



# THE PROGRESSIVE ORTHODONTIST

DR. PATRICK ASSIOUN  
*Living the American Dream*

## BUSINESS PRACTICE & DEVELOPMENT

Growth Decision & Practice Journey

BY DR. SCOTT LAW

## MARKETING/SOCIAL MEDIA

Changing Consumer Habits and Marketing For 2015

BY ANGELA WEBER

## TEAM DEVELOPMENT

15 Key Points to Improve Your New Case Acceptance

BY CHARLENE WHITE

Q4 2014



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## EDITOR'S NOTE

Hard to believe we are approaching the end of 2014. Where has this year gone? Seems just a few months ago we were setting resolutions, committing to new diet or work-out plans and making a list of goals for the New Year. As we reflect on the year, 2014 has certainly seen some major changes with the Progressive Orthodontist and we are excited about the direction we are headed for 2015. Change is good!

I would like to take this time to thank all of our advertisers, contributors, and staff writers for your wonderful support throughout the year. Without you, this magazine would not be possible and we greatly appreciate the time and financial commitment you have given. We are rapidly becoming the most successful publication in the industry and for that we thank – you the SUBSCRIBERS!

For our 2014 closing edition Cover Doc, we thought it only fitting to feature one of the country's top orthos – Dr. Patrick Assioun. (See our cover story pages 30-36). I was inspired by his story and have a tremendous amount of respect for the level of commitment and dedication that he has given to his education and career. We look forward to seeing what the future holds for Dr. Assioun and we're sure he will help lead the profession towards its next iteration.

We are also excited to announce a new section of the magazine called

*“Change is the law of life. And those who look only to the past or present are certain to miss the future.”*  
–John F. Kennedy

Young-Docs. Over the past several months, ProOrtho and DENTSPLY GAC have been busy building this new Study Group for orthodontic residents and orthodontists in practice for less than five years. The closed Facebook group was created to reduce the learning curve new doctors encounter by having more experienced doctors available and accessible. By sharing failures and successes, we hope to help younger doctors avoid the problems and pitfalls that are all too common. Check it out and send us a request to join at [Facebook.com/groups/GACyoungdocs/](https://www.facebook.com/groups/GACyoungdocs/)

And, as the end of the year draws near, we have offered some Holiday Gift Ideas in our Lifestyle Section. For you last minute shoppers – you are welcome!

From everyone here at The ProOrtho Magazine, we wish you, your families, and your team a wonderful Holiday Season and we look forward to the exciting changes that 2015 has in store for us.

PUBLISHER  
SmileMedia, LLC

EXECUTIVE EDITOR  
Terri Rice  
[terri@smilemediallc.com](mailto:terri@smilemediallc.com)

CONTENT ADVISORS  
Ben Burris, DDS, MDS  
John Graham, DDS, MD  
Scott Law, DDS, CAGS  
Lou Shuman, DDS, CAGS  
John McManaman, DDS, MDS

CREATIVE DIRECTOR  
Sherri J. Dewig



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\* Reduction of soreness based only on patient/doctor feedback.

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# CONTRIBUTORS



**BEN BURRIS** DDS, MDS  
*Article on page 10*

Contrarian, philanthropist, rabble-rouser, thought leader, business man, loud mouth, prime mover and visionary. These are but a few of the terms used to describe Ben Burris. No matter which label you choose or what personal opinions you hold, none can deny that Dr. Burris continues to change the conversation in dentistry - especially in orthodontics.

Burris is a doer with an uncanny eye for finding opportunities to improve and an unflinching resolve to pursue and implement positive change above all else. Dr. Burris graduated from The Citadel, in Charleston, SC, with a BS in biology prior to receiving his DDS from the University of Tennessee - Health Science Center's College of Dentistry in 2001 where he then completed his orthodontic residency and received his MDS in 2004.

As a clinical professor at Roseman University, owner of one of the largest practices in North America, creator of Smile for a Lifetime Foundation, co-owner of The Progressive Orthodontist Magazine and Study Group and key opinion leader to some of the industry's heavy hitters, Ben brings unparalleled perspective to the conversation. More than anything, Ben enjoys teaching the business of running a practice and providing real-world tips on managing a successful dental business. Ben can be reached at [bgbdd@yahoo.com](mailto:bgbdd@yahoo.com)

**DAVID BUTLER**  
*Article on page 50*

Dr. Butler received his dental school training at the Oregon Health and Science University School of Dentistry, where he graduated with honors. He then went on to complete his orthodontic training at the University of Louisville, where he served as Class President and earned both a certificate in Orthodontics and a Master's degree in Oral Biology. During his education, he also participated in several research projects and was the recipient of numerous awards. Due to his excellence in clinical skills, Dr. Butler was also invited to serve as a teacher both during dental school and residency.

A self-diagnosed "tooth nerd," Dr. Butler wants his patients to not only have straight teeth and a healthy, stable bite, but also a confident smile that lights up the face and reflects the patient's unique personality. What really makes his day is seeing the changes, not only in the patient's teeth, but in their lives as well.

After graduating, Dr. Butler practiced in Texas but is now truly excited to be back with his family and friends in the Northwest and providing top-quality orthodontic treatment in Richland, Washington. He lives in Kennewick with his wife, Briana, their sons Trenton and Dallas, and daughters Brooklyn, Lexi and Ali.

He is an avid golfer and outdoorsman and enjoys camping, fishing, and nature photography.



**GARRETT B. GUNDERSON**  
*Article on page 26*

A passionate, natural-born entrepreneur, Garrett became a multimillionaire by the age of 26 and has dedicated his life to teaching others the same economic principles that he has lived by. Freedom FastTrack is the direct result of his desire to teach others the economic principles to freedom that have gotten him where he is today.

Garrett has become a founder, partner, or executive of several successful companies including Freedom FastTrack and The Accredited Network. He is the NY Times Best-selling author of Killing Sacred Cows: Overcoming the Financial Myths That Are Destroying Your Prosperity.

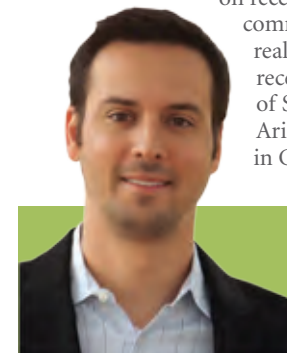
He resides in South Jordan, Utah, with his wife Carrie and sons Breck and Roman.

[g@freedomfasttrack.com](mailto:g@freedomfasttrack.com) | [freedomfasttrack.com](http://freedomfasttrack.com)

**WAYNE PEARSON**  
*Article on page 44*

Wayne is the Chief Operating Officer for Gateway Ventures, L.L.C. - one of the largest privately held orthodontic practices in North America. Pearson is an entrepreneur and executive manager with 10 years of continuous success developing, implementing, growing, and improving the performance and profitability of start-up to mid-sized organizations. He is an experienced innovator, researcher, developer, implementer, manager, and leader. Before moving to Arkansas, Pearson was President of SwapSmart in Phoenix, AZ for five years where he developed business models and financial plans for indoor mini-mall concepts that capitalized

on recessed demand in commercial big-box real estate. Wayne received his Bachelor of Science degree at Arizona State in 2003 in Communication Services and Politics.



**SCOTT LAW**  
*Article on page 52*

Dr. Scott Law is a leader who is willing to take risk for the betterment of the industry. He has made and continues to make many investments in ways to help patients and orthodontists succeed. Scott Hudsmith is an entrepreneur that has been successful in several organizations over the past 25 years. He has been CEO, President, COO, CFO and he has led the sales and marketing efforts at many of the organizations. The combination of Dr. Law's industry leadership and Scott's experience make for a unique formula that will no doubt lead to an amazingly successful Orthodontic focused business.





**ANGELA WEBER**  
ORTHO SYNETICS MARKETING DIRECTOR  
*Article on page 30*

Angela Weber is the Chief Marketing Officer for OrthoSynetics a company which specializes in business services for the orthodontic and dental industry. She leads a team of marketing professionals dedicated to developing and implementing cutting-edge strategies and solutions for their members.

Angela has over 15 years of experience in the advertising industry with a vast knowledge of current and past trends, philosophies and strategies for marketing within the healthcare industry. Angela has a proven track record of driving new patient volume through innovative marketing practices.

Angela holds a B.A. in Mass Communications from Louisiana State University and an M.B.A. from the University of New Orleans.

**ADAM MEAD**  
LANCING NARWHAL, YOGG  
*Article on page 20*

Adam Mead is a husband, father of seven beautiful children and the owner of yogg – a full-service branding agency based in Richmond, Virginia. He began his career in the creative services industry as a Sandwich Artist at Subway while earning his Bachelor’s in Creative Advertising from Virginia Commonwealth University. After starting yogg in 2007 from the corner of his master bedroom, the agency has grown exponentially under his leadership to serve clients in multiple industries all across the country. Mead, an expert witness in branding and marketing, has won awards for both design and copywriting and has had his logo work featured in international publications. At the end of the day though, none of that matters to him. Successful clients and a family who loves him despite his many flaws is all that truly matters. Well, that and plenty of Nutella in the cupboard.

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**LOU SHUMAN** DMD, CAGS

Dr. Shuman is the President of Pride Institute, a renowned practice management institute and is personally known for his expertise in internet strategy, strategic relations, emerging technologies, digital marketing methods, and operational practice management. He is the only dentist who has been selected both as a “Top CE Leader in Dentistry” and a “Leader in Dental Consulting” by Dentistry Today magazine.

Prior to becoming President of Pride Institute, Dr. Shuman served as Vice President of Clinical Education and Strategic Relations at Align Technology for seven years. Dr. Shuman is recognized as an outstanding speaker and educator and has lectured extensively throughout the United States, Canada, Europe, and Japan, including every major meeting in the US.

He received his DMD degree and his Certificate in Advanced Graduate Studies in Orthodontics from the Henry M. Goldman Boston University School of Dental Medicine.

**CHARLENE WHITE**  
*Article on page 24*

Charlene White’s expertise and depth of knowledge in the orthodontic specialty is world renowned. Charlene graduated from Old Dominion University in 1975 and spent the next five years as a RDH and office manager. She founded her company, Progressive Concepts, in 1983. She has successfully consulted in over 750 orthodontic practices in 29 years, interviewed over 7,000 team members, presented over 300 Continuing ED courses, is a highly sought after industry speaker, and has written and filmed 20 training products. She partnered with Dolphin Management to create the “Charlene White SOS” computer module. She consistently hears from program directors, “We are so excited about the turnout for our event.” Charlene is passionate about orthodontics. Her energy and enthusiasm for her clients and teams to succeed is unparalleled. Innovative, hard working, and down to earth describe Charlene. Charlene is currently serving on the Board of Directors for Smiles 4 a Lifetime. Charlene is a Norfolk, VA native, an avid reader, and a passionate golfer.



**DR. MARK BRONSKY**  
*Article on page 14*



Dr. Mark J. Bronsky is a New York native who earned his bachelor’s degree in biology from Trinity College (1983) before earning a dental degree from the University of Alabama School of Dentistry (1987), where he was salutatorian, President of the UAB School of Dentistry Student Government, and special appointee to the UAB presidential search committee. Subsequently, Dr. Bronsky completed a post-graduate specialty residency where he earned both a Certificate in Orthodontics and a Masters of Science in Endocrinology at the University of North Carolina at Chapel Hill (1989). Following residency, Dr. Bronsky completed a year of Fellowship Study in Europe under the auspices of William R. Proffit, DDS, PhD, Dr. Bronsky’s thesis advisor and mentor at UNC. An esteemed member of the orthodontic community, Dr. Bronsky is a Diplomate of the American Board of Orthodontics, and an inductee into the Edward H. Angle Society of Orthodontists. Dr. Bronsky is also a frequent national and international lecturer, on a wide variety of orthodontic and oral health topics.

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CONGRATULATIONS TO DR. MICHAEL ZETZ AND HIS TEAM FROM DANIELS ISLAND, SC ON THEIR NEW NON-PROFIT.



(FROM LEFT TO RIGHT) LOCAL BOARD MEMBER, MELISSA TURNER AND PROGRAM DIRECTOR, PAMELA LACK SERVING WITH S4L STONE OAK ORTHODONTICS SAN ANTONIO CHAPTER WITH DR. "TITO" NORRIS AND MICHELLE VON FANGE S4L NATIONAL EXECUTIVE DIRECTOR.



