ORTHO2
EMPOWERING PRACTICES

Quarterly
Newsletter

October 2025
Volume 43 | Issue 4

Ortho2 Perspective

Is your practice ready to Power Up? We hope so! After 40 years of the Ortho2 Users Group Meeting, we're evolving. Powered by a simple idea: elevation. We're reintroducing our users' event as Power Up, a name that mirrors our energy, our power logo, and our mission to help you level up faster, smarter, and with fewer

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hurdles. The transition preserves the same community, the same excellence, and the same commitment to your success; only the name, look, and feel are new.

Our free 2026 Power Up event will be held virtually this February, where we will share knowledge, spark ideas, and continue advancing orthodontics.

A quick look back: For many years, Ortho2 hosted annual in-person events previously called Users Group Meetings. We've traveled to 11 states: California (our most visited, 8 times), Arizona (7), Nevada (6), Texas (5), Florida and Georgia (3 each), Louisiana (2), and Colorado, New Mexico, South Carolina, and Virginia (once each). Yet not all customers could attend in person. In the past decade, only about one-third of Ortho2 customers attended any Ortho2 meeting, and about half had attended at least once.

COVID-19 pushed us to trial virtual events. In 2021 and again in 2024, we hosted successful virtual meetings, each drawing more than 1,000 attendees and 3,500 class sign-ups. The format broadened our reach to a larger and often new audience. So, the value was clear.

In a survey, nearly 40% of Ortho2 users preferred virtual events. One quote stood out, "Both the virtual and in-person Users Group Meetings are very valuable to our practice. A virtual option should be available for those who cannot travel." We couldn't agree more. Ortho2 made the decision that moving forward, we will alternate in-person and virtual meetings as both have value and allow us to better serve our entire Ortho2 family.

Save the dates: Ortho2's next Power Up event will be February 26–27, 2026, from 10 A.M.-3 P.M. Central each day. That's right, we're expanding this virtual event to two days! We're excited to present 11 classes, including two all-new topics. We have also invested more into our virtual event platform to bring you better ways to interact with the Ortho2 Team and other Ortho2 users during the event.

And there's more. Believe it or not, we're already planning our next in-person Power Up event, likely in February 2027. Stay tuned for where we're heading next! I sincerely hope to see you at both events. ☼

Amy Schmidt

Amy Schmidt, Ortho2 President

Visit us at These Fall Meetings		
Mother of Pearls Conference	October 10–11, 2025
Western Orthodontic Conference	October 16–17, 2025
Southern Society of Orthodontists	November 6–8, 2025
Northeastern Society of Orthodontists	November 14–15, 2025

Slide Into Starts With Edge Proposal

Edge Proposal gives your patients' families a say in the terms of their contract proposals, to better fit their needs. They can electronically adjust the terms of the proposal to best fit their treatment and financial needs within the parameters you set.

There are a few things to set up, to get started.

Edge Proposal Set Up
Edge Proposal Add-Ons Editor

The Edge Proposal Add-Ons editor is used to create a list of extra treatment options available to the patients. Each add-on changes the overall treatment fee when applied to a proposal and includes a description and a fee. An image can be added as an option.

When patients use the Edge Proposal site to adjust the contract structure to meet their needs, they can see the add-ons linked to their proposal template and select which ones they want to include in the contract.

Creating a New Add-On

When you create add-ons, you need to give them a unique name and a description. Then, set the amount to be included in the proposal for the add-on, along with any image you would like to use for that add-on. You can choose from the default images available or add your own.

Edge Proposal Templates Editor

The Edge Proposal Templates editor is where you set up the templates you use for your proposals. Each template includes the treatment fee amount, number of months, any finance charges, and available discounts. You can also set up default payment structures, as well as choose which add-ons to use in the contract.

Note: Complete the Add-ons editor first. If you do Edge Proposal Templates editor first, you will have to open the editors to add the add-ons.

Creating a New Template

Click on the Create New Template button in the Edge Proposal Templates editor and then use the window that opens to set up the basic framework of the proposal. Give it a name and select at least one treatment. The template will be available when you make a proposal for that treatment.

Next, give the proposal template a title, a description, and an image. Giving a proposal both a name and a title may seem redundant, but it is needed. The Name is what the template is named inside Edge Cloud, while the Title is what your patients and their families see on the Edge Proposal website.

