



ORTHODONTIC
EXPERTS

2021
Marketing
Manual

ORTHODONTIC EXPERTS

Table of Contents

The page features decorative blue brushstrokes in the corners. A large, dark blue stroke is in the top-left corner. A medium blue stroke is in the top-right corner. A light blue stroke is in the bottom-left corner. A dark blue stroke is in the bottom-right corner.

Local Clinic Start-Up Plan



Grand Opening Package

 Grand Opening Banner

 3 Yard Signs

 3 Outdoor Flags

OUTREACH TABLE

 1 Folding Table (Marketing)

 OE Table Cover (Marketing)

 Snacks (Quill)

 Promotional Items (Advanced Online Store refer to page...)

 Before & After Books (Marketing)

 Refer a Friend Postcards (Advanced Online Store)

 Balloons (Blue, Yellow & White from Party City or Dollar Store)

X
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BRANDED SIDEWALK SIGN

Smartsigns.com



As your clinic opens during the grand opening celebration, the marketing department will provide 1 sidewalk sign to display outside your front entrance. Signs: [1] Walk-In's Welcome, [1] Free Invisalign Scans, [1] Payments Plans For Every Budget

The sidewalk sign will be displayed everyday from open to close. Do not leave the sign outside overnight. Marketing will handle all the permits and applications for the Village Hall.

*** SOME ITEMS VARY AS VILLAGES MIGHT NOT ALLOW**

GRAND OPENING BANNER

Buildasign.com



As you get closer to the opening of your clinic, please have this banner displayed on the outside of the building at the entrance.[Usually installed by the building contractor and project manager.] The banner will be displayed for 30-60 days from the start of the clinic's opening.

Marketing will handle all the permits and applications for the Village Hall.

*** SOME ITEMS VARY AS VILLAGES MIGHT NOT ALLOW**

YARD SIGNS

Vistaprint.com



As your clinic opens during the grand opening celebration, marketing will provide [3] yard signs to put out on the lawn.

Sign Types: [1] Now Open, [1] Payment Plans for Any Budget, and [1] Invisalign.

Marketing will handle all the permits and applications for the Village Hall. Should you have any issues with the yard signs, please reach out to the marketing coordinator.

*** SOME ITEMS VARY AS VILLAGES MIGHT NOT ALLOW**

FLAGS

Vistaprint.com



As your clinic opens during the grand opening celebration, the marketing department will provide [3] flags to put out on the lawn.

Flag Types: [1] Grand Opening, [1] Braces, and [1] Invisalign.

Place them in the ground to be displayed everyday from open to close. Do not leave the flags outside overnight. and leave outside overnight.

Marketing will handle all the permits and applications for the Village Hall, so you can have the flags available.

Should you have any issues with the flags, please reach out to the marketing coordinator.

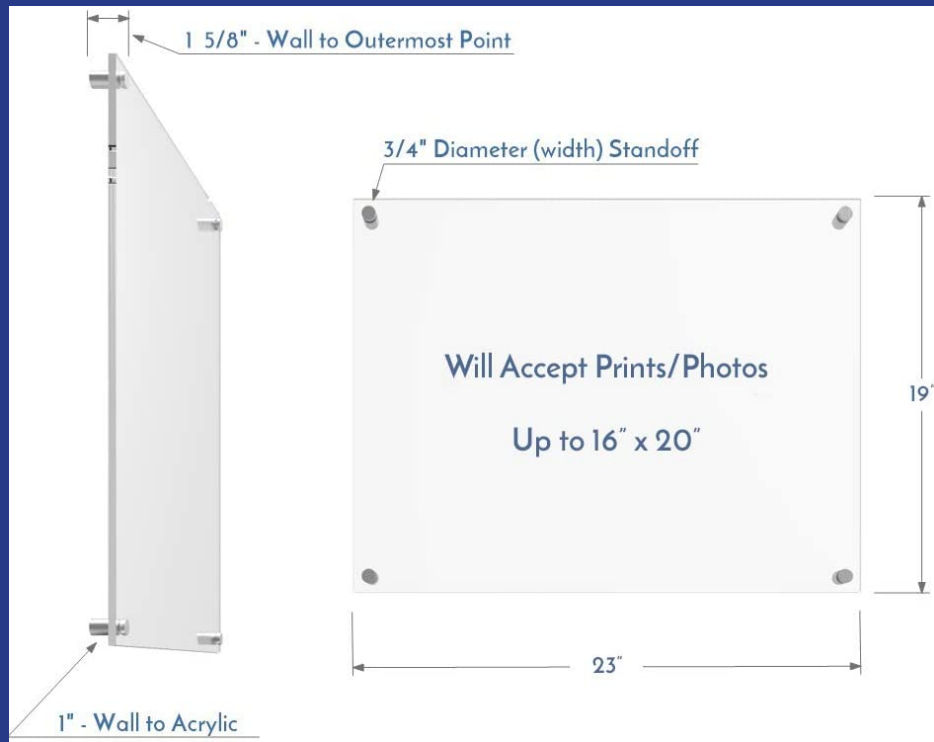
*** SOME ITEMS VARY AS VILLAGES MIGHT NOT ALLOW**