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\* Weber II, D.J.; Koroluk, L.D.; Phillips, C.; Nguyen, T.; Proffit, W.R.: Clinical effectiveness and efficiency of customized vs. conventional preadjusted bracket systems, *J. Clin. Orthod.* 47(4):261-266, 2013.

# AcceleDent & Orthodontext

OrthoAccel® Technologies, Inc. announces a first-of-its-kind partnership with Orthodontext, a service that allows orthodontists to send their patients customized text messages reminding them to use their AcceleDent® for 20 minutes daily. Patient compliance is a key component of the effectiveness of AcceleDent, which is a noninvasive FDA-cleared, Class II medical device that speeds up orthodontic treatment by as much as 50 percent. Doctors have found that the text reminders have tremendously helped them save money by reducing the number of unnecessary appointments caused by noncompliance.







investment portfolio and financial credentials before handing over your hard earned money?

- b. While on the subject, we should ask any orthodontist who is advocating a system or product to prove that what they are asking us to buy is good for our practices. How? Easy! Ask to see:
  - i. The first page of the speaker's tax return
  - ii. A printout of production and collection from his or her management software
  - iii. How much they are being paid by the company they are advocating for
  - iv. I've heard of many, many cases where the KOL's (key opinion leader) paycheck from the corporation they are advocating on behalf of is a substantial portion of their income (if not the majority) because using the technology in their practice tends to nudge up the overhead a bit. I've also witnessed cases where KOLs are in massive debt to the service or product provider and the only reason the company doesn't demand payment is because the doctor speaks on the company's behalf.
  - v. I would like to see a world where the first three slides of any power point given by a speaker divulge their financial and practice information. How else can you judge what's being sold to you?
  - vi. Yes, I'll have my tax returns handy at speaking engagements in the future...

**2** Seek out advisors who are not "dental specific".

- a. We are told that we should use accountants and marketers and consultants who "know our industry" and this makes sense to us

because we don't know much about anything other than straightening teeth. I did this for years.

- b. The truth is that business is business. You control the treatment side of your practice without interference from non-orthodontists so there is no reason to fear professionals from outside dentistry. In fact, if you want the maximum competitive advantage, why would you want people who do it the same as we have always done it? The world has changed!
- c. Using a proper firm is especially applicable when it comes to accountants and marketing folks. Use a large, broad based, national accounting firm – they know lots of ways to save you money because they have seen the techniques used in other industries. There is almost zero advantage to using someone who focuses on "dental accounting". When it comes to marketing, be sure the firm or person you choose has been successful in other arenas and isn't just a "dental marketer". Those who have not done anything outside of dentistry are severely handicapped when it comes to marketing strategy, creativity, budgeting, buying power and execution.

**3** Seek out and join study groups that don't just talk about teeth. Orthodontic study clubs have been around since Dr. Angle but business-focused groups are relatively new. It takes effort, time and money to be involved but it is worth it! Below is a list of the groups I'm aware of with commentary that is 100% my opinion. Feel free to email me and let me know if I missed something or am off base. The purpose of this list is to increase awareness of groups that make us stronger individually and as a profession (as opposed to our member organization that just collects and

spends our dues money):

- a. The Continental Study Club – As far as I can tell, this is the oldest, national, business focused, orthodontic study club. Started in the 1970's, this group of African-American orthodontists gets together annually to compare notes, enjoy the fellowship of peers and improve their businesses. I was lucky enough to speak at the Continental Study Club's annual meeting this year and I will tell you this is a delightful but serious group of professionals working to help one another and the profession. I would strongly consider joining should you be invited!
- b. The Schulman Study Group – formed by Bud Schulman and led by Dr. Ron Redmond, the SSG is a perennial powerhouse. Geographically exclusive and heavily business oriented, the SSG led the way for other orthodontic business groups. Membership is very exclusive and passes, along with practice ownership, to the next generation. One must be invited to join the group and you should seriously consider joining if you get the chance. The SSG uses an email listserve and an annual meeting at various exotic locations to help one another and grow their practices while strengthening the profession. The SSG annual meeting is a weeklong affair that involves member presentation and usually some outside consultant as well as an address from John McGill. The SSG has some of the largest practices in North America as well as a very seasoned and successful general membership. I had the privilege of being an SSG member for several years and learned a lot during that time.
- c. The Progressive Orthodontist Study Group – I started this group a few years ago to focus exclusively on the business side of orthodontic

practice. The theory being that there are plenty of places to talk teeth and orthodontists tend to get a little distracted from other aspects of what we do when tooth talk is an option. ProOrtho is a geographically exclusive meritocracy that communicates via a closed Facebook group (recently changed over from an email listserve due to the volume of emails) as well as rather informal meetings/gatherings – usually associated with other ortho meetings. ProOrtho has some of the largest practices in the country as well as a plethora of young guns and rising stars. If your area is still available, you would do well to apply for membership!

d. ProOrtho Fully Engaged – The president of ProOrtho, Dr. Scott Law, and I find consistently that a small but substantial subset of any group of

orthodontists (say 10 percent or so) tend to be a incredibly OCD when it comes to growing their business. For that reason, we separated those of us who others consider a bit crazy from the larger group to form FE. With less than 30 hand picked doctor members, ProOrtho FE discussions and annual meetings are a little different than the traditional format. On the first day of the meeting, we visit a member office, observe a half-day of practice and hear from the member’s team and host doctor as a group. Every year we take our key employees – office managers, TCs, marketing people, collections/ insurance folks – and they get to interact with each other and the host’s team. On the second and third day, we break up into round table discussions with one room for the doctors as well as one for each employee type. Maximum information exchange,

implementation planning and problem solving are the goal and everyone who’s attended an FE meeting says it’s like nothing they’ve ever experienced.

e. SC2 – Karen Moawad of Hummingbird Associates sets up study groups for her clients to get together and discuss business. I’ve never attended one but have heard from many participants that they are wonderful meetings where the level of discussion and depth of knowledge is fantastic. I also hear there is a group of her clients who have spun off to form their own, yet unnamed business study group and I’m hoping to get an invite to their next meeting!

f. The Pitts Progressive Study Club - Started in 1979 by Thomas Pitts has a focus on excellence in facial and smile esthetics but over the years has increased its business and marketing

**LEARN & LEAD**



discussion. Participation takes place via email and an annual meeting in the US or international destination. Membership is by invitation only with a strong emphasis on sharing and helping others. The positivity and giving attitude within this group is of great importance for continued affiliation. As J.J. Watt said, “You never own success, you just rent it”.

g. 360 Summit Study Group – Mary Beth Kirkpatrick put this group of orthodontists together to enhance professional relationships and study together to improve practice performance, profitability and quality of life. I haven’t attended these meetings but I have heard great things and all agree it is well worth the time and effort to be involved.

h. Orthodontic Exchange – Founded by Dr. David Butler, OE is a great resource for orthodontists wanting to discuss clinical and business issues. This diverse group of practitioners offers a broad cross section of models and styles. Dr. Butler harnessed the power of Facebook to foster collaboration and interaction without crushing email volume. ProOrtho changed from email to Facebook after seeing what OE was doing. Thanks David for brining us into the modern era of communication! Find OE on Facebook and apply to join!

i. GR8 – Recently, I was lucky enough to spend the weekend with a group of St. Louis grads that get together annually to play golf, look at cases and talk business. They say the inspiration for their meeting was Dr. Gus Sotiropoulos – “the oldest living and longest standing orthodontic educator and practitioner of all time”. Not only did I pick up some pearls, my faith in the resilience of our profession was restored. A nicer group of capable and well-spoken orthodontists I can’t imagine. It was a

great reminder that we all need to get out of our office and associate with peers regularly just to keep in touch with reality. All of the guys in the group are successful and through the rising tide of open sharing, they’ve all achieved more. I think the profession would benefit greatly if this was a more common occurrence. Call your fellow alums and get together! It’s worth the time and money it takes.

j. Young-Docs Study Group – ProOrtho partnered with Dentsply-

*We must, as individuals and as a profession, educate and protect ourselves. We must do things to the highest possible level and not just the way we have always done it.*

GAC to create a closed Facebook group specifically set up for residents and doctors out less than 5 years. The older docs answer questions and post info for the residents and young doctors to help them succeed by sharing things we wish we had known earlier. There is no geographic exclusivity in this group and all are welcome. The whole purpose is to strengthen our profession one orthodontist at a time through education. Find Young-Docs on FB and join us.

k. Law, McManaman and Burris Preferred Vendor Group – This is another closed Facebook group

designed for open exchange of information. Orthodontists, residents, vendors, coaches, service providers and consultants are welcome to join. It’s a great place to find out what kind of options there are for a given class of products or service. Join the group and the conversation if you want to see what it is all about. Together we can strengthen the profession by helping one another succeed.

l. Wired Differently – Angela Weber started this closed Facebook group to help orthodontists understand the intricacies of marketing and branding in the modern world. Her insights are useful and enlightening for anyone looking to tighten up their branding or ramp up marketing effectively. The group is for orthodontists and residents only.

We must, as individuals and as a profession, educate and protect ourselves. We must do things to the highest possible level and not just the way we have always done it. These are just a few suggestions designed to start us thinking and talking about what we can do to insure patients have access to specialty care for decades to come.

As you can see there are tons of existing opportunities help yourself and your business but if none of these appeal to you then why not design and start your own? The point is that our profession is being accosted from all sides and no one will help us. We must help ourselves, educate ourselves and adapt to the new reality that is modern orthodontic practice while looking out for the best interests of our patients and the public. It has become readily apparent that our member organization cannot and will not oppose those who would push us down the path paved by the Prosthodontists. It’s time to stop griping about what the leadership and committees of our member organization are not doing and take matters into our own hands.



## PAYMENT PLAN COMPANIES

### *What Works for Us*

By Dr. Mark Bronsky

“In the olden days,” laughs Dr. Mark Bronsky, “office and financial management took a great deal of my staff’s time.” Delinquent accounts, manual billing, and a fulltime accounts receivable employee were just part of the process.

“If a patient could not pay their bill in its entirety,” Dr. Bronsky recalls, “my staff was responsible for running a credit report, establishing payment amounts, sending out monthly statements, and following up on delinquent accounts.” To him, it was the unpleasant side of orthodontics...draining the staff’s time and emotional well-being. “Let’s face it,” he laments, “no one wants to be a bill collector.”

That unpleasant side of orthodontics has changed. Establishing, and then managing patient accounts for a set monthly fee, has been revolutionized by risk assessment and payment management providers like OrthoBanc.

“My staff merely offers a payment plan to the patient,” Dr. Bronsky advises. “Then this company takes over, completely!”

Payment plan companies such as OrthoBanc conduct credit checks, establish payment plans, secure

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*There have been so many stories in the news about credit card information being stolen. An orthodontic office typically doesn’t have the secure systems in place to protect their practice from this kind of breach.*

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accounts with a credit card or automatic withdrawal from the patient’s bank account, and monitor the account monthly. This is all very easy for staff to facilitate.

Dr. Bronsky’s team no longer sends out monthly statements or makes those dreaded late-payment calls. Instead, OrthoBanc automatically drafts the monthly payment each month. If a

payment draft fails, they contact the responsible billing party to reschedule that draft. This payment management system has provided many benefits, including streamlining payment procedures, grouping payments for posting, and automatically importing the information into Dr. Bronsky’s system. He and his staff are no longer involved. They are busy marketing for new patients, establishing customer relationships, and improving patient care.

Dr. Bronsky reminds us, “This company is also responsible for maintaining my patients’ personal financial data, which is a huge relief for any orthodontic practice.” Customers can print receipts directly from the company’s secure website.

We asked OrthoBanc representative, Marla Merritt, about this important feature of their services. “There have been so many stories in the news about credit card information being stolen. An orthodontic office typically doesn’t have the secure systems in place to protect their practice from this kind of breach.” Merritt adds, “One office that we signed up recently told us they maintained credit card numbers with expiration dates in a spiral notebook at the office! Can you imagine what would have happened to





their reputation if that notebook would have “walked off” exposing all of their patients to potential fraud?”

Dr Bronsky states that offering a no-or low down payment option for orthodontic treatment is a great way to win the hearts and (business) of new patients. Most patient payment plans do not go beyond their treatment schedules, but some do. Using a 3rd party to manage these payment plans greatly increases the likelihood that these payments will continue to arrive on time each month. Dr. Ricky Caples of Caples and Robinson Orthodontics in Monroe, Louisiana said “We have 99 things to think about. Getting paid isn’t one of them!” Candice Bailey, Treatment Coordinator for Fender-Goggans Orthodontists in Douglas, Georgia, said the payment management system they use makes “getting paid effortless.”

