



# A Phased Approach to Resuming Business at Your Dental or Orthodontic Practice

Positioning your practice for long-term  
success in a post-pandemic world.



# Introduction:

As stay-at-home orders are lifted and states begin reopening their economies, dental and orthodontic practices will begin opening their doors again and start figuring out the best ways to put their businesses back into motion. It's important for oral health professionals to remember that while their industries and the nation at large are starting to enter into recovery mode, business is not going to go back to "normal" overnight.

As a practice owner, you will need to take certain steps and precautions and do a great deal of strategic planning in order to resume business in a way that is safe for your

patients and staff members, as well as conducive to your practice's long-term success. Moving too quickly and neglecting to make the appropriate adjustments will only end up hurting your practice at the end of the day, and could put your patients and staff at risk.

This is why we recommend a phased approach to resuming business at your dental or orthodontic practice. We will break down this approach in four phases that explore general business operation considerations as well as tactics for the best way to market your practice and communicate with patients during each phase.

## The four phases include:

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- **Phase I:**  
Assessment of the Need
- **Phase II:**  
Patient Communication & Engagement
- **Phase III:**  
Building Trust & Recognition
- **Phase IV:**  
Patient Acquisition & Long-Term Planning



# Phase I: Assessment of the Need

(Pre-Opening)

There are still so many questions that have yet to be answered, even for practices that are already open or are preparing to open in the next few weeks. As the owner of a dental or orthodontic practice, you might be asking:

- **What should I do to sterilize my office?**
- **Which types of safety protocols and preventative measures should I be taking?**
- **Will I have adequate supplies, and will I have them in time for reopening?**
- **How many patients can I accommodate in person?**
- **How many staff members do I have, and when and how will I train them?**
- **Should I worry about aerosols—if so, how long should a treatment room go unused before it can be used again?**

If any of these questions are not yet on your radar, it's definitely time to start thinking about them. Our advice is to create a plan and write it down.

## Phase I

# Business Planning Checklist

### Your practice should:

- Order all necessary personal protective equipment (PPE) early enough** so they will arrive in time for your office's reopening.
- See to it that all new processes for your practice are aligned with federal and local requirements and documented** for both patients and staff. A few examples of such practices may include things like taking temperatures upon entry, making waiver forms available for patients to fill out prior to coming in, having patients wait in the car when they arrive, adopting online/paperless systems if they were not already in use, etc.
- Notify your staff about the reopening early on** so you have enough time to confirm they're returning to work, find replacements if you're able to, and train the whole team on your office's new policies and procedures.
- Order new furniture and necessary equipment with ample time** to ensure they arrive and are installed before your open date.
- Know what your new patient capacity will be each day and be prepared for that volume.** Due to restrictions, you may only be allowed to reopen at a lower capacity, such as 30% or 50% capacity.
- Make sure any telehealth services you're offering are clearly stated on your website** and communicated as an option to your patients.
- Prioritize scheduling by dividing patients into different groups** based on the level of need for care. Assign immediate appointment dates to high-risk patients and to those who have waited the longest time between visits, and assign later dates to lower-risk patients with less urgent needs.



## Phase I

# Marketing & Communications Checklist

Make sure your practice has:

- A fast, mobile-friendly website**  
Now is the perfect time to make sure your website is built with responsive design, meaning it automatically adjusts to fit the size of the user's screen, whether they're on a desktop, tablet, or smartphone. Your website should also have fast-loading pages, as more than half (53%) of mobile users will leave a web page that takes more than three seconds to load.
- Easy-to-find information about COVID-19 on your website**  
Add a banner to the top of your homepage that shares important information, such as the status of your office, and when you plan to open your doors again. Your banner should also include a link to any supporting content, or COVID-19 FAQ page.
- A social media presence**  
The COVID-19 quarantine gave people more free time, and that has resulted in more time spent on social media, explaining why platforms like Facebook are experiencing record usage. Make sure your social media profiles are set up, and begin sharing updates that are positive, and shareworthy.
- Consistent communication with existing patients**  
Be proactive about reaching out to existing patients. Reach out to them by phone, text, and email with brief updates and to let them know that you're planning for their safe return to your office.

# Phase II: Patient Communication & Engagement

(Reopening, Weeks 1-3)

Upon reopening, keep your priority on patient communication and engagement. When in doubt, over-communicate! Even with stay-at-home orders being lifted, patients are likely to still feel cautious about safety (and rightly so), so you will want to make sure they have all the information they need to feel comfortable visiting your office.