The last details to add are the total treatment amount, minimum down payment, and the contract length. Once the template is created, you can add or change other items like discounts, default payment options, as well as any add-ons.

Other Editors

Before we start creating proposals for patients, there are a few more things to configure.
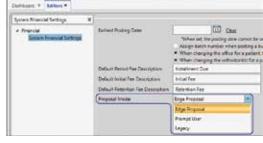
Adding a Logo to Edge Proposal

A logo can be added to the Offices editor. Once added, it will automatically be added to Edge Proposal as well.

Emailing Edge Proposal Links

Once an Edge Proposal is activated, you have options to send out links to view the proposal options to patients and their families. If you want to send emails, make sure to add an email address into the Email and Financial Email fields in the Offices editor.

Note: Edge Proposal is optional. If you prefer the older method to set up proposals, or would like to be prompted for a choice each time, this can be set in the System Financial Settings editor:

- **Edge Proposal:** This will set Edge Cloud to only use Edge Proposal.
- **Prompt User:** This will bring up a prompt asking which method you wish to use.
- **Legacy:** This will set Edge Cloud to only use contract templates.

Creating Proposals
Creating a new proposal for a patient starts with opening their Finance tab. Then, either select New Proposal from the Patient ribbon, or click on the Edge Proposal button and use the Click To Create button. The *Create Proposal* window opens to let you set the proposal details.

Select Treatment Options Tab

In this tab, open the Treatment menu, and choose a treatment. Then, select at least one option from the templates available. If you don't select a template, the proposal cannot be created. If multiple options are selected, then the patient will be able to choose between them. Once you have a template selected, click Apply Template(s) to move it over to Selected Options, and click Next.

Members and Insurance Tab

This tab has two sections:

- **Responsible Parties:** This is where you choose who is included on the proposal. It will list the names of all responsible parties connected to the patient's record and their relationship to the patient.
- **Insurance:** Select any insurance companies that will be included on the proposal. This will list all the insurance details that can be a contract member.
  - When you choose an insurance detail to include in the proposal, enter the insurance's estimated allocation into the box named Est. Amount. For example, if they expect the insurance to cover $1,000 of the contract, enter $1,000.00 into the box.

Check the boxes for all contract members that need to be in the proposal. Then, click the Next button to move to the Confirmation tab.

Confirmation Tab

This tab has three sections for the users to set up or review:

- **Proposal Options:** This section will show the patient's name, as well as their age; expiration, where the user can set an expiration date for the proposal; and a menu for the practice to set a treatment coordinator, if needed.
- **Payment Dates:** This is where the user can set when monthly charges are due. Choose the day of the month, the number of days after the start date, and whether

Steve Mahan

Steve, Ortho2 Software Support Advanced Tech, has worked at Ortho2 since 2011, always endeavoring to help our customers with the various questions and challenges they may face in their day-to-day practices. When not at work, Steve spends time with his family, reading, enjoying movies, and gaming with friends.

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Fall Reset

With school back in session, it is a great time for offices to hit a reset and regroup after the busy summer. The focus on production and a busy schedule often does not give us time to really look at our systems and protocols. Taking time to review your systems and develop a plan will give you and your team the tools needed to have your year end with a strong finish.

Your schedule template should be reviewed on an annual basis to confirm it meets your current needs and goals. Those coveted before- and after-school appointment slots vanish fast, leaving costly mid-day gaps that drain productivity. Your schedule shouldn't look like an hourglass, with bottlenecks at the top and bottom and empty space in the middle. It takes the entire team to build and manage a streamlined daily schedule. Schedulers must follow the template, the clinical team must code procedures properly and use doctor time according to the schedule, and doctors must trust their team to guide them through the day.

A smart, data-driven template can keep your days balanced, your production steady, and your team working at an efficient, but not frantic, pace.

1. **Start With Data**
   Before you can design the perfect schedule, you need a clear understanding of your practice's numbers.
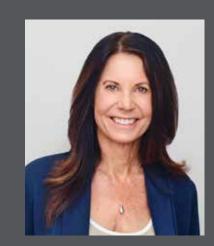
   - **Production Goals:** Know your daily production targets first. From there, work backward using your exam conversion rate to determine how many exams you need each day.

   - **Procedure Types:** Numbers never lie, but the team must be using codes consistently for the numbers to be an accurate count of procedures.