Dr. Bronsky believes using a specialized payment service has reduced the financial risk formerly associated with payment plans and he also finds that patients are less likely to postpone crucial orthodontic

care when offered a flexible payment schedule. He states that he has never had a complaint about the management system’s service. It is a user friendly program for both his patients and his staff. He jokingly refers to OrthoBanc as “an employee who never takes time off.”

Other practices echo this sentiment. “Patients, along with our staff members, have a consistent positive experience with this company. Utilizing our payment management system to draft and manage our accounts allows our staff to spend

more quality time with patients – so our practice can grow and become financially stronger,” states Jeanne Fravel, wife and financial coordinator of Dr. W.K Fravel in Ocoee, Florida.

As competition in this industry becomes more intense, it is important that orthodontists streamline office efficiencies and offer flexible payment options. Using a 3rd party payment management company can help with both of these crucial tasks.

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Dr. Carlyn Phucas, Orthodontist, Carlyn Phucas Orthodontics, Marlton, NJ

*"We have 99 things to think about—getting paid isn't one of them! OrthoBanc makes it easy!"*

Dr. Ricky Caples, DDS, Orthodontist, Caples & Robinson Orthodontics, Monroe, LA

*"OrthoBanc is our favorite A/R Coordinator ... and she never even takes a day off!"*

Michele Weir, Office Manager, Bronsky Orthodontics NYC, New York, NY

*"I have been working with OrthoBanc for 10 years and I have received the highest quality of customer service with our patient accounts. OrthoBanc makes my job so much easier!"*

Cheryl Huggins, Financial Coordinator, Franklin & Collins, LLP, Austin, TX

*"Patients, along with our staff members, have a consistent positive experience with this company. Utilizing OrthoBanc to draft and manage our accounts allows our staff to spend more quality time with patients so our practice can grow and become financially stronger."*

Jeanne A Fravel, Office Coordinator, W.K. Fravel, DMD, PA, Ocoee, FL

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## GETTING TO KNOW

### *Dr. Derek Straffon*

“Everything is better customized.” This is just one of the standout practice mottos that Dr. Derek Straffon and his staff live by—so much so that they even considered ordering t-shirts that sport the saying. Straffon Orthodontics<sup>™</sup>, located in Denver, Colorado, is rooted in premium patient care, cutting-edge technology and smile customization. It’s a place where nothing short of the best will do.

In this issue, we’re getting to know Dr. Straffon whose love for the orthodontic craft is infectious. Pursuing a profession that runs in his blood, Dr. Straffon’s devotion to creating beautiful customized smiles for every patient who walks into his office is exceptionally admirable. If you weren’t impressed already, Dr. Straffon is also an avid athlete with a passion for Colorado’s skiing and biking.

**ProOrtho:**  
**How did you get your start in the orthodontic field?**

**Dr. Straffon:**

I have to give credit to my dad. My father was a pediatric dentist and I source much of my inspiration to pursue a career in the dental/orthodontic field from him. My uncle was also a dentist so to say I had some exposure to the profession growing up would be an understatement!

When I went to college, and began evaluating my career options, it became obvious what path I wanted to take. My dad and uncle have been outstanding

professional examples. From the way they cared for their patients to their dedicated mastery of their craft, they’ve been role models for how to thrive in this profession and enjoy it.

Additionally, I have to give credit to my mentors at the University of Michigan where I received my Masters of Science degree in Orthodontics. Each of my mentors and peers, including Drs. Lysle E. Johnston, Jr. and James A. McNamara, Jr., at one point or another, enabled, challenged and encouraged me to be a better orthodontist.

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*“My father was a pediatric dentist and I source much of my inspiration to pursue a career in the dental/orthodontic field from him.”*

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**ProOrtho:**  
**Tell us about your practice environment.**

**Dr. Straffon:**

At the core of my practice is my team. I feel very fortunate to have developed and be surrounded by an absolutely incredible

team. I’ve said it once, and I’ll say it again, I’m only as good as those around me. When treating a patient, my staff and I work as one. Each of our orthodontic assistants are highly skilled, well-trained and have been certified in their field, ensuring that our patients receive the best possible care.

**ProOrtho:**

**What makes your practice unique?**

**Dr. Straffon:**

One thing that makes Straffon Orthodontics unique is that we take time to understand each patient’s smile wish list before designing their custom treatment. From the incredibly advanced digital technology we use to the thoughtful, aesthetic design with which we develop a patient’s treatment plan, the level of customization in our office is significant.

Every new patient who walks into my office has the opportunity to sit down with me face-to-face. I like to hear specifics about why they’re seeking treatment, what their smile goals are and what concerns they may have. Similarly, I prefer to continue these conversations throughout treatment as a way to build the doctor-patient relationship and establish trust.

**ProOrtho:**

**What orthodontic appliances/solutions do you use?**

**Dr. Straffon:**

We run a very technologically advanced practice. Digital orthodontics is surely



on the upswing and we're proud to be embracing it. Incorporating advanced tools into our practice such as Ormco's Insignia™ Advanced Smile Design™ enables me to present each patient with their before, and after shots using a Movie feature. Insignia is our GPS system. This digital planning software helps us visualize how to get from Point A to Point B without any unwanted distractions or wrong turns.

Another tool we've adopted is digital scanning. The Lythos™ Digital Impression System has made the need for PVS impressions obsolete and is truly groundbreaking for the profession as a whole. Additionally, Lythos is specifically designed to integrate easily into any practice and I love that these digital tools work together for a seamless workflow. Patients benefit from the digital capabilities of Lythos, too. They are no



longer subjected to the gooeey, messy and uncomfortable aspects of PVS impressions.

Also, we now offer a revolutionary way to tailor patients' payment plans to their budgets with OrthoFi. With OrthoFi, a patient never has to choose between the very best treatment and affordability. This flexible payment plan offers completely customized financing.

**ProOrtho:**

**What are three tips you would give a colleague or someone starting out in the field?**

**Dr. Straffon:**

1. Spend time creating your team and believe in them: Select employees whose goals and objectives align with yours, and work to inspire confidence and trust in them. It will make your practice better.
2. Understand what you're trying to accomplish and what your end goal will look like: Before you execute any plan of attack, consult the drawing board. Know where you're going and how you're going to get there before you begin a specific project.
3. For great results, always focus on the smile design and treatment plan: Orthodontics is an art. Don't ever forget that! At the heart of any great smile is a well-crafted, thought out treatment plan.

**ProOrtho:**

**What's your favorite thing about being an orthodontist?**

**Dr. Straffon:**

I strongly believe that being an orthodontist is a privilege; it's one of the main reasons why I wake up every day. I feel very fortunate to be able to offer people something that can make a difference in their daily lives—something that will impact their confidence on that first date, that important job interview or any other significant life event. This has to be my favorite part about being an orthodontist.

**ProOrtho:**

**Outside of the office, what are your passions?**

**Dr. Straffon:**

Family is huge for me. I'm a happy guy when we are all sitting around the table enjoying a casual spaghetti dinner or taking a Saturday afternoon hike together. Also, anything outside, like mountain biking, skiing and triathlons. I do live in Colorado after all!

**ProOrtho:**

**If you weren't an orthodontist, what would you be?**

**Dr. Straffon:**

Good question! I would probably be an architect. At the base of each vocation—orthodontist and architect—is a detailed design process. I guess that's why both appeal to me.

*Learn more about Dr. Straffon and his practice at <http://www.straffonorthodontics.com/>.*

**5 Things  
DR. STRAFFON  
Can't Live Without:**

1. My family: my wife Stacie and our two beautiful daughters, Savannah and Tye.
2. Biking with Stacie and friends in the mountains, and skiing with my girls in the winter.
3. My extended network of professional colleagues and friends.
4. My amazing Straffon Orthodontics team.
5. Lythos Digital Impression System: digital scanning eliminates the need for PVS impressions.



Today more than ever, there is so much more to being an orthodontic professional than the mechanics of moving teeth.

Study Group

*for*

Residents &  
Recent Grads

The reality is, there is simply no flexibility within the orthodontic curriculum for any additional subjects.

As a result, new orthodontists often begin their professional career with a series of unfortunate missteps that can leave them feeling dejected and embarrassed. Plus as many have discovered, learning things the hard way can be more than hard...it can be expensive.

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[Young-Docs.com](http://Young-Docs.com)

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# LET'S SIMPLIFY MARKETING

## *So You Don't Spend More Than You Have To*

By Adam Mead



Generally speaking I'm not the sharpest knife in the kitchen or the brightest bulb in the chandelier. So when I have difficulty understanding something complex, I need to simplify the subject matter to about a first grade level. It's the only way I can wrap my dinosaur brain around it. A prime example of this is marketing. It's big, vast, and hard to decide where money is best spent. I believe, however, that if it is broken down into bite-sized pieces anyone can get it well enough to make smart decisions. Too often

marketing falls victim to professionals in my industry who over-complicate it with esoteric jargon to intimidate you and me into thinking we need their sentinel of knowledge to navigate tumultuous business currents or whatever other cheap cliché they use. You and I know better.

Recently I was invited to teach an orthodontic residency at a great university about marketing. I was thrilled but rather intimidated because of how broad subject is. It would be like you teaching a class about teeth. So I prepared exactly the same way any other expert in my field does. I Googled my topic to see what I could steal from someone else. I was shocked by what I found.

Have you ever done an image search for the keywords "marketing strategy diagram"? If not, give it a shot. I wanted to have a simple graphic to explain a basic marketing strategy to the residents, but Google gave me everything but that. I thought PowerPoint threw up on my screen. There were boxes galore, every color of the rainbow, arrows, gradients, buzz words, starbursts and certified know-how everywhere. Every diagram I pulled up confused me. In fact, there was a graphic illustrating the 6 spheres of the social media acquisition funnel. To this day I still have no

idea what they were talking about.

It doesn't have to be this complicated. I mean, I'm in the industry and I do all this stuff nearly every day of my life. If I can't understand it, how could someone outside my industry stand a chance of understanding it well enough to spend money wisely? I decided to sort this out on my own. I needed to simplify marketing because all I was getting back from Google was a bunch of poppycock.

There are few feelings worse than sinking a ton of money into an idea that fails only to throw ideas on the wall to see what sticks next. Simplifying marketing will give you focus that will strengthen your ideas and make your marketing efforts far more strategic and effective. So to help you do that, I've broken the great big world of marketing down into three simple priorities for the purpose of investing in your practice.

### **1. CLARITY**

Most everything we do in life requires some amount of planning. Whether it's outlining a treatment plan, taking a vacation or even grocery shopping, action requires some amount of planning. It's amazing how this can be overlooked in business. Clarifying your strategy is key in eliminating wasteful spending. Know who you are, what you represent, how you're different and how you're going to find more patients than you have right now. Clarity is a mashup of brand, marketing and financial strategy. It's a global perspective of how you will grow.

Clarity requires an investment of either time or money but knowing where you are headed will pay dividends in the future. You will eliminate wasteful time and sub-par ideas right from the start. Everyone is different, but I feel this is perhaps the most important part of marketing and the first place to invest in your practice's future.





As a friend once told me, “if you don’t know where you’re going, any road will take you there.”

## 2. BRAND INFRASTRUCTURE

Consider your practice’s infrastructure – chairs, sinks, floors, lights etc. All these items come together to create an environmental experience that ideally tells the story of your practice. If you are like most orthodontists, you probably built your practice’s infrastructure all at once and it’s amortized over several years as a long-term investment. Just because you had a brand-new space didn’t mean people were necessarily going to come flying through the doors. However, as word spread of how wicked cool you and your office are it started to catch on because humans are inherently curious and we all know what happened to the curious cat.

Brand infrastructure can be viewed through a similar business lens. Items that tell the world about you and your practice aren’t necessarily responsible for driving traffic through the doors because there is no call to action. It’s there to support, just like your infrastructure. Your practice name, logo, tagline, website, culture, interior design, practice video, t-shirts and other giveaways are just a few examples of brand infrastructure. You can have the coolest logo (and you should), but don’t expect that investment to blow the doors off quite yet. It takes time for people to see it, become curious about it and ultimately look into it. The simple act of appearing very different from your competitors and the rest of your industry can certainly drive traffic. But it’s not a push-of-a-button type of thing. The most aggressive growth I’ve seen as a result of new brand infrastructure was a 400% increase in inquiries within one quarter after the launch. Another client experienced a 20-30% increase in revenue within 24 months as a result of strategically built brand infrastructure. A start-up practice quadrupled its first year revenue projections with it.

