



## Expert Panel Series: THE FUTURE OF ORTHODONTICS

### Homework and Final Thoughts

#### **Oliver Gelles – OrthoFi**

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1. Take a measured approach to staffing and operating expenses to plan for the lower end.
2. Focus your marketing, messaging, and outreach on addressing financial and safety concerns.
3. Offer open-choice flexibility with payment plans.
4. Play offense – invest in patient acquisition tools.

#### **LeeAnn Peniche – Peniche & Associates**

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1. Reschedule new patient exams.
2. Reschedule the observation patients.
3. Create a de-band plan.
4. Schedule “Like things at like times”
5. Stay visible.
6. Be a good neighbor.

#### **Mike Terrill – American Orthodontics**

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1. Clean up your inventory.
2. Project your product needs for 6 months.
3. Work with an advisor to project cash flow needs
4. Make payment/order size arrangements with suppliers if necessary.
5. Use your suppliers to help build patient confidence.

#### **Hunter Satterfield - CWA**

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1. Don't stress on the PPP forgiveness application yet. Focus on running your business.
2. Don't let PPP forgiveness drive your decision making.
3. Create or update a cashflow model for the next 6-9 months.
4. Stay current on all things financial on the [CWA resource page](#) and sign up for their newsletter.

#### **Brett Pierce - ELITE**

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1. Don't let this uptick get you comfortable.
2. Be proactive on the marketing side and win patients.
3. Somebody will win in this situation, make it you.
4. Watch all episodes in the series on the [ELITE resource page](#)
5. Utilize the resources available to you ([ELITE](#), [CWA](#), [OrthoFi](#), [AO](#), [Peniche](#)).

*ELITE has special arrangements with each of these fantastic companies. Reach out to your member advocate today and get connected.*