ORTHO2
EMPOWERING PRACTICES

Quarterly
News*letter*

The Newsletter for Members and Friends of Ortho2

Ortho2 Perspective

The start of a new year is a natural time to reflect on your business, your patients, your team, and even yourself. It's also an opportunity to reset your focus, define new goals, and think more intentionally about where you are and where you want to go.

At our most recent orthodontic advisors meeting, we did exactly

that. A group of Ortho2 leadership and orthodontists conducted a SWOT analysis (strengths, weaknesses, opportunities, and threats) to look at where Ortho2 stands today and where we can continue to improve. We are sharing this as it's a good reminder for any business, but to also shed some light on how we continue to improve so our customers can be successful. Below are a few key takeaways I'd like to share with you:

Industry Leadership. Ortho2 has proudly been serving the orthodontic community for nearly 45 years. In an industry where software companies come and go, our longevity speaks to our stability, consistency, and commitment to evolving with the profession. We are proud to set the pace for future trends.

Customer Service. Our support team brings more than 250 combined years of experience to every interaction. Many of our representatives come directly from orthodontic practices and have over a decade of hands-on industry experience. That means when you call or email, you're speaking with someone who truly understands your world. We're proud to answer calls as they come in and respond to emails within one business day.

Customer Knowledge. We hear from many customers that they know they aren't using Edge Cloud fully, but they don't know what they're missing. We want to change that. I encourage you to attend our Power Up event, February 26-27. It's two days of classes dedicated to teaching you the best practices in Edge Cloud. And it's free! Register today on our website.

Communication. Strong communication is the foundation of any great partnership, and we're committed to strengthening ours with you this year. Our goal is to provide clearer, more consistent updates on new features, integrations, known issues, and our development roadmap. Be sure to register for Power Up, where you'll hear about future plans for Edge Cloud.

The new year brings new goals, new opportunities, and plenty to work toward. I encourage you and your team to take time to define what success looks like for you in 2026. Taking an honest look at your strengths and challenges isn't always easy, but it's how strong teams create clarity, unlock growth, and set themselves up to succeed. ☼

Amy Schmidt

Amy Schmidt, Ortho2 President

Free Cutting Edge Webinar Series

The Cutting Edge Webinar Series features industry-leading consultants and doctors presenting on their expertise in the field. These webinars are free and for anyone - from resident to experienced doctors and staff.

Scan the QR code for a full calendar of webinars and recordings. Webinar recordings can be found at the bottom of the page and will be available for three months after the webinar takes place.

POWERUP
AN ORTHO2 EVENT

February 26 & 27, 2026
10:00 A.M. - 3:00 P.M. Central Time

Register Now!

Free. Virtual. High-impact. Are you in?

Power Up 2026 is designed with one goal in mind: helping you get more out of Edge Cloud every single day.

Join us virtually on February 26 & 27, 2026, from 10:00 A.M. to 3:00 P.M. Central each day to level up your Edge Cloud skills.

Here's a look at what you can expect to learn at this year's event:

- ⚡ Time-saving shortcuts that streamline your daily workflow
- ⚡ Smart setup tips that reduce errors and boost consistency
- ⚡ Tools and features you may not even know you have
- ⚡ Insider insights, tips, and live Q&A directly from Ortho2 experts
- ⚡ And a whole lot of "I didn't know I could do that!" moments

Whether you're brand-new or a seasoned user, you'll leave with ideas that make your work faster, smoother, and more efficient.

100% free. 100% virtual. 100% worth your time.

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Workflows: Chart Your Automations

Hands down, one of the best tools in Edge Cloud is workflows. With all the things it can do in Edge Cloud to automate your processes, it is one of the most powerful tools. Whether it's changing a patient's status, adding a patient to a stack or task, merging letters, or simply displaying a pop-up to remind the front desk of something, workflows is there to help.

One of the more underutilized ways that you can trigger a Workflow is by doing a treatment chart entry. Changing the patient's status automatically during a new patient exam, sending a hygiene letter or extraction request, or adding the patient to the Appliance Tracker can be done without extra work by simply charting as you normally do.