So you get the idea. Well-aligned clarity and brand infrastructure can make a huge difference. However, I want to be clear. Don’t bank on it driving traffic. While it will for some, it may not for others. Certain markets just seem to be primed for it. Be prepared to accept the fact that it’s a long-term investment. You need other action-oriented marketing efforts if you’re going to catch people’s attention – especially if you’re in a competitive market. But brand infrastructure is your second priority. And only create

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*Your practice name, logo, tagline, website, culture, interior design, practice video, t-shirts and other giveaways are just a few examples of brand infrastructure. You can have the coolest logo (and you should), but don’t expect that investment to blow the doors off quite yet.*

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what you absolutely need right now. There’s no law that I’m aware of that says you can’t continue to add more infrastructure over time. Be smart with your money.

## 3. BRAND GROWTH

When most people think of marketing, they tend to think of giveaways like logo’d water bottles and pretty much everything in a category I’m calling “brand growth.” Brand growth is like tickets to the state fair. It’s not cheap but if you pick out the

right attractions while you’re there, you’ll get a lot out of it. Brand growth is all about ROI. It’s calculated and you have to pick the right tactics in order to get more out of what you put in.

Things like newspaper, magazine, radio, and website banner ads, or search engine marketing (SEM) and search engine optimization (SEO) are all tactics you invest a certain amount of money into knowing you should see a calculated return based off of average conversion rates.

If you pay to ride the roller coaster at the state fair you’ll have a good time. But if you spend a little more on the roller coaster at Six Flags you’ll be thrilled. Contrary to common belief, the amount of money you spend on saturating the market with your message, or in other words your media spend, is only part of the equation. I would argue that it is less important than the quality of what you’re putting out there. I hear so many people say, “I’ve tried that. It doesn’t work.” When I look at how they tried it, it’s clear why it didn’t work. You’re not just breaking through the clutter of your competition. You’re breaking through the clutter of every other company advertising at the same time as you. And did I mention the clutter of preoccupied minds thinking about all they have to accomplish today? Your message must be engaging enough and expressed in such a unique way that it breaks through all that “sentinel knowledge” floating around in the business currents. Pay just a little more for the great roller coaster and you’ll get much more out of it.

Remember, nobody invites guests over to their house if it’s a wreck so apply the same courtesy to brand growth. If you have no brand clarity and your brand infrastructure looks like a pig pin, visitors are likely to never return. You will continue to waste time and money on bad brand growth ideas with no solid foundation to support it. Be strategic and let common sense be your guide. At least, that’s what I try to do.





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# 15 KEY POINTS TO IMPROVE YOUR NEW CASE ACCEPTANCE

By Charlene White



Many orthodontists are allowing hundreds of thousands of potential production walk out the door of their practice every year. The reason is they simply have not learned and implemented excellent sales techniques. Another huge factor is they have been unwilling to change their internal systems to continue to grow.

We are now at a time where orthodontists who are unwilling to change are quickly losing market share. The proof is in the statistics. What is your exam to start ratio? The national average is 55% and tracking downward. If your case acceptance is not 65% or higher you

are losing casing that could have been starts in your practice.

The following are the number one mistakes I see orthodontists make regarding the potential growth of their practice:

1. They spend \$40,000+ on a consultant who has no consistent track record in coaching teams on how to get excellent case acceptance.
2. They have ignored how the demographics of their area have impacted their new patient flow.

3. They refuse to be realistic about their fees and payment terms in order to make their fees affordable to 75% of their new patients.

4. They are unwilling to temporarily take less in collections as they build their accounts receivables.

5. They have not invested in having a credible consultant evaluate their new patient process from start to finish.

6. They have not developed their own sales skills or had their treatment coordinator(s) evaluated for their performance once the doctor leaves the consultation room.

I have had several clients make a treatment coordinator change or had their treatment coordinator properly trained and immediately increase 10-20%.

FOR EXAMPLE:

- 400 new patients
- 100 on to recall (25%)
- 8 referred out
- 10 not a candidate for treatment

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282 "potential" starts at \$4,500 average fee per start.

TITLE WILL GO HERE		
(NET PRODUCTION / # OF STARTS)		
100% START	282 X \$4,500	\$1,269,000 IN PRODUCTION
80% START	225 X \$4,500	\$1,012,500 IN PRODUCTION
70% START	197 X \$4,500	\$886,500 IN PRODUCTION
60% START	169 X \$4,500	\$760,500 IN PRODUCTION
50% START	141 X \$4,500	\$634,500 IN PRODUCTION
40% START	112 X \$4,500	\$504,000 IN PRODUCTION
30% START	85 X \$4,500	\$382,500 IN PRODUCTION

The following are 15 key points to improve your new patient case acceptance. I encourage you and your team to analyze each area closely. Take action steps immediately to move more of your patients to "yes."

**I would like for you to rate your practice in all of these areas on a scale of 1 - 10 with 10 being excellent.**

YOUR RATING 1 - 10	#	KEY POINT	ACTION STEP
	<b>1</b>	Our new patient telephone experience is excellent. We get compliments on our admin team.	Have secret shopper calls done periodically to evaluate the performance of the staff who answers the phone.
	<b>2</b>	1st "Test of Trust." We see the new patient on time.	Evaluate your patient flow reports weekly to check your on time log.
	<b>3</b>	Insurance benefits are confirmed prior to the 1st appointment.	Assess your scripting for asking this information on the 1st call.
	<b>4</b>	The new patient consultation room has been updated in the past 3 years. We get compliments on our décor.	Outdated décor is unacceptable by today's standards. Hire a designer to evaluate your office and present a plan for an update.
	<b>5</b>	Offer cutting edge clinical techniques: scanner, laser, Invisalign, clear brackets, etc. Moms are researching on the internet	For higher case acceptance do not charge extra for clear brackets or Invisalign.
	<b>6</b>	Take complimentary diagnostic records at 1st appointment prior to the doctor exam.	Install a large monitor in the consultation room for the "Wow" factor.
	<b>7</b>	Track exam, recall, and Phase II case acceptance monthly. 20% or less should go into a pending status.	The TC should report her performance record daily, weekly, and monthly.
	<b>8</b>	The doctor and TC are both fully trained in how to move the patient to "start." 75% of the time versus 50% of the time.	Hire a consultant who is an expert in this area to evaluate and coach you.
	<b>9</b>	We have a system for getting internet reviews which raises our SEO. Moms are on the internet 2-3 hours a day. 85% of the decisions to start treatment are made by mom.	Work with an expert in internet marketing. In today's market this is essential.
	<b>10</b>	We receive compliments weekly on our doctor(s) and treatment coordinator(s).	Tape several of your exams start to finish and have your performance evaluated by an expert in ortho case acceptance.
	<b>11</b>	We offer very flexible financing. We understand lower down payments help families afford treatment. Many cannot afford 20-30% down or over \$200 per month.	Assess the list of patients who did not start. What terms did you offer them?
	<b>12</b>	We understand the importance and methods of building rapport and a connection with the patient and parents.	List the ways you connect with your patients.
	<b>13</b>	Our "will call back" system is followed routinely by the treatment coordinator. 3-6 contacts is ideal.	Review your system and establish an accountability system.
	<b>14</b>	Study your competition.	Evaluate what you are up against and make changes as needed.
	<b>15</b>	Assess your demographics. This is essential to healthy new patient numbers.	Do not underestimate the power of demographics. Hire a demographics specialist to assess your location(s).

**RATING CHART** 150 - 135 = EXCELLENT 134 - 120 = GOOD 119 - 100 = AVERAGE LESS THAN 99 = NEEDS IMPROVEMENT



# ADDRESSING FINANCIAL GRAVITY

## *Bringing Simplicity to the Financial Complexities of an Orthodontist*

By Garrett B. Gunderson, with Brett Sellers, CPA

Gravity is no respecter of persons. It doesn't matter how nice of a guy or gal you are, if you jump off a cliff, there are harsh consequences simply due to the principle of gravity. As an efficiency expert to orthodontists, I constantly encounter docs that are not efficiently dealing with the financial gravity that comes with being a business owner. Just like gravity, it doesn't matter if you are a good person, have the right intentions, or are working hard, if you do not deal certain financial aspects, you will lose money.

When you raise your hand and opt in to becoming a business owner there are certain rules that apply just as sure as gravity exists. These are more complicated rules of finance and business that if not understood and addressed cost millions of dollars over ones lifetime. At the same time, these are some of the greatest advantages to entrepreneurs when these items are properly understood and addressed.

Some of the things that take a higher degree of knowledge and attention include tax strategy, acquiring loans and negotiating the best interest rates, acquiring proper insurance coverages (the types only bought or used by a business owner), employee benefits, and many others. Most of the time rather than being more efficient or effective in these

areas, the doctor merely tries to work their way through this by adding more space, hiring more people, selling more procedures, working more hours, etc etc. Rather than address the gravity, docs often times use hard work to temporarily help, or they increase marketing and/or reduce expenses, or they might eliminate

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*When you raise your hand and opt in to becoming a business owner there are certain rules that apply just as sure as gravity exists.*

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staff or ask some to just do more by working them harder, but all of this is a limiting view that leads to frustration and eventually can be very destructive.

There is a better way to address this issue and keep more of your money without wearing yourself out by working harder.

Use the following guidelines to

determine whether or not you are addressing the financial gravity that weighs on you as a business owner. Once again, it doesn't matter if you are a nice person or not, the numbers just don't care. It matters if you have an awareness and address the "gravity" of the situation to keep more of your hard earned money.

1. Do you analyze the expense structures and uncover hidden financial fees and commissions in all your existing financial products?
  - a. Fees on your retirement plans
    - i. 12b-1 Fees
    - ii. Expense Ratios
    - iii. Administration Fees
    - iv. Advisor Management Fees
2. Do you have any investments that are not outperforming the cost of some or all of your loans?
  - a. Consider paying off the guaranteed cost vs. earning the non-guaranteed interest.
  - b. For money that stays invested, do you have strategies for limiting your





exposure to market risk while also giving you as much upside potential as possible?

3. Do you analyze your accounting strategy and every aspect of your taxes to ensure you're keeping as much of your money as possible?
  - a. Have you considered cost segregation if you own your building?
  - b. Do you separate out your activities from a salary vs. dividend perspective?
  - c. Do you have the type of corporation that best fits minimizing your taxes?
  - d. Do you talk with a tax strategist throughout the year versus just during tax season?
  - e. Does he teach you to defer your taxes until later when your tax burden will be higher, or do your tax strategies

limit or eliminate your taxes when you withdraw on the back end?

4. Do you have a current strategy to provide you with practical exit strategies on all your investments, or will you be subject to unexpected penalties, fees, and taxes?
  - a. Do you know of ways to prepare your business now if you were to sell it in the future to:
    - i. Limit taxes
    - ii. Maximize your multiple (how many times earnings you sell for)
5. Have you reviewed all your insurance coverages to check for duplicate coverage and ensure the most efficient structure and best possible premiums while transferring as much risk as possible?
  - a. Do you have a Business Owner Policy for liability protection?
  - b. Do you have an umbrella policy to protect from liability anytime you are not acting as a doctor?

- i. Does your umbrella policy include uninsured/underinsured coverage?
  - c. Have you looked into Health Savings Accounts?
  - d. Have you increased your deductibles to lower your premiums?
  - e. Have you increased your elimination periods to lower your premiums on your disability policies?
6. Do you know how to present yourself to a bank in order to ensure you're getting the best terms and rates, maximize deductibility and to provide the best debt payoff strategy?
7. Do you have a credit score above 780?
- a. Have you renegotiated your loans in the last year?
    - i. Mortgage
    - ii. Credit Cards
    - iii. Business Lines of Credit

These are just a few of the areas where we find docs leaking money. In the areas of credit score, debt structure, and cash flow optimization (increasing cash flow from efficiency, not reduction or production) there is an average of 2,484 dollars a month that we find.

In the areas of tax, 9 out of 10 times the doctor is overpaying. The average is 11,700 dollars per 500,000 of revenue. These are the areas a business owner never gets the convenience of opting out. It is just the gravity of being a business owner. Like it or not, it just exists. You either address it head on, or you lose money, it is that simple.

Some of the unfortunate excuses are:

- 1- I don't handle that, my spouse does
- 2- I don't have the time
- 3- I am no good at money

There are many learned skills through school and practice. This is one that can be learned and there are millions of

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*In the areas of tax, 9 out of 10 times the doctor is overpaying. The average is 11,700 dollars per 500,000 of revenue. These are the areas a business owner never gets the convenience of opting out. It is just the gravity of being a business owner. Like it or not, it just exists.*

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dollars at stake. This is one of the things you signed up for when you choose to own your business. You may not have known you were signing up for it, but by not addressing it, you leave money to the government, financial institutions and waste that is rightfully yours. You just have to be aware of the situation first. Second, realize financial planners are not equipped to solve this issue.