   - **Procedure Timings:** Determine how much time procedures really take. If you haven't conducted procedural time studies for a few years or more, your office may be miscalculating how much time you typically need to perform treatment at a productive pace. Often,

Andrea Cook

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A Team Approach to Conflict Resolution

We all know when it happens. You are having a perfectly good orthodontic day when suddenly you glance over, and two team members are having a challenging time with each other. Then just as sudden, the conflict begins to seep throughout the practice. There is a raised eyebrow, a down-turned mouth, a frustrated stomp out of the clinic, and somehow it begins to affect the whole team. The patients/parents scheduled for that day, unfortunately, feel it as much as the team. This is certainly not where you want to go in terms of your astonishingly great patient experience or your supportive and productive work environment. There must be a better way, and there is! Since some occasional team conflict is inevitable, a strong and agreed upon team conflict protocol is required. The entire team needs to practice and fine-tune their toolbox of conflict solutions so that any conflict can be spotted as it first begins and any flames can be immediately extinguished.

Prior to my visits with orthodontic practices, I ask that all team members complete an anonymous survey to help me understand and identify individual opinions about different practice areas that are strong and other practice areas that need attention. One of the questions that can be very revealing is the following:

If you could improve one thing about the team that currently negatively affects the teamwork environment, what would you change in the next 12 months?

Not too surprisingly, this question almost always identifies team conflict as their biggest concern. The problem with conflict is that for a workplace to be efficient and productive, the team needs to avoid disruptions on work related tasks or team projects. Any conflict that occurs is disruptive by its very nature. It is disruptive not only to the people immediately involved in the conflict, but it also subtlety disrupts the other team members.

Prior to developing a team conflict protocol, it is critical to consider and discuss the many valuable resources, both tangible (the cost of paying team salary for time that is not focused on practice development or patient care) and intangible (energy and focus), that are wasted during conflict. Conflict is not only disruptive, it is extremely financially costly to the practice. Focused team effort and

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Natalie Beaton has more than 30 years of hands-on experience as a Treatment Coordinator and Financial Administrator. She works exclusively with Ortho2 clients to maximize their use of the Edge Cloud and ViewPoint systems in all critical practice areas.

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Building Better Relationships Through Technology: The Latest Marketing Tools for Orthodontic Practices

In orthodontics, the foundation of success has always been relationships between patients and their orthodontist, between orthodontists and referring doctors, and between practices and the communities they serve. But the way these relationships are built and nurtured has changed dramatically in the past decade.

The patient journey in orthodontics has shifted from general dentist refers patient to orthodontist, to patient talks to friends and work friends, and looks at online reviews and social proof before finally choosing an orthodontist.

In other words, the referral from a general dentist is now just one step in a much larger decision-making process. Patients consult friends, seek opinions from coworkers, and turn to online reviews and social proof before ever contacting an orthodontist. It's no longer enough to rely on referrals alone. Practices must now nurture trust not only with referring doctors, but also directly with patients and their broader networks—both on and offline.

Today, patients and doctors expect a higher level of convenience, personalization, and transparency. Technology, once viewed as a back-office tool, has become a front-line driver of connection. The best marketing platforms make it easier than ever to foster trust, improve communication, and create meaningful engagement that lasts beyond the initial consultation.

This article explores the newest technology-driven marketing tools and how orthodontists can use them to deepen their most important relationships—with patients and with referring doctors. Today's marketing tools allow orthodontic practices to expand their reach, build credibility in multiple areas, and maintain stronger connections with community, patients, and referring doctors. Far from replacing human relationships, these tools amplify them—ensuring orthodontists remain visible, trusted, and top of mind throughout the patient journey.

Why Technology Matters More Than Ever

Orthodontics is a high-involvement healthcare decision. Patients and parents don't choose a practice willy nilly; they weigh expertise, convenience, reputation, and the overall experience. At the same time, referring doctors want confidence that when they refer a patient, they'll be treated with expertise, respect, professionalism, and timely communication.

In the past, these trust-building steps happened almost entirely in person: goody runs by cheerful team members, CE events at the office, chairside conversations, mailed progress letters, or a handshake at a study club. Those elements are still valuable, but now they are only part of the story.