Posters & Signs



CLINIC FRAMES

Amazon.com



Order Frames 1-2 months beforehand

Set time to peel frames

Coordinate with Project Management so they can give a floor plan to sketch out frame destinations and install them.

Week of opening, set a day to go to clinic and organize all marketing materials and insert posters.

FRONT DESK

The Huddle and Mission Statement Sign can be found by clicking on this link:

<https://drive.google.com/drive/folders/1tS13zB3ZPlyXRbVyGhqLSsXcIANcazle>

The locations of each poster might be changed based on the marketing department. Any questions please reach out to the marketing coordinator.



PRIVATE ROOM

Include both English and Spanish version



ONLY \$99

ORTHO ESSENTIALS SYSTEM

Crest + Oral-B

ORTHODONTIC EXPERTS

This advertisement features a collection of dental hygiene products including Crest toothpaste, Crest Whitening Strips, Crest Whitening Mouthwash, and an Oral-B electric toothbrush with its charging station and travel kit. The items are displayed against a blue background with a yellow border. A yellow starburst in the top left corner highlights the price 'ONLY \$99'. The Crest and Oral-B logos are prominently displayed at the bottom, along with the 'ORTHODONTIC EXPERTS' logo.



GET THAT DREAM SMILE!

IT'S YOUR TURN, PARENTS!

\$500 OFF INVISALIGN FOR PARENTS

ORTHODONTIC EXPERTS

Invisalign PROVIDES

This advertisement uses a collage of smiling families in circular frames to promote Invisalign for parents. The text 'GET THAT DREAM SMILE!' is in the top left, 'IT'S YOUR TURN, PARENTS!' is in a central yellow circle, and '\$500 OFF INVISALIGN FOR PARENTS' is in a blue circle on the right. The bottom features the 'ORTHODONTIC EXPERTS' logo and the 'Invisalign PROVIDES' logo.



When it comes to your smile, predictability is good.

Get your Invisalign smile with the power of Invisalign's SmartTrack technology. It's the only clear aligner technology that's been clinically proven to deliver the most predictable results.

Invisalign | CLEAR ALIGNERS

www.invisalign.com

This advertisement features a close-up, artistic shot of a clear Invisalign aligner against a dark background. The text 'When it comes to your smile, predictability is good.' is centered. Below it, a small blue dot is followed by the text 'Get your Invisalign smile with the power of Invisalign's SmartTrack technology. It's the only clear aligner technology that's been clinically proven to deliver the most predictable results.' The Invisalign logo and website are at the bottom.

PA ROOM

Include both English and Spanish version



ORTHODONTIC EXPERTS

Didn't Get Approved?

Don't Worry. We can help!

- Special Pricing Available
- Payments That Fit Your Budget



ORTHODONTIC EXPERTS

WHY AGE 7 IS THE RIGHT TIME TO VISIT AN ORTHODONTIST

Do you recognize any of the following signs?

- Difficulty in chewing or biting
- Jaws that shift or make sounds
- Thumb or finger sucking
- Biting the cheek or the roof of the mouth
- Mouth breathing
- Speech difficulties
- Facial imbalance
- Grinding or clenching of the teeth

If so, it's time for your first consultation!

HALLWAY



AAC
American
Association of
Orthodontists

**RECOMMENDS FIRST
ORTHODONTIC CHECK-UP
BY THE AGE OF 7**



DID YOU KNOW?

**YOU CAN SEE YOUR NEW SMILE
BEFORE YOU BEGIN!**

WITH OUR iTero element. SCANNER

ICONIX
AESTHETIC BRACES

AO
AMERICAN
ORTHODONTICS



ICONIX
AESTHETIC BRACES

AO
AMERICAN
ORTHODONTICS



WAITING AREA & BAY AREA

The locations of each poster might be changed based on the marketing department. Any questions please reach out to the marketing coordinator.