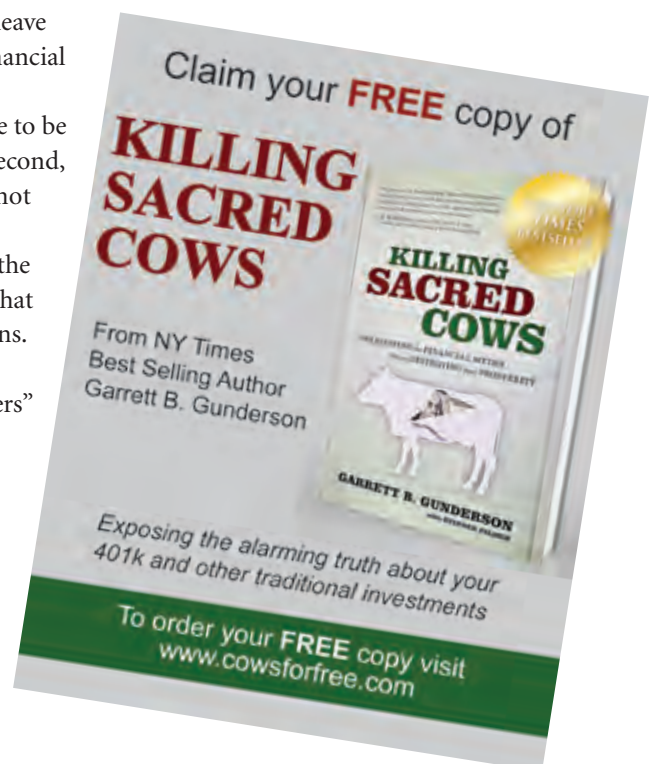
One of the critical flaws of the financial services industry is that it's driven by sales commissions. Working with salespeople posturing as "financial planners" causes you to lose money in taxes, hidden financial fees, insurance premiums, and mismanaged credit. It means you're not optimizing your current cash flow, nor are you adequately preparing for the future.

Next, you have to get

organized at a level that this information is something you are aware of and can look over. Next, you intentionally ask and look for ways to be more efficient with your dollars in the areas mentioned above. For the best results it is critical to assemble a team or join a firm that has already fully aligned a team to provide these services.

So, the next time you go to fund your retirement, miss out on a trip because you are trying to save more money, delay on hiring a critical person to your office until you're in a better financial position, or find yourself overworked, remember to find ways to keep more of what you make. Create more choices rather than resorting to exhausting yourself, trying to do this all alone, or limiting your enjoyment in life in the name of sacrifice for a better future.

*Garrett B. Gunderson is the foremost authority on finding leaking money for orthodontists. You can claim a FREE hardcover copy of his NY Times Bestseller at [www.cowsforfree.com](http://www.cowsforfree.com).*





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Dr. Heather Brown of Houston, TX and some of her S4L scholars!

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- Dr. Heather Brown -

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# WHAT'S NEXT?

By Angela Weber

The year 2015 is on its way, and it promises to be another year of challenging but exciting developments in marketing, both for orthodontic practices and business in general. A look at recent history shows us how quickly things are changing. Review sites are becoming as important as the advice of trusted friends, and the social media landscape keeps evolving with new platforms rising to prominence and more established sites like Facebook and YouTube looking for ways to maintain their edge.

But what's next for marketing isn't all about the hottest thing igniting the Internet. The specifics of new apps and services, after all, are just a reflection of changing customer attitudes and cultural mores. For an orthodontic practice leader to stay on top of the game, it's necessary to get a handle on larger trends shaping the marketplace. The following ideas are what I see on the horizon, and I spoke with Ken Segall, best known for his pioneering ad work for Apple; Bill Stinneford, a VP at market research and

consulting firm Buxton; and John Jantsch, writer of *Duct Tape Marketing*, to get their perspectives on what's next.

## CUSTOMER SATISFACTION IS #1

Your patients expect more than ever before. They want good results, good service, and a good overall experience. Aim to please, and you will be one step ahead of others. If patients aren't satisfied, on the other hand, aggressive competitors will see their ambivalence as the opening they need to elbow into your domain.

In your effort to please patients, keep in mind how hyper-connected and opinionated people have become. An amazing 75% of millennials report that they won't go an hour a day without checking their phones, according to Trendwatcher.com. A recent Forbes article notes that 34% of consumers have used social media to share their feelings about a company. Put this together, and you realize it only takes a moment for a satisfied or dissatisfied patient to spread their opinions about your practice to a large audience.

And this development also underscores consumers' emphasis on the now. We're living in a world where Amazon is testing same-hour drone deliveries, and high school students are just as busy as their parents. How long are you keeping them waiting in your office?

#### TARGETS ARE NARROWING

The phrase "target market" has been around for a while, but the bull's-eye in that target is growing ever smaller. It's no longer enough to think about general demographics. If you want to grow your patient base, look at your best patients in detail. What schools are they going to? What cars do they drive? What neighborhoods do they live in?

"In digital marketing, the big word will be relevance," Ken Segall, who is best known for his pioneering ad work for Apple, tells me. "Audience measurement tools and the science of targeting likely customers are becoming incredibly sophisticated. So in marketing, there will be more talking to people who care and less annoying people who don't. This is better for marketers and better for consumers."

And targets sometimes can shift. Bill Stinneford, a VP at Buxton, a market research and consulting firm, has a unique perspective based on same thinking of a retailer. "What are the attributes of your best customers, and where are more potential patients located?" he asks. "Your

building itself can be your best marketing vehicle. Some locations no longer have the right kind of customer in the area to be successful, and so dumping more money into marketing isn't going to help. Relocation can sometimes be the answer."

#### DIVE INTO BIG DATA

Buxton also believes that trends around big data will also become increasingly important to orthodontic practices. "The Big Brother data you hear about is real," he says. "From a personal standpoint

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*Audience measurement tools and the science of targeting likely customers are becoming incredibly sophisticated.*

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it's scary, but from the business side it's very exciting. There is a paper trail to everything we do. It's available, and you will need to take advantage of it. Businesses that take the time to understand their customers and utilize the big data will win."

From a marketing perspective, you might already have a lot of data available to you. If you have a decent Facebook presence, the site will allow you to drill down into preferences and lifestyle of your fans.

#### GETTING PERSONAL

Consumers of 2015 desire authenticity, and orthodontists should let their unique selves come through in their patient interactions and their marketing.

"I believe that personal experience in the face of technology will continue to be the differentiator," John Jantsch, writer of *Duct Tape Marketing*, tells me. "We must equip our clients and networks with

the technology that makes their buying experience convenient and frictionless, but we must never forget that we are selling to one unique individual at a time."

#### MASTER MORE THAN ONE APPROACH

For a long time, an orthodontist could sustain a thriving practice on little more than referrals from dentists and other professionals. Those days are long gone, as are the days of any single-pronged approach to marketing. Because your customers in 2015 are much smarter and connected than ever before, you need to be smarter in how you market to them. Multiple tools and multiple approaches are what's needed. So what does that mean in practice? Referrals should still be part of the mix, but a dynamic website that functions properly on all devices should be too. Look into how your patients operate in the world and interact with one another. As much as possible, you need to be where they are.

In conclusion, imagination is better than imitation. This bird's-eye view of what's next isn't meant to be prescriptive. It's to get you thinking of the bigger picture of changes going on in our society. It's time to reimagine your future. Picture your practice in a better place, and prepare yourself to take more risks. In 2015, look to implement better ideas and spend the money to execute them properly. A strong commitment is virtually guaranteed to lead to success. I've seen what I've perceived to be truly bad ideas yield tremendous results for clients because the clients believed in their ideas wholeheartedly. When we believe in something, we do what it takes to see it succeed. Fantastic success cannot be achieved with imitation. Only your imagination will get you there.

*Ken Segall and John Jantsch, both interviewed for this article, will be presenting at the company's What's Next Synetics Summit in Miami in March 2015. For more information, visit <http://orthosynetics.com>.*



Meet

# DR. PATRICK ASSIOUN

From an early age, Dr. Patrick Assioun came to understand the nature of change and the necessity of adapting to an ever-changing world in a very personal way. At age 9 his family left Lebanon as war erupted and young Patrick found himself in the South of France in Cannes. Enrolled by his parents in a nationally accredited Sports Academy for gifted students, Patrick received lessons in the pursuit of excellence and the hard work necessary for such an endeavor. The daily regimen at the Academy included academics in the morning and tennis in the afternoon. Many times the afternoon session included instruction from the country's top professionals or visiting stars playing in tournaments. Competition was engrained in him from a young age. Patrick's ability, aptitude and hard work were forged in the fires of incessant instruction and high expectations to create a great tennis player with a passion for the game as well as an awesome human being with a passion for life!

Patrick was a rising star on the courts of France, even receiving a national ranking, when things changed yet again and his family moved to Montreal. In Canada, Patrick continued to excel in tennis, obtaining a Canadian ranking











devoting much of his time to coaching teenagers to play the game he loved. His dream of becoming a professional tennis player was still a very real possibility based on his performance, but Patrick's pragmatic side began to calculate the odds.

Young Patrick the tennis star began to realize that he should focus his ambition in another direction, one that would enable him to make a great living with more predictability. He set aside his dream of playing professional sports to attend law school. During his time at the University of Montreal School of Law, Patrick was an orthodontic patient and he recognized the possibilities.

"I enjoyed going to the orthodontist. The doctors and staff seemed to be having fun the whole day, goofing around with the younger patients, and I loved that,"

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*"I enjoyed going to the orthodontist. The doctors and staff seemed to be having fun the whole day, goofing around with the younger patients, and I loved that," recalls Assioun.*

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recalls Assioun.

After speaking with his orthodontist about the profession, Patrick decided to enroll in dental school at the University of Pennsylvania. During his time in dental school, he even found time to further pursue his interest in law, and also obtained a Masters in Law degree with a concentration in medical malpractice. Now knowing exactly what he wanted, Patrick went directly from dental school to Harvard School of Dental Medicine to earn a degree in Orthodontics and Dentofacial Orthopedics and a Master of Medical Sciences degree in Oral Biology from the Faculty of Medicine at Harvard. Patrick noted that his parents played a vital role in his work ethic and education. "Without my parents support, both emotionally and financially, I certainly would not be where I am today.





My mom, who stayed with me a good portion of the years during my dental and residency training, enabled me to excel in my dental and orthodontic studies and helped me stay focused and motivated throughout the years.”

After graduation, Assioun worked part time for a general dental practice as well as two orthodontic practices but soon realized he needed the freedom to innovate.

“I realized I was always looking for the next thing around the corner”, he recalls and in 2002 he opened his first practice from scratch with one location, followed by a second location, and then a third. By 2009 Dr. Assioun had six successful practices and saw patients personally at two locations.

Like many orthodontists who own multiple practices, Dr. Assioun realized that the locations he worked consistently in delivered a better customer experience than the ones he owned and oversaw. While working through others, Patrick

### REVIEW OF DR. ASSIOUN’S HONORS & AWARDS

Dr. Assioun has received many honors and scholarships, and has been published in the *Journal of the American Student Dental Association*. He is also a researcher in the field of orthodontics.

In 2001, he was the recipient of the Harvard Clinical Proficiency Award of Excellence for Orthodontics, a prestigious award granted by the Harvard Society of Advancement in Orthodontics.

Dr. Assioun is a member of the Massachusetts Dental Society, Massachusetts Association of Orthodontists, American Association of Orthodontists, and the American Dental Association.

wanted to experiment whether granting equity to associates would quickly translate into additional production and a sense of leadership in the offices. Specifically, he was looking to see whether a buy-in model would alleviate his daily management responsibilities while still maximizing the revenue potential in each office.

Although Assioun acknowledges that associate ownership can be successful in certain cases, he has opted to move away from this model and states “I’ve found other ways to motivate and monitor associate doctors, but I’m no longer offering buy-in options.”

Always the innovator and unflinching in the face of change, Dr. Assioun was ahead of the curve in adapting to the newest model for delivery of care and thus created his own Multi-Specialty Practices to serve patients.

He admits, “I like things that make sense. Patients can be treated for all their needs, throughout their busy lives,



by having multiple specialists all located at one location. Our patients have been extremely receptive to this concept,” he says, “because it helps simplify their lives.”