Patients are listening to their friends. They are reading reviews online. They are comparing social media feeds. And they are often making a decision about your practice long before they step through your door.

Technology gives orthodontists the ability to stay relevant in this expanded journey by:

- Delivering personalized communication at scale
- Making the referral process seamless and trackable
- Building credibility through online reviews and social proof
- Providing transparency and education to patients and families
- Freeing up the team's time for higher-value, personal interactions

Patient-Facing Technology: Meeting Patients in Their New Journey

AI-Powered Communication

Patients want immediate answers, and if they don't get them from you, they may move on to a competitor. AI-powered chatbots can provide 24/7 coverage, answering common questions, scheduling appointments with the Ortho2 online scheduler, and even followup scheduling text reminders to new patients who haven't scheduled yet.

This matters because in the new patient journey, delays are costly. A parent might ask friends at school pickup for orthodontist recommendations, visit a few websites that evening, and if no one responds right away, they'll book with whoever does. AI assistants ensure your practice is always responsive, positioning you as convenient and reliable.

Personalized Video Messages

Word-of-mouth has always mattered, but in today's journey, personal touches carry even more weight. A short, personalized video message from the orthodontist can turn an interested parent into a booked patient.

Examples include:

- A personalized welcome video sent to new patients before their first visit
- Progress updates that parents can share
- Personalized treatment messages for specific issues or protocols
- Thank you videos after a referral or positive review

These aren't just nice touches—they extend your reach into the friends and work friends part of the patient journey. When parents replay or share these videos, they amplify your visibility far beyond the exam chair.

Review and Reputation Management Systems

In today's patient journey, online reviews are often checked before the orthodontist is selected. Patients frequently check Google or Yelp before they ever call your office. That means reviews have become a critical middle step between referral and action.

NFC taps or automated systems that request reviews at the right moment, such as after debonding or an excellent appointment, help capture patient enthusiasm and convert it into social proof. Practices that actively manage their reputation not only attract new patients but also reassure referring doctors that their patients are in good hands.

Doctor-Facing Technology: Strengthening the First Step of the Journey

Even though the patient journey now includes friends, coworkers, and online reviews, the general dentist is still the starting point for many orthodontic cases. Technology helps make that first step stronger and more reliable.

Referral Tracking Dashboards

The challenge for orthodontists has always been measuring referral activity.

With referral dashboards, orthodontists can see:

- Which dentists are referring consistently
- Which referrals convert into consultations and starts

Beth Leach

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the initial fee is due immediately or at a later date.

• **Summary:** This summarizes the proposal so far.

When you are ready, click the Create button to add the proposal to the patient's record.

Managing Edge Proposals

Once a proposal is created, you can review it and make changes to better fit the patient's treatment and needs. This is also where you can go to share the proposal with patients and their family. Lastly, you can update the proposal status from this window, or activate the proposal.

Proposal Status

The Proposal Status shows how close the proposal is to becoming a contract. It can be one of these statuses:
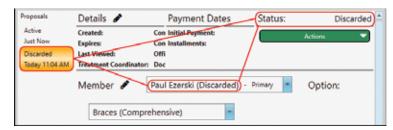
• **Pending:** Proposals are set to Pending when they are first created. You can only edit proposal details when they are in the Pending status.

• **Active:** You activate a proposal when you have finished editing the proposal details. While in the Active status, patients can use the Edge Proposal website to select treatments and payment plans. You cannot edit the proposal details in this status.

• **Accepted:** When the patient confirms the treatment and contract terms on the Edge Proposal website, it moves the proposal from Active to Accepted. When the proposal is in this status, it is time to create the contract from either the patient's Finance tab or from the Edge Proposal widget.

• **Waiting:** This status is used when a proposal has multiple responsible parties. When a patient has more than one responsible party on a proposal, one party is set as the primary. If there are any decisions about treatments or add-ons, the primary party must answer them first on the Edge Proposal site. While the primary party is making those decisions, their proposal status is Active, and any other responsible party's status is Waiting. After the

primary party confirms their contract terms, their statuses will be swapped, and the other party then looks at their proposal options. Once all parties have confirmed their proposals, both statuses change to Accepted.

• **Expired:** This shows that the proposal's expiration date has passed without the proposal being accepted.

• **Rejected:** This status can only be applied by the practice, and it states that treatment has been declined by the patient at this time.