BRUSHING REMINDER SIGN



Use this link to print this Brushing Sign

<https://drive.google.com/drive/folders/1tS13zB3ZPlyXRbVyGhqLSsXclANcazle>

New Clinic Inventory Chart

		Items	Quantity	Source
<input type="checkbox"/>		Appointment Cards	500	Vista
<input type="checkbox"/>	6-48-4P6016	Community Postcard "	500	Advanced Online
<input type="checkbox"/>	8-24-4P1002	#10 Envelope " 500/lot	1	Advanced Online
<input type="checkbox"/>	8-24-4P1003	Orthodontic Experts Letterhead " 1000/lot	1	Advanced Online
<input type="checkbox"/>	8-24-4P1005	A6 Generic Thank You Card/Personalized Envelope "	250	Advanced Online
<input type="checkbox"/>	8-24-4P1006	Orthodontic Experts 4 x 6 Notepads, 50 Sheets/pad "	250	Advanced Online
<input type="checkbox"/>	6-36-4P6059	Certificate "	250	Advanced Online
<input type="checkbox"/>	6-49-4P6014	Be Kind To Your Braces 3.5 x 5 Magnet "	350	Advanced Online
<input type="checkbox"/>	6-26-4P3500	Orthodontic Experts 9 x 12 Pocket Folder 25/pkg "	3	Advanced Online
<input type="checkbox"/>	6-36-4P6018	Refer A Friend English/Spanish 5 x 7 Postcard "	1000	Advanced Online
<input type="checkbox"/>	6-55-4P1462A	Metal Water Bottle "	100	Advanced Online
<input type="checkbox"/>	6-55-4P047B	Blue and White Click Pen "	150	Advanced Online
<input type="checkbox"/>		Pencils	75	Advanced Online
<input type="checkbox"/>	6-55-4P013M	Peppermint Scent Lip Balm "	200	Advanced Online
<input type="checkbox"/>		Drawstring Bags	150	Advanced Online
<input type="checkbox"/>		Tote Bags	300	Advanced Online
<input type="checkbox"/>	6-55-4P24H8	Royal Small Sports Pack "	350	Advanced Online
<input type="checkbox"/>	6-36-4P6032	Birthday Card "	250	Advanced Online
<input type="checkbox"/>		All Kids Postcard	100	Advanced Online
<input type="checkbox"/>		T-shirts - Black, small	35	Advanced Online
<input type="checkbox"/>		T-shirts - Black Med	40	Advanced Online
<input type="checkbox"/>		T-shirts - Blk Large	35	Advanced Online
<input type="checkbox"/>		T-shirts - Black XL	20	Advanced Online
<input type="checkbox"/>		T-shirts - Blue Small	7	Advanced Online
<input type="checkbox"/>		T-shirts - Blue Med	9	Advanced Online
<input type="checkbox"/>		T-shirts - Blue Large	10	Advanced Online
<input type="checkbox"/>		Cyber Pink T Shirt 'Orthodontic Experts Stacked' S	18	Advanced Online
<input type="checkbox"/>	6-33-4P2TSV	Cyber Pink T Shirt 'Orthodontic Experts Stacked' M	18	Advanced Online
<input type="checkbox"/>	6-33-4P3TSV	Cyber Pink T Shirt 'Orthodontic Experts Stacked' L	12	Advanced Online
<input type="checkbox"/>	6-33-4P4TSV	Cyber Pink T Shirt 'Orthodontic Experts Stacked' XL	22	Advanced Online
<input type="checkbox"/>		TC Business Cards	500	Vistaprint
<input type="checkbox"/>		CM Business Cards	500	Vistaprint
<input type="checkbox"/>		OPS Business Cards	500	Vistaprint
<input type="checkbox"/>		Doctor Business Cards	500	Vistaprint
<input type="checkbox"/>		Flags (Braces, Invisalign, and Now Open) - 13' Flag - feather - with poles & ground spike	3	Vistaprint
<input type="checkbox"/>		TC Laminates	7 Pages (2 of each)	GDrive
<input type="checkbox"/>		TC Laminate Cases	2	Amazon
<input type="checkbox"/>		Before and After Books	2	Jerry Piaskowy
<input type="checkbox"/>		Rewards Hubs Flyer		
<input type="checkbox"/>		Clinic Poster Frames		Amazon
<input type="checkbox"/>		Clinic Posters		Jerry Piaskowy
<input type="checkbox"/>		BYOM Sign		
<input type="checkbox"/>		Mission Statement		
<input type="checkbox"/>		STOP, HR, 6 ft Posters	1 of each (eng and sp)	GDrive
<input type="checkbox"/>		Balloons, Toppers and Sticks	150	Amazon
<input type="checkbox"/>		Sunglasses		Discount Mugs
<input type="checkbox"/>		Grand Opening Banner (if village allows)		Buildasign.com
<input type="checkbox"/>				
<input type="checkbox"/>		Balloons etc (Grand Opening)		Party City
<input type="checkbox"/>		IDC Brochure & Business Cards		Canva (Ask Ben)
<input type="checkbox"/>		IDC Brochure & Business Card Holders		Canva (Ask Ben)
<input type="checkbox"/>		IDC QR Code Flyer		Canva (Ask Ben)