Change Status During Exams and Consults

Hopefully, you have multiple treatment chart styles. We recommend having different styles for at least pre-treatment, braces, aligners, and retention in the Treatment Hub. The different styles allow you to have different columns as needed. For example, the braces style would have upper and lower archwires, while the aligners style would have upper and lower trays.

To automate a status change, add a Next Status column to your style. In this example, we'll add a dropdown list column to the pre-treatment style. The list should include statuses a patient can move to after an exam or consult. Once you choose the next status and save the treatment chart, the patient's status is automatically changed.

Setup

Here are the steps you need to set up this workflow. Click on Editors in the Home ribbon bar > Workflows. Click on the Wand icon WITHOUT the green + to create a new workflow using the wizard. For the Activity, choose Change Status. Use the dropdown list to select a Status the patient can move into during an exam or consult. Click OK. Repeat these steps for each status option the patient can move into. Click save when you have them all created.
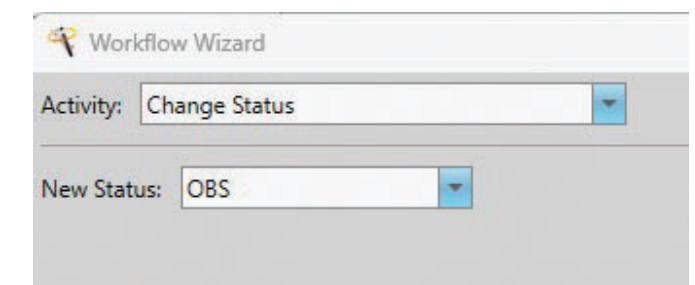

Next, we need to create a dropdown list to use in the Treatment Hub. Still in the Editors, select Treatment Chart List. Under Create New List, type Next Status for your list name and click Add. Now that the list is created, we need to add our Next Status options to the list. In the bottom left corner of the screen, click on the Add button to add your first dropdown option. Type the Status name you want to select.

Pro Tip: Press Enter to speed up entry in this editor. Pressing Enter selects OK for you and then selects Add again after you add your first list item. You can add all your list items here without touching your mouse.
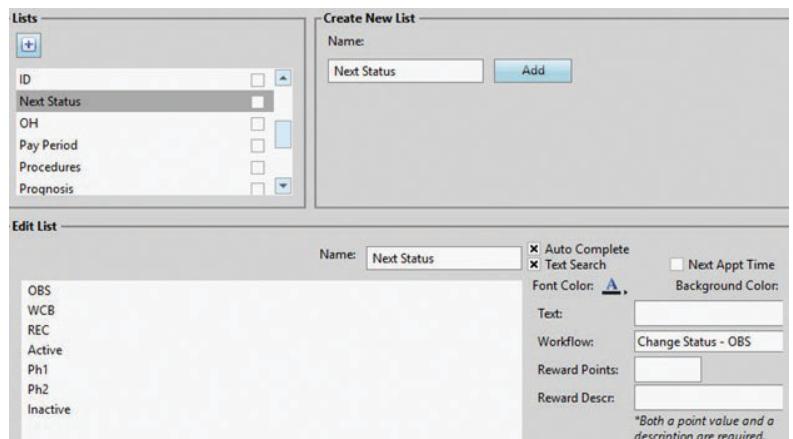
Once all the statuses are entered into the list, use the Up, Down, and Alpha buttons at the bottom to resort the list as needed. Now, attach the workflows created in the first step to each list item. Select the list item, click on the Workflow dropdown, and select the corresponding Workflow to attach it. Do this for each status. Click Save when you're done.

Now that our list is created, we need to update the Treatment Chart Style editor to add the column to attach our new list. Still in the Editors, select Treatment Chart List. Click on the Pre-Treatment Chart Style, New Column at the bottom, and name it Next Status. Click and drag that column to the location of the chart you want it in. Update the Font Size and Width to match your current style. Next, change the Col. Type to List Only, and select the List Next Status. Save it and you're ready to go!
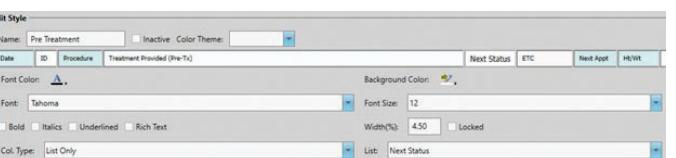
Using these same steps, you can create any list of workflow triggers you want. Another great example is to create a list of appliances to be sent out. This would automatically add the Appliance, Destination, Expected Weeks, and Office to the Appliance Tracker, saving you from having to manually enter this in the patient's Milestones tab. The only difference in the setup for this is in the Workflow editor.