Dr. Assioun is still a busy professional, in fact, when asked for words to describe himself he offered, “I’m able to see opportunity in uncertainty. I seek

challenges, I’m ambitious and confident! I’m spontaneous, not a planner—which is one of my weaknesses. But, it may also be an advantage,” he says with a laugh. “And, I’m also a bit ADD. And, I surround myself with an amazing team and staff. Without them I could not have been this successful and for that, I am truly grateful.”

So, what does Dr. Assioun do outside of work? He has a passion for travel and recently visited Italy where the food, the wine, the people, and the architecture inspired him.

“It’s important for us to travel to other countries so that we can share their culture.”





It's not surprising that his favorite movie is, *Life Is Beautiful*, which he described as "inspirational, beautiful to watch and beautiful in spirit". He also enjoys all types of cuisines, including Indian, Japanese and pizza. But, his favorite food will always be his mom's cooking. Patrick also enjoys watching his favorite TV shows—*Prison Break*, *Revenge*, and *House of Cards*. "They keep you in suspense," he says with a laugh.

When asked what path his life would have taken had he not become an orthodontist, Dr. Assioun was pensive.

"Since I went to law school before dental school, I do believe I would have practiced law. I always wanted to become an immigration attorney because I understood what it was like to desire to come to the United States, and how cumbersome and difficult the process could be. Or I would have become a medical malpractice attorney for the plaintiff... and I just might pursue this after my orthodontic career has ended."

We can all hope this doesn't happen because no orthodontist would want such a man breathing down our necks from the other side of the courtroom!

Dr. Assioun enjoys his freedom and flexibility at work and in his personal life. "Although I have had many wonderful relationships throughout my life, I admit that I have a weakness when it comes to making a commitment. But, I think I'm now in a place where I can picture my life with a family and children in the near future... maybe!"

Things tend to come full circle and Patrick has recently reconnected with his first love, "I just started playing tennis again." And despite a few aches and pains his pride is obvious when he speaks of his true passion, "I played in my first tournament last year and did well! My dream is to retire to the South of France to play tennis and to watch the professionals. Although I think I'll always spend at least half my time in Boston, the city that has become my home over the past fifteen years".

When asked about any regrets, Dr. Assioun admitted, "I sometimes feel that I am a failure because I didn't follow my dream of becoming a tennis pro." But these regrets appear to be short lived as he admitted. "I'm very happy with my life; in fact I'm working on a new acquisition right now that I'm really excited about." There is no telling what new innovations Dr. Assioun will bring to the profession but they are certain to push the envelope and adapt to our ever changing world.

When asked what advice he would give residents and young orthodontists, Dr. Assioun was succinct and direct as usual. "Try to start the day with the end in mind. What I mean by that is - set your goals early and do whatever it takes to get into orthodontics."

Wise words from a wise man who has made his way in this world through sheer determination, a willingness to change and an unparalleled work ethic.

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# THE *Parent* TRAP

By Terri Rice and a ProOrtho Doc

## FROM A MOM'S PERSPECTIVE:

I am the proud mother of two teenage boys. My oldest, strong-willed child made it through the entire orthodontic process pretty unscathed. Of course, at the time, there was some small battles -- wear your rubber bands, stop eating the “no-no” foods, and floss your teeth this month! Now, my fourteen year old is going through the process; along with his mother I might add, so I may be a little more sympathetic this go around. However, we still have the same conversations. Where are your rubber bands? That gummy worm is going to stick in your expander and why are your teeth the color of corn?

I must admit, with all of the other daily battles that we as parents face, being a nag about these little issues, sometimes seems like a waste

of time. I choose to pick my battles and more often than not, my child's oral hygiene is not at the top of my list. Don't get me wrong, I absolutely 100% know the importance, but some days when I am dealing with speeding tickets, failed tests, or worse, braces are just not on my radar.

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*Doctor, you never know what that family is going through or may have just gone through. Parents are dealing with enough drama that they don't need one more person questioning their parenting skills.*

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I recently sat down with a friend of mine whose teenager is also in braces. She knows that I am in the “biz”, so she opened up to me about her story and asked for my advice. Her experience is

not unlike a lot of other moms.

At her child's recent ortho appointment, the doctor spoke to her about her child not wearing his retainer. Rather than speaking directly to her son, the doctor chose to direct his lecture to her. “Why is he not wearing his retainer? We've talked about this before. Well, he's going to need a new one.” Then apparently he gave the big “eye roll” and walked away. What the doctor did not know was that this mom had been dealing with constant daily battles with her son. Multiple traffic violations, suspension from school for drug use, and altercations between her son and husband at home, were just a few of things she was living with. She confided to me that she already felt like a loser and failure when she walked into that office and when she left, the doctor had just confirmed her feelings. Of course, I let her know that was absolutely not true and that this doctor was WAY out of line. And, I knew I wanted to share this story in hopes that other doctors – no matter what area of medicine you practice can learn from this.

Doctor, you never know what that family is going through or may have just gone through. Parents are dealing with enough drama that they don't need one more person questioning their parenting skills. They do that enough to themselves!

**A MOM’S ADVICE FOR DOCTORS AND STAFF:**

**1) Aim your directives at the patient – not the parent.**

Most ortho patients are old enough to take on the responsibility for their own oral hygiene. So, tell it to the KID!

Dr. Burris advises, “I do my best to get mom on my side and make it clear I’m there to help. I always say, “Mom I know you remind Johnny all the time about brushing... Johnny you need to listen to your mom! In this way I’m neither attacking mom nor the child simply stating the problem and acknowledging that mom is doing her best.”

**2) DO NOT give parents parental advice!**

We know what we are doing wrong and the last thing we need is our doctor or his/her staff telling us how to discipline our children. Do not tell parents to ground their kids or make them pay for treatment by working it off. We know what needs to be done.

Dr. Burris again suggests that doctors talk directly to the child in terms of what they are doing or not doing and reinforcing that we KNOW that mom is doing all she can to get the child to comply. Whether you believe this or not, it is a solid tactic to get mom on your side and the most likely way to get the compliance you need.

**3) If it is obvious that mom is having a bad day or you realize that you have overreacted and that no positive solution is forthcoming, then diffuse the situation.**

Sit down to be below mom’s eye level, speak softly, recognize that things have gotten off track, suggest that a set of records be taken and that everyone sit down at a time and place where you can speak calmly and have plenty of time.

**4) Ask the parent what you can do to make them happy and then listen.**

Many times the solution is easier than

you thought. Sometimes the proposed solution is ridiculous; sometimes the parent is at a loss for a solution. Whatever the outcome, this tactic will give you insight into the problem and time to think while letting the parent have the floor.

5) So Docs, lighten up on the moms and take up the issues with the kids directly. It “takes an army” and most mothers would WELCOME your help in motivating their children! They will listen to you way more than they will listen to the nagging mom!

**FROM A DOCTOR’S PERSPECTIVE:**

Moms just don’t get it. We are there to help. We can’t do our job without compliance. We can’t do our job with broken brackets or poor hygiene. We will be blamed or even sued if we don’t tell mom what is going on or who is doing what. We are the doctors and we know what we are doing and mom should listen to us and be grateful! Right?

Well, sort of... It is true that we need compliance to get the job done and have a responsibility to inform the mom and protect the child but life is not a textbook and there are more parameters to account for. Part of getting compliance and results is communicating effectively. It is the sender’s responsibility to communicate effectively and that means we are responsible. Also, we have to live in the real world and in the real world people have bad days – us and the parents – and when that happens we need to try to move beyond it and keep on trucking.

Look, dealing with this kind of stuff is part of the job description for our chosen profession. Suck it up and deal with it. Come to terms with mom or don’t. Try to recognize problems before you put braces on because once they are on then it is your problem! If all else fails, take the braces

off refund the money and let everyone move on. Don’t nickel and dime people or parcel out responsibility – you let them in the practice and you didn’t convince them of why they should do what you want them to do! It’s not about being right or winning it is about resolution, your business and your reputation.

I’m as bad as anyone and probably worse

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*Moms just don’t get it. We are there to help. We can’t do our job without compliance. We can’t do our job with broken brackets or poor hygiene. We will be blamed or even sued if we don’t tell mom what is going on or who is doing what. We are the doctors and we know what we are doing and mom should listen to us and be grateful! Right?*

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when it comes to reacting negatively when a mom jumps on me as I try to help her and her child. Practice and awareness are the keys to resolving and, preferably, avoiding these confrontations. Think about what situations led to upsets in the past, figure out what went wrong and what you can do better next time and learn to recognize the situation as it develops in order to avoid a problem. We’re all in this together – us, the parents, the kids – so can’t we all just get along?





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The reality is, there is simply no flexibility within the orthodontic curriculum for any additional subjects. As a result, new orthodontists often begin their professional career with a series of unfortunate missteps that can leave them feeling dejected and embarrassed. Plus as many have discovered, learning things the hard way can be more than hard...it can be expensive.

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Dear Boss,  
I quit!



## ANOTHER "CRAPPY" *Employee Bites the Dust!*

By Wayne Pearson

Employees are people, too. Regardless how awesome, amazing, lazy, disorganized or just plain dumb you think they are, they're probably not. Your perception paints your reality as it best suits your own beliefs about the world around you. What you believe to be true or false, right or wrong, good or bad is easily reinforced by the way you've trained your mind to filter the sensory input it receives. I say all that to say this – it's important to continuously question your dispositions

because the beliefs you opt to endorse will likely "prove" true – at least to you!

So you have some lazy employees, huh? Ones who are too dumb to do anything right? Well, firstly, you hired them. (Or someone you hired, in turn, hired them. Let's not get into copouts here.) So, there must have been some quality that made them stand out above the other candidates. They must have evidenced some attribute to be deemed worthy of hire. Have you ever bought a new car

that you fell in love with on the lot, only to fall out of love with six months down the line – when you have to keep paying that bill every month, but the novelty has worn off? Or perhaps you once found an attractive new mate who seemed infallible, until they just weren't anymore? It's human nature to devalue the people and things already well within our grasp – this includes our employees; particularly ones who perform core functions that are deeply entrenched in our businesses.



So let's turn the tables for a moment. When was the last time you truly engaged with those dumb/lazy employees? Why do they get up in the morning and come to work for you? What's important to them? What are their goals in life? What do they believe are their own strengths? Weaknesses? Do they have any interest in learning more, doing more, and improving their station in life? Are they fired up and working as hard for you as they can? Or, are they just doing what they must in order to earn the paycheck? My bet is, you don't truly know the answers to these questions – at least not about the employees you think are terrible. Hmmmm...

If you don't care enough to know your employees, why should they care in return? If you don't show them respect and appreciation, why should they want to work hard? If you let your own notions of them soil the relationship you might otherwise be able to cultivate, why should they make the effort?

Earn the right to lead.

Managers are appointed, but true leaders continuously cultivate the privilege.

They talk to their teammates. They know the employees' desires, fears, perks and quirks. They use what they know about their employees to challenge them to achieve new goals, to persevere during tough times, to celebrate victories, and to tie them more intimately to the organization. Great leaders know their people, appreciate their people, do what's best for them, fight for them, and push them to be their best...to do better than they might have even believed possible.

Once you truly know your employees and have earned their respect, give them big goals. Trust that they can and will exceed all expectation. Believe it. Make them believe it. Sure...sometimes they'll fail, but that's ok. Help them get back up, analyze what went wrong, create a new plan, and try again. When they succeed,

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*If you don't care enough to know your employees, why should they care in return? If you don't show them respect and appreciation, why should they want to work hard? If you let your own notions of them soil the relationship you might otherwise be able to cultivate, why should they make the effort? Earn the right to lead.*

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shout it from the mountaintops. Make it a big, big deal. Write a handwritten "thank you" note for their efforts. Give them a small token of your appreciation – perhaps a gift that demonstrates how well you know them as people or an award, trophy, badge of honor...something that tells their peers, "I'm a great asset and valued team member!" Most importantly, give them honest and candid (there is a difference) feedback, but always delivered in a professional way that clearly conveys your sincere desire to see them succeed. So, to summarize my rant on how to motivate employees:

Improve your own perceptions. Get to know your team. Foster belief in their abilities. Always push them to grow. Help them learn from defeats. Glorify their victories.