• **Discarded:** This status can only be applied by the practice, and it states that the proposal was deleted from the patient's Finance tab. Discarding a proposal prompts for a reason, like changing the contract structure. Use this only in case of deleted/operator error.

Editing Proposal Details

When the proposal is in the Pending status, you can click the pencil icon beside each section of the proposal to edit the details.

• **Details:** This option opens the *Edit Proposal - Office Details* window, which allows you to change things like the treatment coordinator, email address, and phone number used to send the proposal link to the patient. The email address and phone number should auto-fill if you have that information filled in the Offices editor.

• **Member:** The member section lets you choose a proposal member and allows you to edit the email address and phone number at which responsible parties will get the messages about the proposal. These fields pull from the Responsible Party contact details for Email and Cell.

• **Breakdown:** This is where you can edit the structure, discounts, and add-ons for the proposal, each on their own tab.

Activating and Sharing the Proposal

When your proposal is ready, click the Activate Proposal button to finalize your proposal settings. Once you activate a proposal, you can no longer edit the details. As soon as you click Activate Proposal, the *Proposal Communication* window opens so you can send information to responsible parties by email or text message. It also creates a QR code they can scan in the office.

First, choose which message to send. Introduction is made for brand new proposals, while Follow-up is a reminder sent later, if they haven't responded yet. Speaking of that, if you need to send follow-up messages, you can click the Share button at any time in the patient's Edge Proposal tab to open the Proposal Communication window again.

Proposal Actions

You can manage proposals from either the patient folder Finance tab or the Edge Proposal widget. Click the Actions button to create the contract with the current settings, mark the proposal as treatment declined, or delete the proposal.

Edge Proposal App

When you are happy with the proposal templates and have activated the proposal, it's time for responsible parties to take the reins, choosing their treatment options and designing their own payment plan with the Edge Proposal app. Once they click the link, they start by clicking Explore Payment Options.

Choose Treatment

If you are offering more than one treatment proposal for this patient, (like clear aligners and traditional) an option appears for each. After the family chooses one, the Edge Proposal app opens, showing the patient's name and proposal options, along with the available add-ons and contract sliders.

Fine-Tune the Contract Structure

Responsible parties can select one of the default options or use the Edge Proposal sliders and the add-on treatment options to design their own contract structure that fits their financial needs and treatment goals, within

the parameters set for the selected template.

For example, if they adjust the down payment amount or monthly payment amount, the number of payments remains constant. So, if they decrease the monthly payment, the down payment will increase, and vice versa. They can also change the number of monthly payments with its slider. They can also lock the number in place, such as locking months at 24, and only adjust the dollar amounts.

Accept Contract Terms

When your patient is satisfied with the proposal, they click Confirm Payment Plan. This changes the proposal's status to Accepted inside Edge Cloud. From there, you can go to either the Finance tab of the patient folder or the Edge Proposal widget to create the contract. ○

Welcome, Avary!

Big congratulations to Taylor Aukes, Ortho2 Accountant, and her husband, Tyler, on their newest addition! Avary Jean Aukes arrived on May 8, 2025, weighing 6 lbs, 15 oz and measuring 18.5 inches long. Proud big sister Payton is already on the job, and we couldn't be happier for the whole family!

all the reasons you do the work that you do, gets lost in the chaos of conflict.

What works is a team approach to a team problem. Since each workplace has different conflicts that they deal with, your team needs to come up with a protocol that works for your specific office and team. You need to agree, as a team, on how to most effectively identify and defuse every conflict, keeping that conflict from distracting one or more team members from their work tasks that need their focus. You need to create a work environment where all team members have been trained and have carefully practiced having the ability to address the conflicts that will inevitably occur. We want to minimize the ability of the conflict to negatively impact the practice and, finally, move beyond the conflict in a timely manner.

The first step is developing a team protocol to the steps you all agree to take when a conflict occurs. In my survey, I ask the following questions:

What steps would you typically take if you had a conflict with one team member?

Describe how you would prefer that a team member resolve a conflict with you?

After reviewing many surveys, I have found that people typically prefer discussing a conflict one-on-one. The team wishes that the person would have talked with them first rather than talking to other team members about the conflict. The more people that are involved, the harder it is to diffuse the situation.

