\$25 – \$50 / mo
Cloud Hosting	Application hosting	\$25 – \$100 / mo

PLANNING RANGE

Approximately \$235 to \$875 per month, excluding subscriptions the practice already owns, such as your existing email infrastructure and payment solution. Costs are paid directly to each vendor, remain under CCID's ownership, and are itemized in the Vendor Registry with renewal dates, limits, and overage pricing.

09. Care Plan & Enhancements

Support on your terms.

The Care Plan is optional. The platform runs without it, and your Ownership Package contains everything required to maintain it independently or through any qualified provider. Two clearly separated ways to work with us after go-live:

Care Plan · \$495 / Month

Optional and month to month: no term contract, cancel anytime. One flat fee covers steady-state stewardship of everything that already exists:

- ✓ Proactive monitoring
- ✓ Vendor updates and API compatibility
- ✓ Security patches
- ✓ Prompt optimization
- ✓ Monthly health reviews
- ✓ Performance reporting

The Care Plan does not include new functionality. It keeps the platform healthy; it does not grow it. And because your Ownership Package documents everything, you are never dependent on it.

Enhancements · Separate Statements of Work

New capability, scoped and priced individually before any work begins:

- ✓ New AI agents
- ✓ New workflows
- ✓ Additional integrations
- ✓ Website redesign
- ✓ Additional locations
- ✓ New automation

Each enhancement begins with a written scope and estimate. You approve before we build; there are no surprise invoices.

10. Implementation Timeline

Eight weeks at most.

A realistic schedule for the CCID configuration, with eight weeks as the ceiling rather than the target. Delivery often lands sooner depending on the requirements workflow: how quickly materials, decisions, and system access come together during discovery. Each stage ends with something you can see and approve.



Discovery *Week 1*

Systems, workflows, escalation rules, and goals. Vendor accounts are created in CCID's name from day one.



Knowledge Engineering *Weeks 2 – 3*

Your materials are curated and structured into the approved knowledge base, then reviewed with your team.



Voice & Channel Configuration *Weeks 3 – 4*

Phone, website, and SMS personas, conversation flows, and the payment deposit workflow.



PMS Integration *Weeks 4 – 6*

Scheduling, lookup, and synchronization built and verified against your practice management system.



Testing *Weeks 6 – 7*

Scripted scenarios, adversarial testing, and escalation drills until the platform behaves correctly under pressure.



Training *Week 7*

Staff training, SOP walkthrough, and administrative handover, including the full Ownership Package.



Go Live *Week 8 at the latest*

Supervised launch with daily check-ins through stabilization. Stages that finish early pull everything after them forward.

11. Cross-Practice Deployment

Built once, deployed again.

A future deployment to your affiliated ophthalmology practice is anticipated, and the platform is architected for exactly that.

a. Each practice gets its own instance

Separate AI, separate branding, separate phone number, separate knowledge base, and separate integrations. Patients of each practice experience a platform built for that practice alone.

b. The platform is not rebuilt

Architecture, integration patterns, automation, and hard-won lessons carry over. Subsequent deployments require meaningfully less implementation effort and cost than the first.

c. Ownership repeats

The affiliated practice owns its instance exactly as CCID owns this one: its own accounts, its own data, its own documentation.

12. Review & Accept

Your Dental Concierge.

Here is everything you have selected. Add any questions or comments, then click Accept. We will follow up with a detailed implementation plan and any custom-scope pricing.

YOUR CONFIGURATION

✓ **CCID Implementation:** one-time \$14,500

\$11,500 platform implementation + \$3,000 PMS integration. The full configuration in Section 02, delivered with the complete Ownership Package. No subscriptions or licensing fees.

No optional modules selected yet. The CCID implementation is complete on its own; Section 06 lists the available extensions.

QUESTIONS & COMMENTS

ANYTHING YOU WOULD LIKE US TO KNOW?

Your practice management system, phone setup, timeline, questions about any module or the Ownership Package...

✓ **ACCEPT PROPOSAL**

Clicking Accept sends your module selections and comments to Divigner Group. It expresses intent to move forward and requests custom scoping; it is not a binding contract and no payment is collected.



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