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# YOUNG DOCS

Today more than ever, there is so much more to being an orthodontic professional than the mechanics of moving teeth. But the reality is, there is simply no flexibility within in the orthodontic curriculum for any additional subjects. As a result, new orthodontists often begin their professional career with a series of unfortunate missteps that can leave them feeling dejected and embarrassed. Plus as many have discovered, learning things the hard way can be more than hard...it can be expensive. But a new program aims to help the young doctor avoid these errors and hit the ground running.

**NEW SECTION**



# RULES OF ENGAGEMENT

## *Never Cross the Line*

By Ben Burris

This article is full of lessons that apply equally to male and female orthodontists. Cross these lines at your peril! Remember in this day and age that anything you say or do might be recorded on someone's phone AND you don't necessarily have to do anything wrong to get in trouble if what you have done makes what you're accused of seem plausible. We want to avoid even the appearance of evil!

- 1) NEVER date or have any type of relationship with your staff members whether you're an owner or an employee. Never, never, never.

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- 2) If for some reason you break the first rule then go hire an HR lawyer and pray you can get out of trouble before trouble starts.

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- 3) If you break the first rule, trouble is bound to start eventually.

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- 4) If you make a mistake, hire a HR lawyer rather than compounding your problems by trying to run off the person the doctor got involved with. Creating a hostile work environment is the definition of harassment. Literally.

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- 5) Never, never, never notice or comment on anything to do with the anatomy of any staff member, fellow doctor or patient. Nothing good will come from it. It's just plain dumb. Also know that for guys it doesn't take you looking down a patient's shirt to get you in trouble, it just takes the patient or the mom thinking you did. So be smart and have your staff put a patient napkin on every patient every visit. It's the right thing to do to protect all our patients anyway.

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- 6) I've visited offices where the doctor's office door is lined up with the foot of a chair in the clinic or they have parent seating at the foot of a patient chair. This is a terrible idea because you are bound to end up with some kid in a short skirt in that chair. (Be sure to keep blankets on hand for these patients no matter the office design). Again, you don't have to look, you just need someone to think you did and accuse you publicly.

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- 7) Don't use one way glass in a doctor office overlooking the clinic. It creeps people out.

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- 8) Never ever make any type of inappropriate jokes with staff, patients, parents or other doctors.

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- 9) Alcohol is a big factor in a lot of office drama and staff blowups. It also often leads to situations where the doctor can get in a bind, be compromised or open him or herself up to liability. Be very careful at office functions and keep your head. Those kind of settings are not the time to let your guard down.

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- 10) We orthodontists and ortho residents have been sheltered a long, long time and thus think that other people are like us when it comes to drive, honor and integrity. They are not. There are many who will try and take advantage of you or may have designs on your pocketbook and they will use any means at their disposal to get access. Your employees have been in the workforce longer than you have and they are better at the game than you are.

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- 11) We have a rule in our offices that the male doctors are never left alone with female patients or parents. We don't want to find ourselves in a he said, she said situation with a patient looking for a windfall.

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- 12) The key is to avoid putting yourself in a bad situation where you will be forced to make hard choices. Don't avoid doing bad things, avoid the situations that lead to them and it will never be an issue.



I know I sound like a paranoid prude but I can tell you it's not unfounded – I've seen and personally heard dozens of situations like the ones mentioned here. I like a glass of wine as much as the next guy and I think my wife is smoking hot but there is a time and place for these things and that is not at the office or in the company of staff. I cannot stress enough that, at work (and basically in life in general), off color or sexually charged commentary or actions are unacceptable in any form and will lead to great pain and stress. Having an asexual, highly professional but fun office environment is one of the few things we did correctly from the beginning. I've seen dozens of offices where the sexual tension between the male doctor and female staff is palpable and it makes for a very unpleasant workplace where the staff are all competing to be the favorite. I can't imagine a worse hell. I also cannot imagine not being able to fire people who deserve it because they have witnessed me doing inappropriate or illegal things.... Because they have you if that is the case. Same goes for if you cheat on taxes, insurance, don't maintain office hygiene/sterilization or do anything of the sort - as soon as you fire an employee you will be sued or reported.

This is real, rubber hits the road kind of stuff ladies and gents. You're adults and professionals. Be very, very careful to preserve your dignity and honor for yourself, your family and your business.



COMPLIANCE



RULES



REGULATIONS



GUIDELINES

# AN INTERVIEW WITH *David Butler*

## ProOrtho:

**Tell us how you got into orthodontics?**

## David:

I grew up interested in the healthcare industry in general. I mostly knew the medical side of things with my dad being a hospital administrator so I always figured I would go into medicine. While in high school and college I shadowed a lot of different medical specialties and liked all of them. I realized what I really

liked was having someone come to me with something medically that needed to be fixed and being able to do that for them. When I met my wife, I kind of for the first time got a look at the dental side of things with her mom being a hygienist and grandfather and two uncles being dentists. After shadowing a few dentists and orthodontists I realized that I enjoyed it just as much as any of the medical specialties and could get there faster and with relatively less stress than the medical school route. Once in dental school I quickly realized I liked the aspect of orthodontics that people are coming to me because they wanted to improve something about themselves rather than because they were in pain or had to get a cleaning or cavity filled, they were EXCITED to meet with me (can't usually be said about going to the dentist). The changes I make in people's lives, not just physically, but even more so emotionally is rewarding on a daily basis.

## ProOrtho:

**How did you get from Ortho residency to being a partner in a large and successful practice?**

## David:

While in residency I was split between the benefits of doing an associateship and going straight into owning a practice. While looking for practices to buy, I was introduced to Scott Law and given an opportunity to associate with him at Central Texas Orthodontics. I quickly recognized the learning opportunity of working in such a successful and fun practice and side by side with Scott and quickly jumped on board. While looking forward to something long-term in Texas with Scott, my dad was diagnosed with Parkinson's disease. This was really tough because I planned on having time to eventually be financially secure enough to fly my family often to visit "Oma and Opa" (Dutch for grandma and grandpa) and suddenly that timeline became much shorter. In what I can only see as an answer to prayers, I out of the blue received an email from Dr Parkinson (quite the coincidental name) who had received a letter from me in residency and held on to it even though he at the time didn't have an opportunity. After much deliberation we eventually settled on becoming 50/50 partners right out of the gate. This has allowed me and my family to be much closer to my wife's and my family and allow our children to have positive lasting memories of their grandparents.

## ProOrtho:

**What did you learn along the way?**

## David:

Throughout all of these experiences, I learned early on the power of surrounding yourself with good counsel. From the book "The Richest Man Who Ever Lived" King Solomon says "Without counsel plans fail, but with many advisers they succeed." A teacher and mentor of mine while in





residency had an amazingly successful and well respected practice in town. It almost seemed unfair how much better things were run and how successful his efforts were compared to his competitors. My ah hah moment came when I learn he was part of the Schulman Study Group, where he was able to surround himself with some of the most successful orthodontist in the nation; GREAT council. Working with Scott I really learned the second part of the success equation, and by far the larger part of success: implementation. Great ideas are a dime a dozen, it's implementing them and sticking to what is successful and dropping what's not that sets the great apart.

#### ProOrtho:

**Tell us about your study group, Orthodontic Exchange.**

#### David:

Knowing the power of great council and realizing that the benefits of having teachers and classmates close by was ending upon graduation and that gone were the days where we could openly "talk shop" with our fellow local orthodontists (I learned that in the tense atmosphere of a Utah Orthodontist meeting I attended while in residency). I decided to form an online forum where we could continue to stay in touch and share ideas with each other. Facebook was an easy venue as we were all on it frequently anyways and fairly familiar with its posting and commenting format. What began as a small group of ortho friends grew into friends of friends and their friends so on. We are about 180 members and continue to grow, although since it is geographically exclusive to allow for open discussion, it's reaching a point where many are having to be turned away and an effort to concentrate the group to most valuable contributors is probably needed in the near future to keep the council shared at a premium.

#### ProOrtho:

**What advice do you have for residents and recent grads?**

#### David:

There is so much that you don't even know you don't know. This is especially true in business. There is a huge benefit to associate first out of residency if you can match up with a successful private practice. Don't get caught into doing what everyone else is doing. Look outside the industry. Find out what everyone else is saying can't be done, and do it. Christopher Morley put it well "Read, every day, something no one else is reading. Think, every day, something no one else is thinking. Do, every day, something no one else would be silly enough to do. It is bad for the mind to continually be part of unanimity"

#### ProOrtho:

**What is your view of how the profession will evolve in the next ten years?**

#### David:

Orthodontics is becoming a commodity where consumers think that they will get the same result no matter where they go and therefore it's very financially driven. Technology is dramatically changing



treatment option for patients and as it becomes easier for us to treat, so it does for dentists, or a lab tech in Costa Rica. I think that if we are not careful in keeping the public aware of the importance of our specialty training, our profession might not carry much weight beyond the most severe cases (read prosthodontist).

#### ProOrtho:

**What do you hope to accomplish in your career?**

#### David:

I hope to be able to work as long as possible, and enjoy the journey the whole way. I hope to keep a good balance between work, family, community and personal that I can't imagine ever having a need or desire to stop practicing.

#### ProOrtho:

**What's your definition of success?**

#### David:

Again in the words of Christopher Morley, "There is only one success - to be able to spend your life in your own way." For me success is having the freedom to live the life I want to live and pass on to my children the same desire to chase their dreams and know that anything is possible.

A great quote to live by I learned from Scott Law. From Henry Thoreau's Walden: "I learned this, at least, by my experiment; that if one advances confidently in the direction of his dreams, and endeavors to live the life which he has imagined, he will meet with a success unexpected in common hours. . . . In proportion as he simplifies his life, the laws of the universe will appear less complex, and solitude will not be solitude, nor poverty poverty, nor weakness weakness."

Success for me is knowing that I was part of something that changed lives for the better. That I created something (or someone) that will continue to positively impact people even after I'm gone.



# GROWTH DECISION & Practice Journey

By Scott Law

Today's progressive orthodontist faces a leadership conundrum; to determine a balance between growth, control and lifestyle while facing the struggle with delegation and lack high level business expertise.

I always wanted to envision myself as an Orthodontist/CEO. I wanted to be the wet fingered orthodontist and build and drive my business providing an amazing work environment for my employees and patients to thrive and progress. Fortunately with the help of multiple orthodontic consultants and savvy friends, my wife and I grew our office from 8 to 25 but she soon began to see that the same strengths that helped us grow were also those that were keeping us from growing, aka "the founder's curse". I realized that my vision to have all and do all was spreading me thin and was causing significant frustration among my team and at home. After plenty of coaching, analysis and coaxing I realized that in order to reach my personal goals at work and at home I was the one that needed to change. I needed to arrive to the point that I wanted something different more than I wanted things to stay the same. I was facing my fear of change.

In the process of deliberating options for growth, process improvement, and increased profitability we considered many options ranging from more consultants, to personal assistants, to a practice administrator and finally to an experienced CEO with a much greater

business knowledge and years of real world business experience. I realized that as much as I wanted to say I was an Orthodontist/CEO, I really wasn't. Sure we'd grown a nice practice but to take our operation to a truly enterprise level in addition to developing a orthodontic software company I knew that my desires alone weren't going to help us achieve it - I needed expertise. Interpersonally I had to fight my fear to give up authority and control, but as the organization grew, it had become nearly impossible for me to stay involved in every area of the company. I was my own worst enemy.

After articulating in my own mind my greatest value to the business and in order to play a true leadership role, I needed to allocate time to create the broadest value across the company multiplied by the scale of the organization. I realized the way to multiply an owner's value is to allow someone else to focus on the business while the Orthodontist focuses on what made them successful in the first place; excellent patient experiences and results and motivating their teams to deliver this experience and results.

## CEO DECISION

Jessica and I began to look outside the

orthodontic realm for our next step. We failed in our first several hiring attempts because we didn't define our "fit" and goals and desires within our own minds. We then decided to bring on a truly high level CEO to manage the business, drive it and help us to accomplish our vision. In April 2014, we took this bold step forward and hired Scottie Hudsmith as the CEO for our ortho practices as well as our software business Guru. ([www.orthoapps.guru](http://www.orthoapps.guru))

Scottie has always followed the philosophy that a CEO must be an Architect, Team Builder, Talent Scout and a Process Improvement Champion. As the Architect, the CEO does not have to be the visionary but must have the ability to take the vision and lead the team to a plan that creates a phenomenal business. The Talent Scout and Team Builder skills are necessary to build a great team. Attracting great talent requires a great team and development plan along with a culture which provides for individual and team success. In many cases CEO's are not very good at process improvement, while they understand and appreciate what needs to happen, generally they don't always possess the skills to actually design and implement the process. Fortunately good CEO's do know how to identify and motivate the necessary changes.



