

IMPLEMENTATION GUIDE · 2026

30-Day Aria Onboarding Playbook

A week-by-week implementation guide for new Aria customers — what to do, who owns it, and how to measure success in your first 30 days.

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— Day 0 — Kickoff and configuration

Day 0 is the kickoff call between your team and your Aria implementation lead. The goal: walk through your practice, capture configuration, and set the schedule for the rest of the launch.

Attendees: practice owner or office manager, your Aria implementation lead. Optional: front-desk lead, IT contact if you have one.

Deliverables produced on this call:

- Practice profile completed: name, address, hours, providers, services, target patient mix.
- PMS confirmed (Open Dental, Dentrix, Eaglesoft, Curve, Carestream, Practice-Web, or no-PMS).
- Voice persona selected (greeting style, voice ID, language defaults).
- Calendar integration provider chosen (Google Calendar, native PMS, or both).
- Insurance configuration: payers you accept, eligibility-check defaults.
- Payment configuration: Stripe account, payment-link defaults, deposit policy if any.
- Escalation rules: when does Aria transfer to a human, and to whom?
- Communication: what's your preferred Aria team contact channel for the next 30 days?

— Days 1–4 — Voice, chat, and integrations

The four-day technical sprint. Your Aria team configures, integrates, tests. Your team's job: respond to questions within 4 hours during business hours. Most days you won't hear from us — we're working.

Day 1: Voice configuration

Voice agent created on Retell with your selected voice, greeting, and language defaults. Inbound webhook set up. Phone number provisioned and forwarded test calls confirmed.

Day 2: Chat widget + integrations

Chat widget configured for your website. Calendar integration tested with sample bookings. Stripe configured with test charge. Twilio SMS sender provisioned (10DLC if needed).

Day 3: PMS integration (if applicable)

PMS credentials configured. Read tests pass: patient lookup, appointment availability, provider list. Write tests pass in sandbox: appointment creation, patient creation if new.

Day 4: Insurance + escalation

Stedi eligibility-check configured for your top-5 payers. Escalation rules tested: cold transfer, warm transfer, voicemail handoff. Final review of voice prompt with your input on tone.

— Pre-launch checklist

Before pilot launch on Day 5, your Aria team will confirm every box below. You don't have to do anything — this is for your awareness.

- Voice agent answers test calls in your selected voice and language.
- Chat widget loads on your website and books a test appointment.
- PMS write-back works for new and returning patients (if PMS-integrated).
- Calendar integration creates and updates events correctly.
- Insurance eligibility check returns expected response for your top payers.
- Stripe charges or sends payment link mid-call when configured.
- Escalation transfers to your front desk's number.
- After-hours behavior matches your specification (24/7 vs. business hours).
- BAA signed and on file (we send same day on Day 0).
- Practice owner has access to admin dashboard.

— Day 5 — Pilot launch with limited routing

On Day 5, Aria starts taking real calls — but only during business hours, and only routed from your test number. Your front desk continues to take calls on the main line.

The goal of Day 5 is to confirm that real patient calls flow through Aria correctly with no rework. Your Aria team monitors every call live; your front desk reviews call transcripts with us at end of day.

Decision at end of Day 5: green-light for full launch on Day 6, or pause for one more day of tuning. We'll recommend; you decide.

— Days 6–7 — Full coverage + 24/7 go-live

Day 6 brings Aria to full business-hours coverage on your main line. Day 7 extends to 24/7. Most practices see their first after-hours booking within 48 hours of 24/7 go-live.

What changes for your front desk on Day 6:

- Inbound calls go to Aria first; calls that need human help transfer to your front desk's queue.
- Front desk receives email summary every morning of overnight bookings, leads, and escalated calls.
- Admin dashboard becomes the single source of truth for call volume, bookings, and revenue captured.
- Front desk uses Aria's transcripts to confirm details before patients arrive.

— Week 2 — First measurement window

Week 2 is your first real measurement window. By now you have 5–7 days of full coverage data. Here's what to look at, and what 'normal' looks like.

Metrics to review weekly:

- Call volume vs. baseline. (Expected: 10–25% higher because no calls go to voicemail.)
- After-hours call capture rate. (Expected: 100% if 24/7 enabled.)
- Booking conversion rate per channel. (Expected: 30–55% on inbound.)
- Insurance verification throughput. (Expected: 80–95% pre-verified for in-network.)
- Escalation rate. (Expected: 8–18% of calls transfer to human.)
- Patient satisfaction signals (post-call SMS feedback when enabled).

— Week 3 — Optimization pass

Week 3 is when we tune. Based on the Week 2 data, your Aria team makes 3-7 optimizations: voice prompt tweaks, escalation threshold adjustments, payer eligibility configuration, common-question additions to the FAQ knowledge base.

Common Week 3 optimizations:

- Add common patient questions to FAQ knowledge base (drives chat self-service rate up 10–20%).
- Tune voice prompt for any consistent caller confusion patterns identified in Week 2 transcripts.
- Add or remove escalation triggers based on actual transfer reasons.
- Adjust SMS reminder timing to your patient base (some respond better at 24+2 hours, some at 48+4).
- Update business hours configuration if the Week 2 data shows pattern shift.
- Add or remove payers from real-time eligibility based on actual call mix.

— Week 4 — 30-day review + retention

End of Day 30 — your Aria team books a 60-minute review call. We walk through every metric, identify what's working, identify what's not, and build the 60-day plan.

30-day review agenda:

- Headline metrics: total calls handled, total bookings, missed-call recovery, after-hours capture, revenue captured.
- Compare to your baseline (your pre-Aria reality) and the targets we set on Day 0.
- Identify the top 3 wins and the top 3 areas of friction.
- Decide on Aria's role expansion — more services, more channels, more locations.
- Confirm or revise the role-expansion path: overflow → hybrid → primary front-line.
- Set the next milestone (60 days, 90 days, end of quarter).

— Roles, owners, and SLAs

During the 30-day onboarding, here's who owns what:

Aria implementation lead

Owns Days 1–4 technical work. Available 9am–6pm PT business days. Response SLA: 4 business hours.

Aria CS lead

Owns Days 5–30 ongoing optimization. Available 9am–6pm PT business days. Response SLA: 4 business hours.

Practice owner / office manager

Owns kickoff configuration decisions, weekly review calls, and final go/no-go on Day 5–6 launch.

Front desk lead

Owns transcript review at end of Days 5–7, escalation routing confirmation, and Week 1 daily check-ins with Aria team.

— Success metrics framework

Whatever specific metrics you choose to track, anchor them to two questions:

(1) Are we capturing more of the patient demand we're already generating? (Recovery metric.)

(2) Are we converting more of the captured demand into booked, paying appointments? (Conversion metric.)

Most practices that measure these two metrics see meaningful improvement on both within 30 days. The recovery metric typically improves first (week 1–2), the conversion metric typically improves more in week 3–4 once optimization has settled.

READY TO START?

AriaDental.AI / demo

Book a 30-minute kickoff call. We'll get you to Day 7 in 7 days.