Go to Editors > Workflows. Click New to create a new workflow and name it the name of the appliance you are sending out. To the right of the Workflow Name in the Activities section, click and drag Send Appliance from the middle list of Activities into the Workflow Activities section, and fill out the Activity Properties on the right. Be sure to fill in the Destination, Expected Weeks, Appliance, and Office. Repeat this process for each appliance you want in the treatment chart dropdown list. Then hit Save.

Once a workflow is created for each appliance, go to Editors > Treatment Chart List, and create a new list called Appliances. Add each appliance again to this list, then add your workflows to each list item, and click Save. Lastly, go to Editors > Treatment Chart Style, click New Column. Change the name of the column, move it, and update the size and width as needed. Change the Col. Type to List Only, and choose the list you made. If you have multiple treatment chart styles that need this column, be sure to add it to each style.

One thing to keep in mind, you can only fire off one workflow at a time from the dropdown list. This is why we need to set the Col. Type to List Only instead of List and Text. This means that you cannot add two appliances at the same time. If you needed a second appliance made, you have three options:

1. Create a second treatment chart entry for the patient.

2. If the appliances are going to the same lab, create a new appliance in the Appliance editor that is for multiple appliances.

3. Create a workflow and list item that creates two appliances. When making the workflow in the workflow editor, drag Send Appliance into the Activities section twice.

In the next newsletter, we will take this process a step further by adding visual tags to a patient through Workflows.
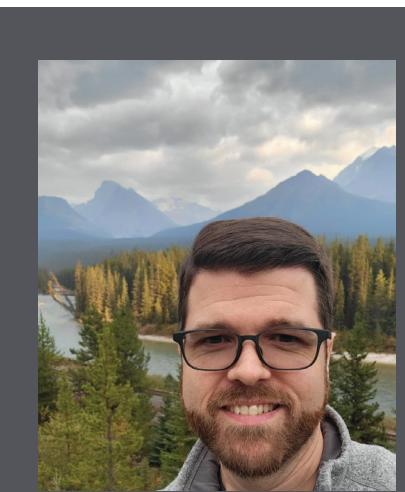
Derek Dohrman

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The Power of Group Coaching for Orthodontic Teams

Running an orthodontic practice often feels like a juggling act. Between patient care, insurance processing, schedules, and keeping your team motivated, it can sometimes feel like you're spinning plates while riding a unicycle. Doctors and office managers carry the weight of responsibility, and while 1:1 consulting can provide direction, it doesn't always give you the community or accountability you need to sustain change.

That's where group coaching comes in. In orthodontics, where efficiency, systems, and team culture drive growth, group coaching provides an environment where practice doctors and teams learn, share, and grow together. It transforms "you're on your own" into "we're in this together."

What is Group Coaching?

At its core, group coaching is a guided learning experience where multiple participants, often practice doctors, managers, or team members, come together with a coach to work toward shared goals. Unlike traditional 1:1 consulting, group coaching blends expert guidance with peer-to-peer collaboration.

In the orthodontic setting, this might look like doctors and coordinators from different practices joining a session to learn about marketing strategies, systems management, or patient communication, and then sharing how they've applied those lessons in real-time. The group dynamic makes learning more interactive, more practical, and often more motivating than working in isolation.

Instead of receiving information in a vacuum, participants hear a variety of perspectives, challenges, and wins that spark ideas and help them adapt proven strategies to their own practices.

The Power of Collaboration

One of the biggest challenges in running an orthodontic office is the sense that you have to figure everything out on your own. While every practice has its unique quirks, the reality is that many obstacles are shared across the industry, from filling morning appointments to managing insurance verification delays to keeping the front desk from burning out.