**HICCUPS ALONG THE WAY**

Within our practices, we've made the shift from the vision my wife and I had to now become a well architected plan. We have a great start on hiring and have an awesome team - process improvements are well underway. These changes have not come without some pain.

Soon after on-boarding Scotte several team members decided they did not like the change and left the organization. In the process they have attempted to hurt the business but a unified front of leadership lead by Scotte have minimized the impact of these disgruntled efforts. A significant amount of time over the last months has been focused on laying the foundation to create an environment of trust that focuses on building a healthy sustainable culture. It's been impressive to see how Scotte's talents and previous experience were so necessary to manage the unrest and concerns of our team as we grew from a family business to an enterprise level organization.

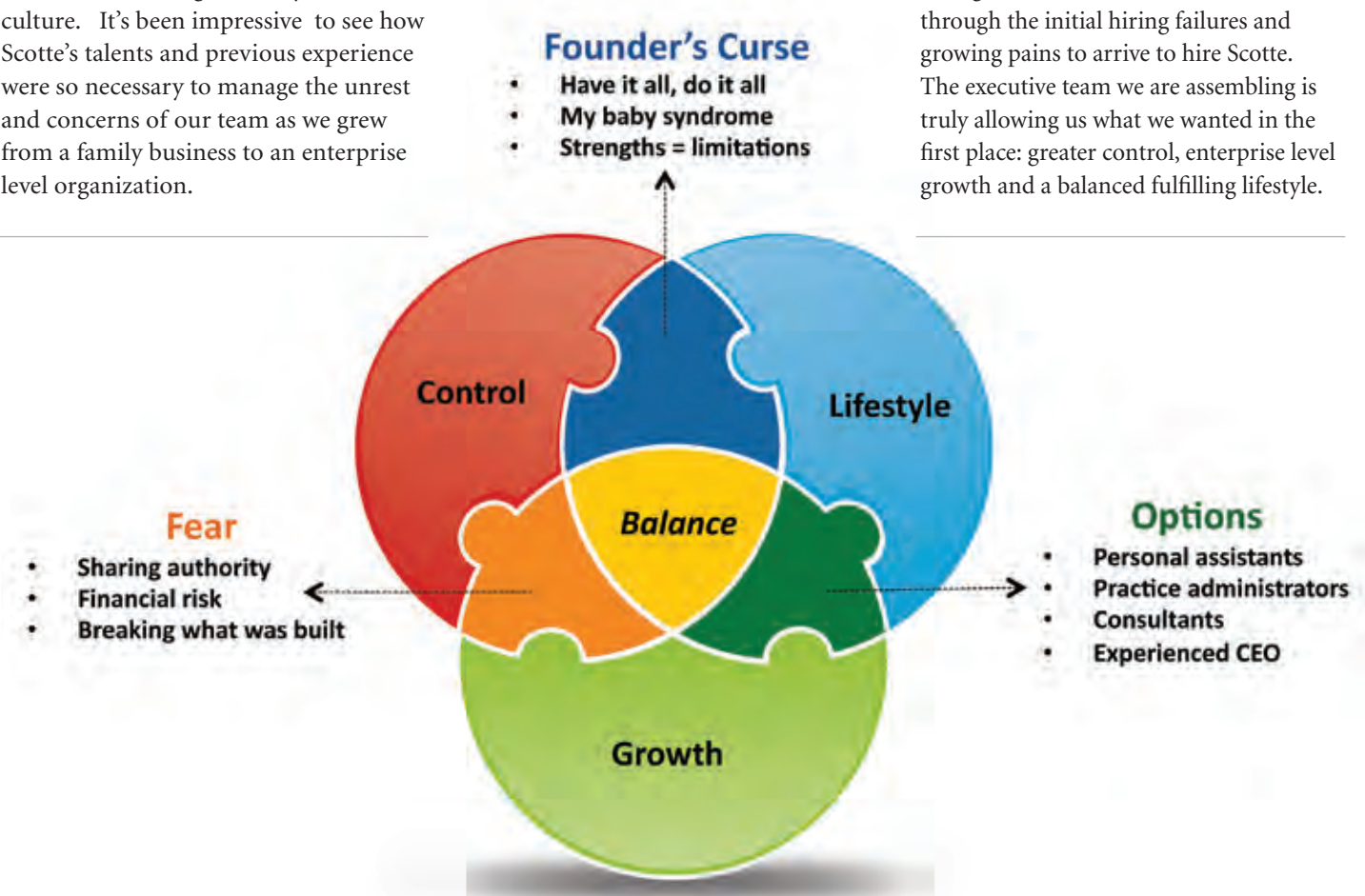
**ALIGNMENT AND PARTNERSHIP**

Nobody wants to hear their baby is ugly. As founders we all know that there are problems and a vulnerable underbelly of shortcuts and shortcomings within our businesses that we don't want to hear about. Remember to see them as opportunities! I quickly learned that the key to success is not taking anything personally but rather view everything as a new way for greater success. As a seasoned CEO Scotte already understood not to be offensive in these discoveries but instead talked openly and directly through these points. Communication and understanding are key to success.

**ADVICE FOR OTHERS**

First determine in your mind what you

want and the "why" behind the motivation to get additional help. There are many avenues, each with different risk levels and upsides, in the pursuit of your goals. These possibilities include advice from friends/study groups, industry consultants, 3rd party management services, high level employees, or partnerships. It is important to be fully aligned with your objectives as the impact of failure to change or choosing poorly is extremely detrimental to the future of the team, business, and patients. Choose wisely but don't be afraid of change. For me the answer was to bring on a CEO. In so doing I've been able to have even greater control and more time focussed on the parts I love of the business: working with patients, enjoying my team and driving our culture. I am glad that we stuck with our vision through the initial hiring failures and growing pains to arrive to hire Scotte. The executive team we are assembling is truly allowing us what we wanted in the first place: greater control, enterprise level growth and a balanced fulfilling lifestyle.



A BALANCED ENTERPRISE... WHERE DO YOU FIT?



## CONSUMER AWARENESS PSAS

By Jeff Behan – VisionTrust Communications

I'm excited to introduce two new videos in the Choose A Specialist consumer awareness campaign. These new videos continue our humorous look at the very serious issue of choosing a qualified specialist for orthodontic treatment. The call to action in the videos is for viewers to visit [chooseaspecialist.com](http://chooseaspecialist.com). If you haven't visited the site recently it's time to check out the all-new website designed to quickly differentiate the specialty. Long range plans are to expand this beyond orthodontics to all dental specialties but for now it's all about ortho. You can view all four of the currently available Choose A Specialist videos at: <http://bit.ly/VisionTrust-ChooseASpecialist>.

There are a number of ways you can use these patient education tools in your local market. The simplest approach is to link, or embed, the videos in your practice website and through your social media channels. You might even consider doing a "promoted post" on Facebook to make sure it goes beyond your existing network of connections and has a higher level of penetration in your area. Promoted posts are an inexpensive way (you can reach up to 25,000 people in your local area for about \$100) to get your message out to the right audience. A second approach is to run a local television campaign featuring the videos.

There's more to come in the near future, but we want to encourage you to link to these videos from your website

and practice social media pages. Also – if you're interested in running any or all of these videos on local media in your

community, be sure to contact Jeff Behan ([jbehan@visiontrust.com](mailto:jbehan@visiontrust.com)) to start the conversation.





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*Why do we all do what we do? Yes, we like to do “good” and help our patients, volunteer our time, and create great smiles, but all of us also love to “live.” Thus, the reason for this section.*

*The Progressive Orthodontist Magazine’s Lifestyle section is a chance to read about items of interest; a special place to visit, the latest gadget on the market, interesting hobbies, and this quarter’s feature – Holiday Gift Guide.*

# *lifestyle*

[ HELPING | VOLUNTEERING | CREATING | **LIVING** ]



# Holiday Gift Guide

Hard to believe that we are already thinking about the upcoming holiday season, but it will be here before we know it. This time of year is usually met with indecision, headaches and a flurry of last-minute shopping as you frantically try to balance life with finding the perfect gift for your favorite people.

To help you survive the shopping madness, we have put together some ideas for the special "someone" in your life.



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KATE SPADE



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IPHONE 6

# FOR TEEN GIRL



ANYTHING FROM KATE SPADE



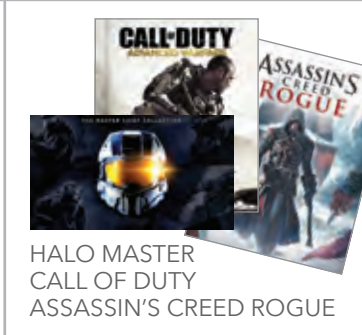
PINK CONVERSE SHOES



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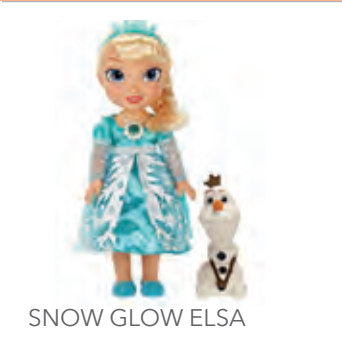
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## Dr. Burris.com

**Ben Burris, DDS, MDS**  
**Public Speaking & In-Office Education**  
**Email:** bgbdds@yahoo.com  
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In our ever changing world, those of us who want to run a dental business as opposed to owning a traditional practice (ie; owning a job) must think differently. Dental school and residency programs taught us how to be dentists but actually gave us a paradigm that makes it difficult for us to think properly about dentistry as a business. Where and how does one learn how to move from a practice to a business?

- **Speaking for study groups and meetings**  
**Full day program:** *The Referral Revolution*  
**Half day programs:**
  - *The Same Sun Shines on Us All - Embracing Opportunity and Refusing Defeat*
  - *Short Term Orthodontics - Where Does It Fit?*

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DENTSPLY's broad global product platform helps dental professionals serve patients' oral health care for a lifetime, from preventive services to tooth replacement. Our products range from general dental consumables and laboratory products to products supporting the dental specialty markets of orthodontics, endodontics and implants.

## Orthodontists for Access

**OrthosForAccess.org**

Orthodontists for Access is a new grassroots member organization dedicated to improving patients' access to care and educating the public about why orthodontic treatment should be done by an orthodontist instead of a primary care dentist.

In addition we will lobby for legislative reform at the state level to remove specialty license restrictions and allow mid level providers (ex: super hygienists) to practice independently. As a specialty, we believe that everyone deserves a great smile and that they should have access to the best quality of care and treatment available.

We are a network of licensed orthodontic specialists who believe that every child deserves a great smile. We also believe that we, as orthodontists, are perfectly positioned in healthcare to make this possible.

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Launched in 2008, Smile for a Lifetime Foundation aims to reach individuals with financial challenges, special situations, and orthodontic needs. The Foundation sponsors the orthodontic care of hundreds of patients each year.

Smile for a Lifetime Foundation has participating orthodontists throughout the US. Each chapter has its own local Board of Directors who chooses patients to be treated by the Foundation.

## Garrett B. Gunderson

New York Times Best Selling Author of  
***Killing Sacred Cows***  
**freedomfasttrack.com**  
**Facebook:** facebook.com/FreedomFasttrack  
**Twitter:** twitter.com/GBGunderson

In April of 2007, Garrett published his first book, entitled *Killing Sacred Cows: Defeating the 10 Most Subtle and Destructive Lies about Money and Prosperity*. *Killing Sacred Cows* presents the kind of revolutionary common sense that shines a bright light on the "elusive but obvious" problems plaguing the financial lives of so many people.

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Propel is an innovator and manufacturer of dental and orthodontic technologies. Propel's premier product the Excelleration Series consists of the Excellerator device and the Excellerator RT. The Excellerator and RT drivers are both used to create Micro-osteoperforations (MOPs). The New York University clinical study published in the November 2013 issue of the American Journal of Orthodontics & Dentofacial Orthopedics (AJO-DO) stated "Micro-Osteoperforation to be an effective, comfortable and safe procedure to accelerate tooth movement and significantly reduce the duration of orthodontic treatment." The Excelleration drivers are patented FDA Registered Class 1, medical devices specifically designed to be used by a clinician in conjunction with any orthodontic treatment modality. Similar to the Excellerator, the RT driver provides the practitioner with the same advanced orthodontic treatment, however it includes an autoclavable handle and disposable tips to minimize waste and maximize storage efficiency.



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**- Sheila Birth, DDS, MS**  
*Progressive Orthodontist Mag, May 2014*

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