OE Signage



OUTDOOR OE SIGNAGE



Have you ever wondered how the OE sign outside of your clinic turns on and off? Well, here is a little quick guide to get you through the steps on how to set the timer for your clinics.

The yellow dial will indicate the current time, and the two small metal arrows attached to the dial will indicate the "on" and "off" commands for the timer. If you don't know where your signage timer is, it is likely close to your electrical panel.

To adjust your timer, first, make sure that the timer is set to the correct time according to Daylight Savings Time. You likely will have to carefully pull the dial towards you before it will turn. Once the timer is set to the correct time, make sure that the "on" dial is at 4:00pm, and the "off" dial is at 8:00am. The on and off dials can be moved after slightly unscrewing the attachment pieces.

Front Desk Packet



Front Desk Checklist

BUSINESS CARDS

- ☐ Front Desk
- ☐ Operations Manager
- ☐ Treatment Coordinator
- ☐ Clinic Manager
- ☐ Doctors

FRONT DESK SIGNS

- ☐ Payment Sign
- ☐ Wi-Fi Sign
- ☐ Huddle Sign
- ☐ Mission Statement
- ☐ OE Phrases

MISC. ITEMS

- ☐ Clinic Referral Pads
- ☐ Appointment Cards
- ☐ TV Slideshow
- ☐ Promo Items (Chapstick, Pens, Pencils, Magnets)
- ☐ Snack Bar Sign
- ☐ Rugs
- ☐ OE Screens/Screen Savers

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Front Desk Inventory Chart

Item	Where to Get the Items
Business Cards	Marketing Coordinator
Posters	Marketing Coordinator
TV- Slideshow	Marketing Coordinator
Promotional Items	Online Store
Snack Bar Sign	Marketing Coordinator
WIFI Sign	Project Manager
Huddle Sign	Marketing Coordinator
Referral Sources Instructions	Business Development
Referring Dentist Instructions	Business Development
Birthday Cards	Online Store
Rugs	Marketing Coordinator
Referral Pads	Business Development
Appointment Cards	Online Store