Group coaching turns those

Megan Wyrick and Brittani Wyrick

Founded by TWO sisters, Megan and Brittani Wyrick, The Wyrick Outlook is an orthodontic coaching agency specializing in remote orthodontic financials and insurance, digital courses, and private coaching. This dynamic has helped hundreds of practices achieve and sustain financial success across the orthodontic industry.

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How Smart Teams Turn Mistakes into Momentum

Every orthodontic team has been there. The front desk swears they sent the referral, the oral surgeon insists they never received it, and now a frustrated parent is standing at the counter, arms crossed and ready to share their disappointment online. In today's world, where patience runs thin and social media megaphones are always on, one small misstep can turn into a much louder moment than it deserves. But here's the good news: frustration isn't failure. It's feedback. And when handled well, it can be the best opportunity your practice ever gets to prove its character.

The way an orthodontic office responds to conflict has the power to define its reputation far more than any marketing campaign. While we often focus on perfecting the clinical experience, it's the communication and recovery moments that build trust, or break it. Every member of your team plays a role in shaping that patient story, and with the right mindset, even a one-star moment can transform into a five-star success.

Prevention begins long before a parent posts a review. It starts with proactive communication and systems designed to keep confusion from ever taking root. Misaligned expectations are the root cause of most patient frustration. When someone assumes their consultation will take twenty minutes, or expects to start treatment right after school, or discovers a surprise fee for records, it's not the situation itself that upsets them. It's the mismatch between what they thought would happen and what actually did. Clear expectations are the cure. Text before they ask. Call before they complain. Clarify before they're confused. These small, consistent habits prevent big problems later. A well-run practice doesn't rely on "fixing" issues. It relies on systems that stop them from happening in the first place. Shared inboxes, clear handoffs, and phrases like "Let me double-check that for you" can do more for your reputation than any PR strategy ever could.

Of course, even the best systems can't eliminate every spark of frustration. That's when it's time to neutralize. Reading the room is a skill that takes practice but pays off every single day. Frustration rarely starts with shouting. It begins with a clipped tone, a tight jaw, or a flurry of quick questions. These are your cues to shift gears and stay calm. The wrong phrases can add fuel to the fire. "That's not

Jill Allen

Jill Allen is an international orthodontic consultant dedicated to helping doctors achieve their dreams. Her core strengths lie in guiding orthodontists through practice start-ups, acquisitions, comprehensive team training, and supporting practitioners at every stage of their orthodontic careers. With a proven track record of success and a dedicated team of professionals, Jill has been in the orthodontic industry for more than 30 years and has amassed vast knowledge and expertise, making her a trusted leader in the orthodontic field.

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Future-Proofing Your Orthodontic Practice in 2026: Proven Strategies to Drive Growth, Efficiency, and Patient Engagement

Running a thriving orthodontic practice in 2026 looks very different than it did just a few years ago. Rising overhead costs, evolving patient expectations, digital-first workflows, and rapidly advancing technology have created both challenges and opportunities for practice owners.

The good news? Practices that are adopting smarter systems, leveraging patient-focused technology, and staying ahead of industry trends are seeing measurable growth—even in an uncertain economic landscape.

In this article, we'll explore the six most critical focus areas for orthodontic practice owners today and how embracing new and updated strategies can help you streamline operations, boost patient satisfaction, and maximize profitability.

1. Leverage Technology to Drive Practice Growth

Technology is no longer optional; it's the foundation for efficiency and scalability in orthodontics. Today's most successful practices are investing in integrated, digital-first systems that allow them to manage everything from scheduling to treatment planning in one place.

Key Benefits of Embracing Digital Tools

- **Improved Team Efficiency –** Streamline administrative workflows and reduce redundancies that waste valuable chair time.

- **Enhanced Patient Engagement –** Tools like online scheduling, text review requests, and patient portals decrease no-show rates and increase satisfaction.

- **Better Data-Driven Decisions –** Advanced reporting and dashboards provide real-time insights into production, case acceptance, and overall health and performance of the business.

Practices using automated tools for tasks like claims submission are reporting clean claim rates as high as 99%, leading to faster collections and improved cash flow.