Each office has different needs, and your conflict resolution agreement needs to address solutions for your specific needs. Acceptable solutions or enforceable guidelines need to be developed for your work environment. I recommend having a team meeting to discuss this agreement, writing

up a conflict resolution agreement, and having each team member sign it.

It's interesting to me that conflicts can play such a key role in disrupting the flow of the orthodontic practice, but we so rarely put time into improving our team and individual skills. Once you have taken the time to define a conflict resolution agreement, it is time to begin the work needed to refine the skills of all the team members using conflict resolution games.

There are many great books exploring conflict resolution games that can become a part of your monthly meeting or be used at a separate time to practice your team skills. These short (15- to 30-minute) games allow all team members the opportunity to practice conflict resolution to discover what works and what doesn't work, increase their ability to resolve or avoid conflict, and ultimately transform conflicts into collaboration. Use of conflict resolution games will help the team identify the characteristics and skills needed to transform conflict in the workplace. And it will ultimately turn your team into a better functioning team.

If your practice has struggled over the years with team conflict, it is so hard to see that anything will help this situation. You may even find that some of the conflicts have been hanging around for months or even years. Developing a conflict resolution agreement and then practicing your skills really does work.

If you are interested in exploring this topic further, I invite you to attend my Cutting-Edge Webinar on December 2nd at 7:30 P.M. Central time. I will be sharing an example of a Conflict Resolution Agreement and giving examples of some highly effective games. I hope to see you there! ↻

Welcome Kinsley!

Congratulations to Marley Probasco, Ortho2 Regional Manager, and Jaret on the arrival of their sweet baby girl, Kinsley Marie! She made her debut on Monday, June 2 at 2:39 pm, weighing in at 6 lbs, 9 oz. We're so excited to welcome this little bundle of joy to the world!

needing more time isn't about the procedure, it's about waiting for the doctor.

- **Historical Appointment Counts and Workdays:** Knowing your averages will help you determine the appointment volume needed to serve your current patient base.

With accurate data, your starting template will be built on facts—not guesswork.

2. **Determine Your Digital Path**

   Having a clear plan on your digital path will guide you on the procedure changes needed as well as time set aside for team members to manage the digital workflow. There are great digital tools available, but without time and management they will not produce the results you are looking for. Additional frustration from your team will sabotage the best digital solutions.

   - Assess your current digital skills and knowledge.
   - Identify your goals and what struggles you want to resolve.
   - Research relevant tools and platforms that align with your

objectives.
   - Create a plan outlining the steps needed to reach your goals and the responsible team members.
   - Engage with online communities for support and resources.
   - Continuously evaluate your progress and adjust your strategy as needed.

3. **Design for Growth**

   Don't just plan for today's needs, build in space for tomorrow's. Base your template on actual appointment counts, then add a percentage for anticipated growth so you can scale without disruption.

4. **Optimize Your Day**

   Create a template that will enable you to optimize your performance.

   - What's the best time of day for you to perform more challenging procedures?
   - How many scheduling slots should you allocate for seeing new patients or handling emergencies in an average week?
   - How much time is needed without patients scheduled

to allow team members to complete non-patient tasks, such as digital workflow or reporting.

By answering questions like these, you are defining a day that would be ideal for you and your team. Design a template that reflects these preferences and train your team to do their utmost to follow it.

5. **Look Ahead**

   Once you have your templates built and implemented, the goal for the scheduling coordinator is to have an average of the same number of appointments filled every day. If your schedule has days with much higher or lower numbers of scheduled appointments, your scheduling coordinator needs to be looking ahead on a daily, weekly, and monthly basis to maintain appointment counts.

When you define your ideal day, it works like other performance targets, motivating you and your team to achieve it every day. Some days will still be less than ideal, but the overall results will be significantly better than if you continue using outdated scheduling techniques. ↻

- Where patients drop out of the journey
- Long-term trends that highlight partnership opportunities

This data isn't just operational—it strengthens relationships. Thanking top referrers, identifying offices that need more support, and tailoring communication becomes easier when you can share accurate, actionable insights.

NFC and QR-Enabled Sharing

If patients once moved directly from a general dentist to orthodontist, now they often pause to consult friends and check reviews. That makes referral speed and simplicity more critical than ever.

NFC and QR technology ensure that referrals don't get lost.