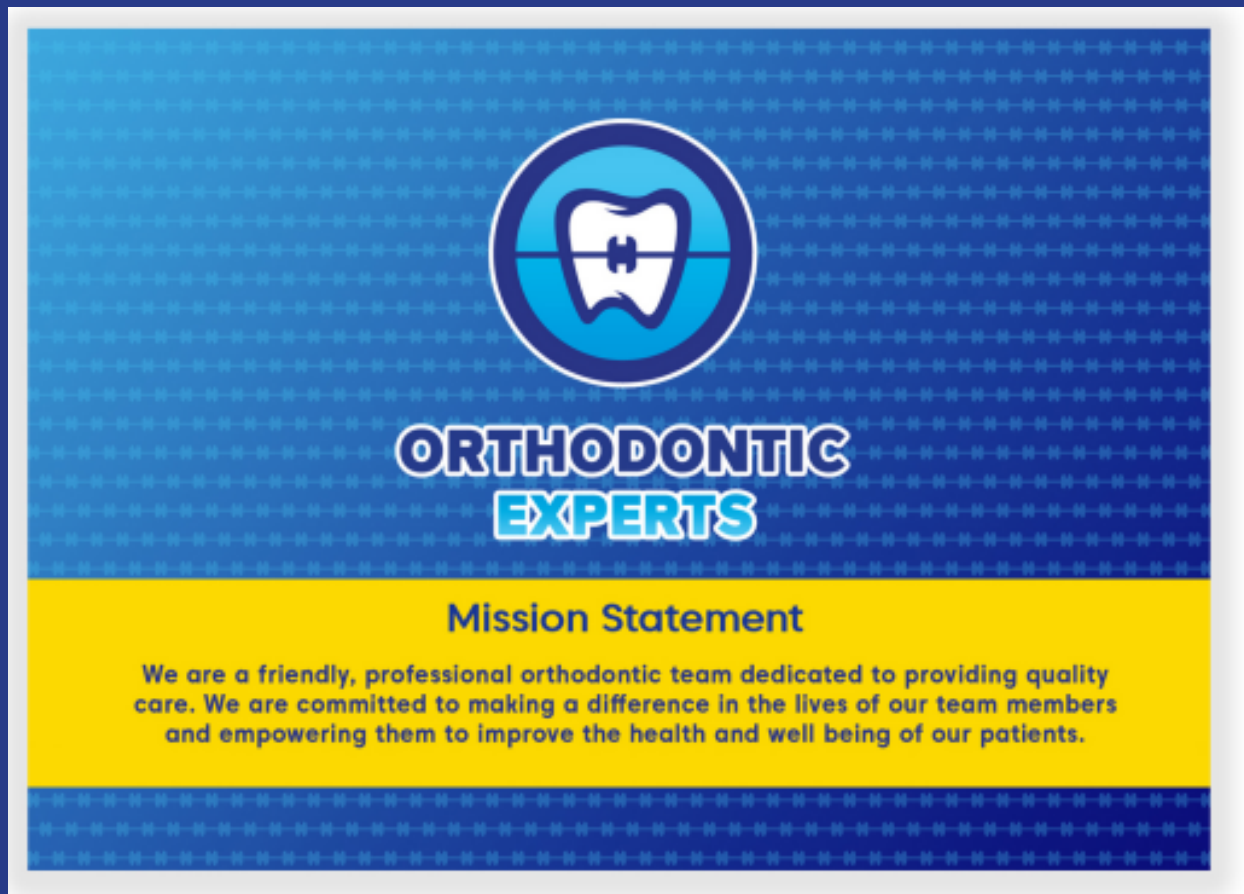
To order these items, please visit
www.orthodonticexpertsstore.com or contact the Marketing
Department

OE SCREENS & SCREEN SAVERS

We want to make sure that we embrace our new brand and mission statement for our patients and for Orthodontic Experts.

By clicking on the link below you will be directed to the instructions, logo, and mission statement to set up your computers.

https://drive.google.com/drive/folders/1EqkUjS7705cDaYYj0PPRDRak_vHv0aqV



TC Packet



TC Checklist

TC LAMINATES (IN ORDER)

- Cover Page
- Treatment Types
- Braces Vs. Invisalign
- Problems to Watch for Children Age 7
- Impacted Canine Resorption
- Poor Oral Hygiene
- Fixed Retainer
- Smile Protection

POSTERS

- Invisalign Plaque [Project Manager]
- Invisalign [Marketing]
- Oral B Special [Marketing]
- Your Turn Parents [Marketing]

MISC. ITEMS

- Before & After Book
- Treatment Case Binder
- Bonding/ Debonding Photos
- Photo Release Form (Open Dental)
- Thank You Cards [Must be sent out to patients after each consult]



TC LAMINATES INTRODUCTION

Each clinic is given a TC Laminate Flip Book that stands up on your desk, so when you're talking to a patient during a consultation you can show them the different laminates easier.

If you need to replace your TC Laminate Flip Book or any of your laminates for any reason, please reach out to the marketing coordinator.



Please do not re-print these on your own. Contact the Marketing Department.

As you see through the next few pages, you will find all of the TC Laminates needed for your treatment coordinator rooms to have a successful consultation.

INVISALIGN VS. BRACES

In order to explain the difference between Invisalign and Braces, please refer to the “Invisalign Vs. Braces” laminate that has to be placed in both TC rooms in your clinic.

If there are any changes, marketing will contact your clinic directly.