2. Increase Case Acceptance and Treatment Efficiency

In 2024, the average orthodontic case acceptance rate hovered around 64.4% and treatment efficiency rates were much lower than optimal with a huge opportunity for improvement and financial gain. That gap represents one of the biggest opportunities for growth.

Patients often leave consultations excited, but follow-through declines when they face unclear financing options, confusing treatment plans, or a lack of follow-up.

Strategies to Close the Gap

- **Enhance Consult Presentations –** Use visuals, before-and-after imagery, and animations to simplify explanations and build confidence in your recommendations.

- **Streamline Financial Discussions –** Tools like payment sliders and flexible financing options make treatment decisions less intimidating; patients can have more interaction in this process.

- **Automate Follow-Ups –** Implement email and text reminders to re-engage hesitant patients and ensure consistent touchpoints with your TC's ability to influence the patient's decisions.

When your treatment coordinator pairs these tools with a structured process, you not only increase starts but also improve treatment efficiency rates through higher patient involvement and compliance.

3. Optimize Operational Workflows to Reduce Bottlenecks

For many orthodontic practice owners, scheduling inefficiencies and operational bottlenecks are among the biggest daily challenges. These disruptions not only frustrate patients and team members but also limit production and profitability.

Research shows that optimizing scheduling and patient flow can reduce wait times by up to 40% and allow practices to see three to four additional patients per day—without hiring extra team members.

Strategies for Streamlining Operations

- **Use Real-Time Dashboards –** Monitor KPIs such as production, starts, collections, and cancellations in one place to make quicker, smarter decisions. Ensure your team understands these reports.

- **Refine Scheduling Templates –** Adjust time blocks based on appointment type, provider needs, and patient flow patterns to increase chair utilization.

- **Improve Team Communication –** Implement task management systems or color-coded workflows to ensure the entire team knows priorities and next steps.

When everyone operates with clarity and accountability, operational friction decreases—and patient experience improves.

4. Modernize Your Marketing to Attract and Retain More Patients

Today's patients—especially Gen Z and younger millennials—are making orthodontic decisions based on online visibility, reviews, and digital convenience. Practices that haven't evolved their marketing strategies risk falling behind.

Key Marketing Strategies for 2026

- **Optimize Your Google Business Profile –** Over 70% of new patients begin their search for an orthodontist online. Keeping your profile updated with photos, FAQs, and patient reviews helps you rank higher and convert more leads.

- **Leverage Social Media for Storytelling –** Short-form video platforms like Instagram Reels and TikTok are powerful for showcasing smile transformations and highlighting your team's personality and practice culture.

- **Automate Review Requests –** Sending personalized review invitations after key milestones, like debonding appointments, builds social proof organically.

- **Create Engaging Video Content –** Educational clips explaining braces, aligners, or retainer care establish your authority and strengthen patient trust.

By pairing these strategies with modern digital tools, you create a frictionless experience that patients expect—and competitors may not yet provide.

Michelle Shimmin

Michelle Shimmin is an international lecturer, trainer, and consultant who has been in the field of orthodontics since 1990, working as a Registered Dental Assistant, teaching orthodontic assisting, marketing, financials, treatment coordinating, and practice management. Michelle travels the country and helps transform orthodontic offices on their systems to promote training, growth, and success through a comprehensive practice approach.

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my department" or "You'll have to call them" have never cooled anyone down. Instead, use bridge-building language: "Let's fix this together," "I completely understand why that's frustrating," or "Thank you for your patience. I'm on it." These responses show ownership and empathy, which instantly lowers the temperature in the room. Remember, culture plays a big part here, too. Teams who feel supported and respected tend to respond to stress the same way, with patience, professionalism, and care. Culture isn't defined by what's written in your employee handbook; it's revealed by how your team reacts when the day gets difficult.

When all else fails, the recovery matters most. Mistakes happen. Emails get lost, calls get missed, and people forget. But the way your team responds in those moments speaks louder than any apology. Patients don't leave because something went wrong; they leave because no one made it right. The formula for recovery is simple but powerful: own it, fix it, follow up. "We dropped the ball. Here's what we're doing now. Just wanted to make sure we got it right." Those three sentences can turn frustration into forgiveness. Add a small, personal gesture like a handwritten note, a coffee gift card, or even a quick call from the doctor, and suddenly a negative experience becomes the story that the patient tells their friends. The best practices don't stumble into recovery by luck; they build it into their systems. Document what happened, flag the patient for follow-up, and make sure every department knows how to participate in the fix.

