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START UP CHECK LIST

- Design new logo for stationery, website and all social media. (6 months to 1 year prior)
- Select CPA/Tax Attorney for advice on corporation set up (S Corp/LLC), secure name.
- Acquire Bank/Lender.
- Secure location: Define build-out/design, set timeline for move.
- Insurance: Health, Malpractice, Disability, Liability.
- Insurance: Building and contents.
- Choose orthodontic software Practice Management System—Set up ASAP.
- Set up Website/Social Media with final address/phone/email when established and all written or printed products.
- Establish insurance carriers for billing: Federal ID Number.
- Review and set budget: Establish new start and financial goals.
- Memberships (professional, service clubs, etc.), AAO directory, notify state dental board.
- New referral pads: Send with cover letter to potential referrers. Mail by:_____.
- Discuss staffing needs. Interview and hire: Minimum 1 Scheduling Coordinator/TC and 1 Clinical.
- Determine internal marketing. (t-shirts, pens, rewards and referral programs, contests, etc.)
- Add new sign for the office building.
- Set up telephone, utility and essential vendors.

- Establish a file system to track all equipment, products, warranties as delivered.
Tip: Always check prices promised.
- Draft new patient letters, script telephone greeting and on-hold message.
- Create initial announcement letter (with doctor photo and bio) to your dental community.
Email or mail by:_____.
- Determine feeders in area. Begin taking New Patient phone calls 1-3 months prior to move.
- Establish a schedule rotation if possible.
- Direct mail campaigns to local residential areas announcing that you are opening your practice.
Newspaper announcement (in color) - run on Sunday. In addition, you need a social media presence, such as a Facebook page just for your practice, along with perhaps Instagram, Twitter, et all. Consider paid social media ads.
- OSHA: Files for manuals, procedures, SDS, secondary labels and office policy update.
- Frame, mat and hang doctor's diploma in conference room.
- Doctor reception/open house (invitation list composed of potential future networks.)
Date of open house:_____.
- Marketing plans to RDH's, schedule doctor luncheons, and lunch & learns.
- Select daily uniform or image, add your logo.