<div>   </div> <div> Vs. Braces </div>		
Clear/ Invisible	Color	Silver, but also available in enamel-colored
2-24 hours per day of an average of 12-14 months	Treatment Time	24/7 for an average of 2 years
Brush and rinse trays in lukewarm after eating or drinking	Standard Maintenance	Brush brackets, wires, and teeth regularly. Water pick may be needed.
Every 6-8 weeks	Follow-Up Visits	Almost every month
Positioner or retainer	Post Treatment Needs	Positioner or retainer
<ul style="list-style-type: none"> - Invisible - Removable - No food restrictions - No Issues with food getting caught - No difficulty eating - No discomfort from wires - No extra visits for brackets breaking off 	Pros	<ul style="list-style-type: none"> - Can't misplace them - Less discipline needed
<ul style="list-style-type: none"> - Must remove before eating or drinking (besides water) - May have some discomfort for first day or two with each tray 	Cons	<ul style="list-style-type: none"> - May have some pain, sores, headaches, or discomfort throughout treatment - May have some tooth discoloration or chipping - Food restrictions - Brackets can break off

PROBLEMS TO WATCH FOR IN CHILDREN AGES 6 TO 8

In order to explain the different problems children can face between the ages of 6-8, please refer to the “Invisalign Vs. Braces” laminate that has to be placed in both TC rooms in your clinic.

If there are any changes, marketing will contact your clinic directly.



**ORTHODONTIC
EXPERTS**

Problems to Watch for in Children Ages 6 to 8



Excessive Spacing



Crowding



Open Bite



Overbite (Deep Bite)



Crossbite (Front Teeth)



Crossbite (Back Teeth)



Underbite



Overjet (Protrusion)



Abnormal Eruption

FIXED RETAINER GUIDES

In order to explain Fixed Retainers to the patient and how it will benefit them after getting debonded, please refer to the “Fixed Retainer Guide” laminate that has to be placed in both TC rooms in your clinic.

If there are any changes, marketing will contact your clinic directly.

**ORTHODONTIC
EXPERTS**

Fixed Retainer Guide

Upper fixed retainer is bonded
from lateral to lateral

Lower fixed retainer is bonded
from canine

POOR HYGIENE DECALCIFICATION

In order to explain Poor Oral Hygiene Decalcification and how to prevent it, please refer to the “Poor Oral Hygiene Decalcification” laminate that has to be placed in both TC rooms in your clinic.

If there are any changes, marketing will contact your clinic directly.