- A dentist asks their patient to tap an NFC card, and the patient instantly receives your contact card and a scheduling link on their phone
- You automatically receive a message telling you that the patient has been referred
- An NFC bracelet or QR code at the first visit with the TC leads to a new patient referring friends by simply sharing your contact through their phone, all of which is completely trackable
- A patient shares their custom trackable referral link on a Facebook moms group which allows new patients to be tracked directly back to the mom who shared the link

These tools keep the referral strong, even as the patient steps into the friends/work friends/online reviews loop.

Data-Driven Insights: Guiding the Whole Journey

The modern patient journey has many steps: dentist, patient, friends, coworkers, reviews, and finally the orthodontist. Without data, it's hard to know where patients get stuck.

Modern platforms solve this by offering clear analytics. Practices can track which dentists are referring, which team members are asking for reviews, and which online campaigns generate actual starts. Instead of guessing, orthodontists can invest confidently in the strategies that move patients forward.

For example, if you see referrals from a certain GP are high but conversions are low, you may need to improve follow-up communication or education. If reviews drive most new

patients, you can double down on reputation management. Data transforms the journey from a black box into a measurable pathway.

Balancing High-Tech with High-Touch

It's important to emphasize the goal isn't to replace the human touch. Relationships in orthodontics will always be built on smiles, personal conversations, and trust.

Technology simply ensures that these human moments don't get lost in the new, expanded patient journey. When communication is immediate, referrals are seamless, and reviews are authentic, orthodontists can focus on what they do best—providing excellent care.

Action Steps for the New Journey

To align with today's patient journey, practices can start with a few simple steps:

1. **Map Your Own Patient Journey:** Where are your patients coming from—dentists, friends, reviews? Knowing this helps prioritize your tools.

2. **Adopt a Patient-Facing Upgrade:** Start with video messages, review automation, or AI assistants. Each enhances your reach into the patient's wider network.

3. **Strengthen Your Referrals:** Use dashboards to track, NFC/QR to simplify, and education to deepen relationships.

4. **Train Your Team:** The best tools only work when team members know how to use them confidently and consistently.

5. **Measure and Adjust:** Use data to refine your strategies. Look for gaps where patients drop out of the journey and fix them with targeted tools.

The Future of Orthodontic Relationships

The orthodontic patient journey will continue to evolve. Friends, online communities, and digital reviews will only grow in importance. But the fundamentals remain unchanged: patients and doctors want trust, convenience, and communication.

By blending high-touch care with high-tech tools, orthodontists can ensure they remain relevant in every step of the journey—from the dentist's referral, to the friend's

Welcome, Stetson!

Congratulations to Mikayla Morrison, Ortho2 Project Manager/Business Analyst, and her husband on the birth of Stetson David! He made his debut on June 4, 2025, at 11:31 pm, weighing 7 lbs, 5 oz and measuring 19.5 inches long. Sending warm congratulations to the Morrison family on their sweet new arrival!

Celebrating Ortho2 Anniversaries

Congratulations to these Ortho2 team members who celebrated anniversaries during the third quarter of 2025.

Twenty Years
Michelle Kinnaman

Seventeen Years
Cal Rebhuhn

Sixteen Years
Judy Denny

Fourteen Years
Brent Jacobsen
Steve Mahan

Twelve Years
Wesley DeShaw

Eleven Years
Nathan Hemmings
Jorge Rios

Seven Years
Darcy Dakovich

Five Years
Jeff Brockway
Marley Probasco

Three Years
Samantha Armstrong
Jasmine Snell

Two Years
Omar Karin
Greg Van Riper

EDGEucate Yourself With EDGEpisodes

Looking for EDGEucational content to help you become an Edge Cloud guru? Our brand new EDGEpisodes series is perfect for you! These bite-size videos will provide you with quick and easy tips to master all things Edge Cloud and are easily accessible on Facebook and Instagram.

advice, to the online review that seals the decision.

The most successful orthodontic practices today understand that the patient journey is no longer linear. It's a loop of referrals, social proof, and digital touchpoints. By adopting tools such as AI communication, personalized video, referral dashboards, and education, orthodontists can meet patients

and doctors at every step—strengthening the relationships that drive growth.

The future of orthodontic marketing isn't just about visibility. It's about relationships—and technology is the bridge that makes them stronger than ever. ↺

ORTHO2
Newsletter

October 2025 Volume 43 | Issue 4