

# PRACTICE GROWTH ESSENTIALS:

Modern Moves for Long-Term Success



© JRA Healthcare Real Estate & Practice Advisory

# INTRODUCTION

Running a thriving dental practice takes more than great dentistry – it requires smart systems, modern tools, and proactive planning. Use this two-page checklist to evaluate your operations, set growth priorities, and prepare your practice for long-term success.

*Quick Tip: Focus on progress, not perfection. Consistent small improvements build lasting value.*

# PRACTICE PERFORMANCE & PATIENT EXPERIENCE

Strong systems and a patient-first mindset drive growth, retention, and satisfaction.

## Patient Touchpoints

- I've reviewed our patient journey from appointment to post-visit.
- I'm sending reminders and post-treatment check-ins.
- I offer same-day dentistry when appropriate.
- My schedule runs efficiently and on time.

## Treatment Presentation

- I have a consistent process for presenting treatment plans.
- I use visuals and simple language to explain outcomes.
- I discuss financing and timing options clearly.
- My entire team reinforces consistent messaging.

## Customer Experience & Technology

- Patients can schedule online and communicate via text or video.
- Our systems are fast, secure, and HIPAA-compliant.
- Our website is modern, mobile-friendly, and easy to navigate.
- I evaluate our tech annually for ROI and patient impact.

# GROWTH STRATEGY, TEAM & TRANSITION PLANNING

Your practice's future depends on your space, people, and preparation.

## Real Estate & Facility

- I've confirmed our location supports long-term goals.
- I'm aware of lease renewal dates 12-18 months out.
- I understand the trade-offs between owning vs. leasing.
- I'm keeping interiors and equipment current without overspending.

## Timeline & Transitions

- I've mapped my 3-5 year transition or retirement plan.
- I know typical sale timelines (4-8 months) and readiness factors.
- I review hygiene capacity, financials, and staffing yearly.

## Team & Associates

- I've assessed whether my schedule can support an associate.
- I've created onboarding and performance goals.
- I'm tracking ROI and retention from associate performance.
- I'm documenting partnership or buy-in options.

## Advisory Network

- I work with a dental attorney, CPA, and lender familiar with the field.
- I have a real estate broker for lease and purchase guidance.
- I'm connected with a transitions broker for valuations and sales.



Surround yourself with trusted experts, they'll help you protect value and plan smarter.

# ACTION SUMMARY

## Top 3 Priorities for the Next 90 Days:

1	2	3

## Progress Tracker:

- Reviewed patient communication and presentation flow
- Completed technology audit
- Evaluated space and renewal strategy
- Mapped 3-5 year transition plan
- Built or updated advisory team

## ABOUT JRA

JRA helps dental professionals plan, grow, and transition with confidence through site selection, lease renewals, start-ups, expansions, relocations, and acquisitions.