## Business Planning Checklist

It's important to:

- Keep your patient base informed** about the changes happening at your practice and what to expect when they come in for an appointment. Don't wait for your patients to ask you about these things when they call in—instead, be proactive in reaching out to them ahead of time.
- Assess your capacity for new patients.** With your doors open, your staff back in the office, and appointments with existing patients scheduled out for the next several weeks, assess the gaps you will need to fill to reach your desired revenue goals.



## Phase II

# Marketing & Communications Checklist

Follow these best practices:

- Make phone calls to reschedule and confirm new appointments, and then follow up on those calls by emailing a video** of you in your office telling patients what to expect when they come in for treatment.
- Continue posting positive and engaging updates and stories on your social media pages, and begin boosting these posts** in your local market for maximized exposure.
- Send email blasts to your existing patient base** with frequent updates about what your practice is doing to keep them safe. This will help to put them at ease.
- Revise the message on your website banner** to show your practice's updated status (such as from closed to open).
- Update the questions and answers on your FAQ page** to keep them timely and relevant.
- Incorporate advertising campaigns back into your marketing plan** if you removed them. For display ads, consider a tone that is confident and trustworthy. Continue branded search advertising and begin long-tail search campaigns, at a minimum.

# Phase III: Building Trust & Recognition

(Post-Opening, Weeks 4-6)

Now that so much has changed, you'll need to re-earn the trust of your existing patients. Like a new business opening, your practice is going through a reopening and patients are coming in with new expectations. Let them know why your practice is the top choice for their dental or orthodontic care.

## Business Planning Checklist

Make sure to:

- Identify a deeper purpose for your practice.** Patients respect their dentist or orthodontist when they go above and beyond to give back to their community or to a noble cause. Identify your practice's deeper purpose and how you can make a difference in your community, both now and over the long term.
- Begin offering telehealth appointments** (if you haven't already done so) for patients who would prefer not to come into the office. Not only does this allow you to better accommodate your patients, but it also gives you more opportunities to book appointments.
- Practice consistent patient follow-up.** Consider thanking patients who come in with a free mask or small bottle of hand sanitizer, and send them a survey after their appointment to gauge how they felt and what you can do to improve your process to make them feel safe.



## Phase III

# Marketing & Communications Checklist

Follow these practices:

- Communicate what you're doing in the community** (e.g., donating to a local food bank, donating face masks, etc.) and push this out on social media.
- Look at how your social media content and campaigns are trending and make adjustments** to better meet the needs and interests of your target audience.
- Stay on schedule with your email blasts to your existing patient base** so you can keep them informed with frequent updates.
- Keep an eye out for new positive reviews** you receive on Google and Yelp and feature them on your website and social media pages.
- Continue updating the COVID-19-related information on your website**, particularly your banner and FAQs page.
- Continue your digital advertising campaigns** and consider launching ads that promote your telehealth services, if you offer them.

# Phase IV:

# Long-Term Planning for Patient Acquisition & Practice Growth

(Looking Ahead, Week 7+)

We all know that things will never go back to the way they were in all aspects of our lives, and your dental or orthodontic practice is no exception. The way you operate your practice will evolve and permanently change. Your costs to deliver care may go up. Therefore, it's critical to have a plan that allows you to recover and secure as much as of your previous business as possible while also creating opportunities for new sources of revenue.

**The steps you take now can be the difference between future growth for your practice and potential closure. Keeping this in mind, here are a few steps to add to your long-term plan:**

- Assess your optimal patient capacity for growth.** Where are you today, and where do you want to be in two years in terms of your revenue? What type of patient volume do you need to hit that target?
- Consider strategies you can use to grow your practice and its impact on your local community.** For example, you may want to consider ideas such as membership programs; how your practice can expand on telehealth options; the possibility of adding new locations, doctors, and associates, etc. Identify your goals now so you can set up a marketing plan that will put you on the right track for where you want to be.
- If you don't already have one, find a reliable and strategic digital marketing partner** who understands your goals and what it takes to help your practice reach those milestones.



# Building a Better Future for Your Practice

While you had no idea what types of challenges you would face at the outset of 2020, it is possible to redeem this year and make it a catalyst for growth and development for your practice. With the right strategy and a team to help guide and execute that plan, your practice can be one that secures the trust of patients in your local community and earns their business.

To learn more about how you can make your dental or orthodontic practice a success in the post-pandemic world, call **Scorpion today 888.375.7159**. You can also learn more about how Scorpion helps medical practices at **[ScorpionMedical.com](https://ScorpionMedical.com)**



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