A "wow budget" helps too. Set aside a little money for your team to use at their discretion to make things right in memorable ways. The gesture matters less than the effort. What counts is that your team showed they cared when it would've been easier not to.

> **When all else fails, the recovery matters most…But the way your team responds in those moments speaks louder than any apology.**

Patient frustration often runs deeper than what you hear in the moment. The visible complaint, the missed appointment, the lost email, the miscommunication, is just the tip of the iceberg. Underneath it might be anxiety about cost, confusion about the process, or a bad experience at another office. Responding with empathy gives you a chance to steer around what's really causing the reaction instead of crashing straight into it. The best teams aren't perfect; they're consistent, kind, and composed even when the patient isn't.

If you think about your most loyal patients, the ones who refer their friends, write glowing reviews, and bring in their kids later on, chances are something went wrong for them once too. But you handled it with grace, and that moment turned them from a patient into an advocate. That's the real power of recovery. It doesn't just fix the problem; it deepens the relationship. Frustration, when handled well, shows your practice's values in action. It proves that your culture isn't just something you talk about, it's something you live.

Every complaint, every tense moment, every one-star review waiting to happen is really an invitation to improve. Frustration reveals where your systems are weak, where your communication could be stronger, and what your patients truly value. When you take the time to prevent problems through clear expectations, neutralize tension with empathy, and recover with integrity, you build something far more meaningful than a smooth day.

Orthodontics isn't only about straightening teeth. It's about creating calm in moments of chaos and showing people they matter, especially when things go wrong. Perfection isn't the goal; connection is. And when you can turn frustration into loyalty, every challenge becomes another chance to earn your five stars. ✪

Retraining

Have you hired new staff since your original software training? Have you had staff members take on new responsibilities? Do you feel you might not be taking advantage of the enhancements that have been added over the years?

Ortho2 offers many options for refreshing your knowledge of old features and informing you of new features, but do you want to be able to set your own agenda to meet the specific needs of your practice?

A retraining — either in your office or over the Internet — addresses all these issues. To learn more and to schedule one for your practice, contact your Ortho2 Regional Manager today at 800.678.4644 or sales@ortho2.com.
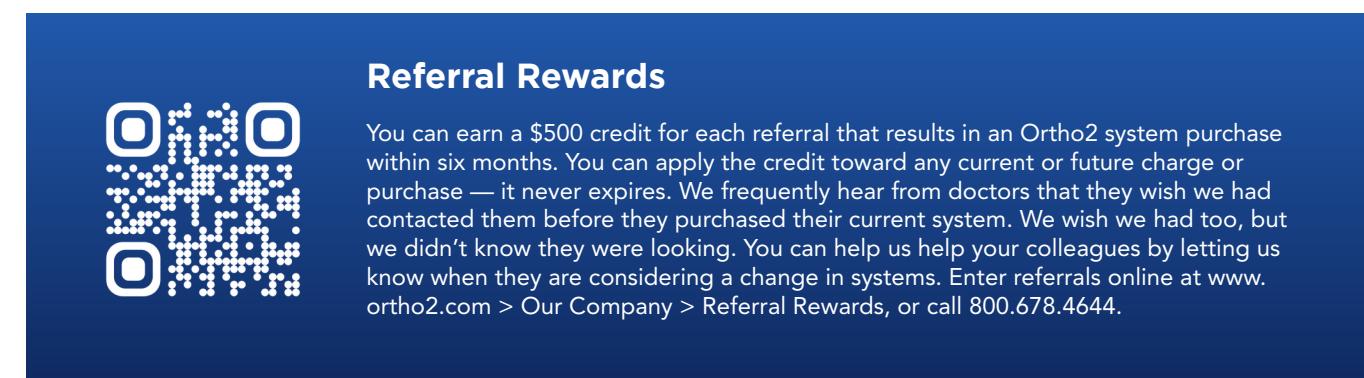
Referral Rewards

You can earn a $500 credit for each referral that results in an Ortho2 system purchase within six months. You can apply the credit toward any current or future charge or purchase — it never expires. We frequently hear from doctors that they wish we had contacted them before they purchased their current system. We wish we had too, but we didn't know they were looking. You can help us help your colleagues by letting us know when they are considering a change in systems. Enter referrals online at www.ortho2.com > Our Company > Referral Rewards, or call 800.678.4644.

Contact Support

By Phone: 800.346.4504

By Email: ortho2support@ortho2.com

And Don't Forget Our Website: support.ortho2.com

Available 7:00 A.M. – 7:00 P.M. Central Time, Monday – Friday

Response time is usually the same day or at most within 24 hours.

Our website gives you 24/7 access to our knowledge base, FAQs, white papers, visual help videos, and more.

Congratulations!

Please join us in celebrating Kay Duran, Ortho2 Software Support Representative, and Victoria on their wedding. The couple was married October 10, 2025. We're thrilled for Kay and Victoria and wish them a lifetime of love and happiness!

Help Us Help You

Please be prepared to provide your customer number, practice name, and office location when you call our support teams for assistance. You can find your customer number in Edge Cloud by clicking File > About. If you use ViewPoint, you will find your customer number by clicking the Help menu and choosing About. Please be sure to provide this information—and repeat your phone number—when leaving a phone message requesting support.

Service Excellence

We invite you to recognize Ortho2 employees by submitting an Extra Mile form. The form is available online from the Contact Us page of our website. Our goal is to uphold our tradition of excellence in customer service, and with our Extra Mile program, you can let our employees know when you appreciate their extra effort. We encourage you to submit an Extra Mile form whenever an Ortho2 employee goes the extra mile for you. The recognition is valued by the recipient and is acknowledged by our management team. We continue to look for better ways to serve you. Thank you for helping us recognize excellence.

shared struggles into opportunities for growth. By bringing together practices facing similar challenges, participants benefit from solutions that are already being tested in the field. Instead of reinventing the wheel, you get to learn what's actually working in other offices and adapt it to fit your own.

Collaboration also inspires innovation. A scheduling hack from one practice may spark an entirely new approach for another. Hearing how a peer handles marketing, patient follow-ups, or team motivation can open doors you might never have considered on your own.

Most importantly, collaboration builds community. Running a practice can feel isolating, especially for leaders. Group coaching reminds you that you're not alone; you're part of a larger network of professionals moving through the same challenges and celebrating the same wins.

Built-In Accountability

Another powerful benefit of group coaching is accountability. It's one thing to set goals for yourself or your practice; it's another to know that you'll be sharing your progress with peers who are walking alongside you.

This built-in accountability creates momentum. When you know others are checking in, you're more likely to follow through. That "friendly pressure" transforms intentions into action.

Instead of a binder of notes collecting dust, you start implementing changes in real time.

Accountability also provides encouragement. When teams hear peers share their progress – whether it's hitting referral targets, improving case acceptance, or streamlining insurance workflows – it builds motivation. Wins feel contagious in a group setting, and challenges feel more manageable when you see others working through them too.

Tangible Benefits for Ortho Teams

So, what does all of this collaboration and accountability translate to for orthodontic practices? The benefits are real and measurable:

- **Efficiency –** Instead of trial and error, you tap into a collective pool of proven strategies that shorten your learning curve.

- **Confidence –** Practice leaders and team members gain validation that they're on the right track — or guidance on how to adjust when they're not.

- **Motivation –** Teams feel inspired seeing what's possible when others share wins, big or small.

- **Scalability –** Solutions discussed in group settings often apply across single-location practices and multi-

office groups, making them easy to adapt as you grow.

- **Resilience –** With a community of peers, challenges feel less overwhelming, and support feels more accessible.

Why Group Coaching Works in Orthodontics

Orthodontics is both a people business and a systems business. The best results come from practices that balance strong workflows with strong culture. Group coaching feeds both sides: it sharpens systems by exposing you to proven processes, and it strengthens culture by reminding teams they're not alone in the journey.

For practice doctors and teams who want more than just information – who want collaboration, accountability, and a community that drives growth – group coaching offers a unique and powerful solution.

Running an orthodontic practice will always come with challenges, but you don't have to face them in isolation. Group coaching offers something 1:1 consulting often can't: the combination of expert guidance, collaborative problem-solving, and built-in accountability that fuels real change. The practices that thrive aren't just working harder; they're working smarter, together. And that's the power of group coaching. ↻

5. **Make Data-Driven Financial Decisions**

    With rising staffing costs, economic uncertainty, and shifting patient behaviors, financial oversight has never been more important. Orthodontic practices that track the right metrics consistently can pivot faster and stay ahead of challenges.

Key Metrics to Track

*   **Case Acceptance vs. Starts –** Analyze where prospective patients drop off to improve conversion strategies.

*   **Accounts Receivable and Collection Rates –** Automated billing and insurance workflows reduce AR days and improve cash flow.

*   **Chair Utilization –** Measure how effectively each appointment block is being used to maximize capacity.

*   **Marketing ROI –** Evaluate cost per lead and cost per start to ensure your investments are driving growth.

The practices thriving in 2026 are those relying less on gut instinct and more on data visibility to drive decisions.

6. **Invest in Team Development and Culture**

    While systems and technology play a significant role in practice success, your team remains your greatest asset. In today's competitive hiring market, retaining top talent requires a strong focus on culture, recognition, and professional growth.

Ways to Build a High-Performance Team

*   **Role-Specific Training –** Equip treatment coordinators, office managers, and clinical staff with targeted skills training that enhances performance in their lanes. Don't just 'fill seats' of need within your practice. Ensure you have the right people in the right role to maximize their strengths and minimize their weaknesses.

*   **Clear Accountability Metrics –** Transparent reporting empowers team members to see their direct impact on production, collections, and patient outcomes.

*   **Celebrate Wins –** Recognize team achievements regularly, whether that's meeting monthly production goals, earning five-star reviews, or hitting start targets.

*   **Invest in Ongoing Education –** Encourage your team to attend workshops, webinars, and conferences to stay current on industry innovations.

When your team feels supported, valued, and connected to the practice vision, productivity, morale, and patient satisfaction all improve.

Orthodontic practices that embrace digital transformation, streamlined workflows, and patient-centered strategies are positioning themselves for long-term success.

The key is finding ways to:

*   Simplify processes for your team

*   Reduce friction for patients

*   Align marketing, operations, and financial management under a unified strategy

In a competitive orthodontic landscape, the practices that thrive won't necessarily be the ones working harder—they'll be the ones working smarter.

The orthodontic industry is evolving rapidly, but with the right systems, strategies, and focus, practice owners can create scalable, profitable, and patient-centered businesses that succeed regardless of market conditions. By investing in technology, data visibility, marketing innovation, and team development, you can set your practice apart while future-proofing your growth.

The future of orthodontics isn't about doing more—it's about doing things differently. Start by evaluating your workflows, aligning your team on shared goals, and adopting tools that help you deliver an exceptional patient experience. Your growth, profitability, and long-term success depend on it. ✪

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.

Celebrating Ortho2 Anniversaries

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

Thirty-Three Years
Todd Schuelka

Thirty-One Years
Michele Eich

Twenty-Seven Years
Lowell Davis
Denise Sargent
Jennifer Shaffer

Twenty-One Years
Corey Schmidt

Twenty Years
Derek Dohrman

Thirteen Years
Drew Humphrey

Twelve Years
Steve Volcko

Four Years
Zach Benjamin

Three Years
Mikayla Morrison
Alex Richardson

Two Years
Ashley Hurt
Ben Lievens
Ana Lopez

One Year
Eduard Babayan
Brittany Heacock

Congratulations!

Congratulations to Jennifer Shaffer, Ortho2 Web Development Coordinator, and her team for winning the 3.5 Division of the Des Moines Pickleball Team Classic Tournament. The tournament was a fundraiser for Blank Children's Hospital in Des Moines. Well done, Jennifer!

ORTHO2
EMPOWERING PRACTICES

Newsletter

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