Poor Oral Hygiene Decalcification

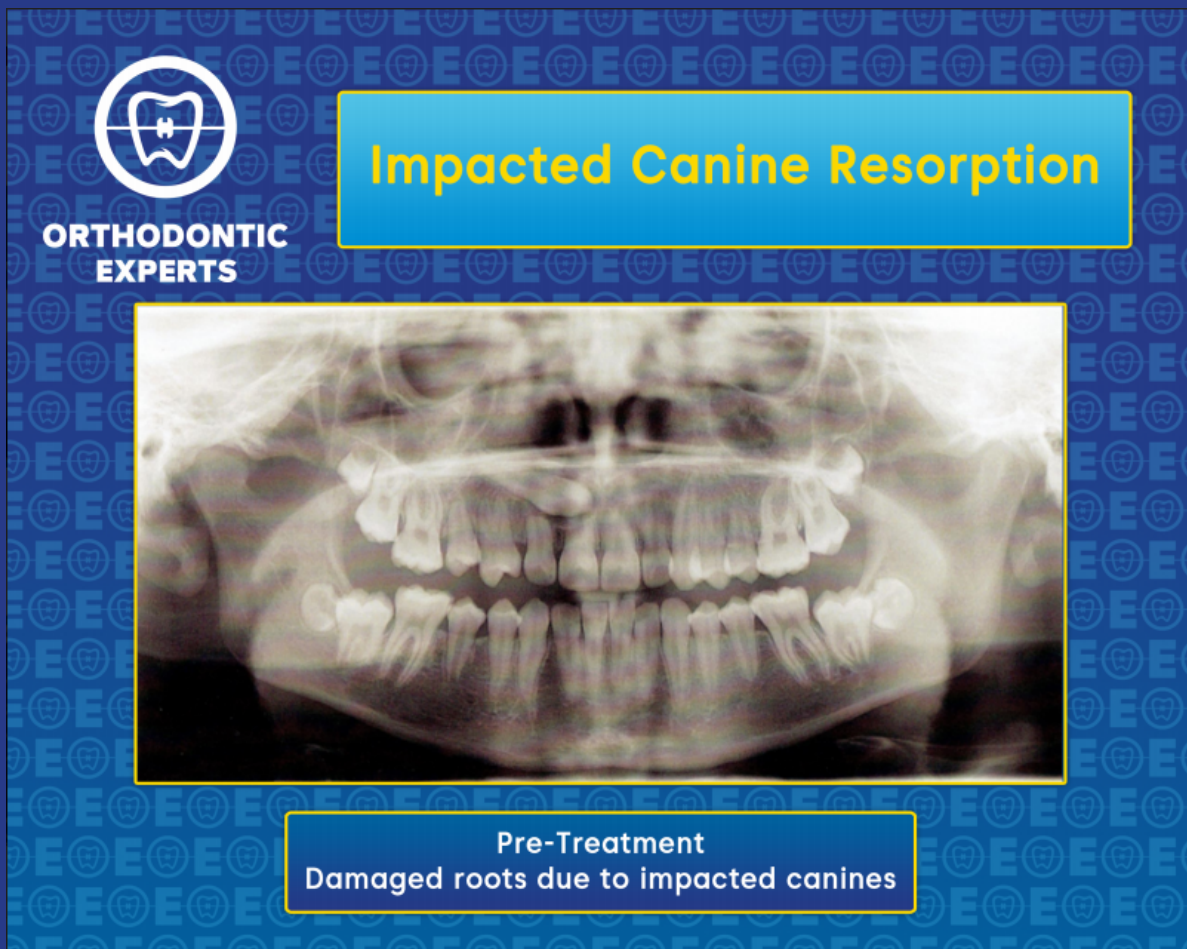


Decalcification, gum resorption, and plaque build- up due to poor oral hygiene

IMPACTED CANINE RESORPTION

In order to explain Impacted Canine Resorption and how to prevent it, please refer to the “Impacted Canine Resorption” laminate that has to be placed in both TC rooms in your clinic.



If there are any changes, marketing will contact your clinic directly.



SMILE PROTECTION PLAN

For details regarding the Smile Protection Plan, please refer to the TC Manual or your direct supervisor.

If there are any changes, marketing will contact your clinic directly.

SMILE PROTECTION PLANS		
 <p>We want you to have a beautiful smile and healthy bite for the rest of your life. That's why we encourage lifetime retainer wear, even if it is a few nights per week. One set of clear removable retainers is included in your treatment fee, at no additional charge. However, as you can imagine, retainers are often lost or broken and have to be replaced at a high cost, or teeth start shifting. The replacement fee for lost or broken retainers can be between \$200-\$400. This is because new sets of impressions or scans have to be taken and sent to a laboratory to fabricate new retainers.</p> <p>This is why we came up with more cost effective smile protection plans to help you keep your beautiful smile.</p>		
BRONZE	SILVER	GOLD
\$200	\$175/ARCH OR \$350/BOTH	\$500
ADDITIONAL SET OF RETAINERS, PLUS 50% OFF ANY LOST OR BROKEN RETAINERS FOR LIFE	FIXED WIRE RETAINERS	LIFETIME RETAINER INSURANCE
<ul style="list-style-type: none">• 1 additional set of clear, removable retainers (2 sets total)• 3D printed models of your teeth• 50% off any lost or broken clear, removable retainers FOR LIFE• \$400 + Value• Add fixed retainers for only \$150/arch	<ul style="list-style-type: none">• 1 set of clear, removable retainers included with treatment• Upper and/or lower fixed retainers	<ul style="list-style-type: none">• 1 additional set of clear, removable retainers (2 sets total)• 3D printed model of your teeth• FREE clear, removable retainers FOR LIFE with model• \$1,000 + Value• Add fixed retainers for only \$150/arch
		
<small>*Discount does not apply if it is necessary to rescan or impress, which can happen due to the following: your teeth shift from their original position due to not wearing your retainer(s) and the new tooth position is different from the final model. Or you lose or break your models. Protection plans are valid only on clear, removable retainers. Plans can only be purchased before or at the time of braces removal. Restorations (crowns, implants, fillings, etc.) that cause retainers to not fit will void Smile Protection Plan Insurance. If retainers no longer fit due to restorations, the patient will have the opportunity to purchase a new Smile Protection Plan at the regular fee.</small>		
Your orthodontist recommends you get a fixed retainer for:		
Upper <input type="checkbox"/>		
Lower <input type="checkbox"/>		

Advanced Online Store Training



Step 1: Go to Website



www.OrthodonticExpertsStore.com

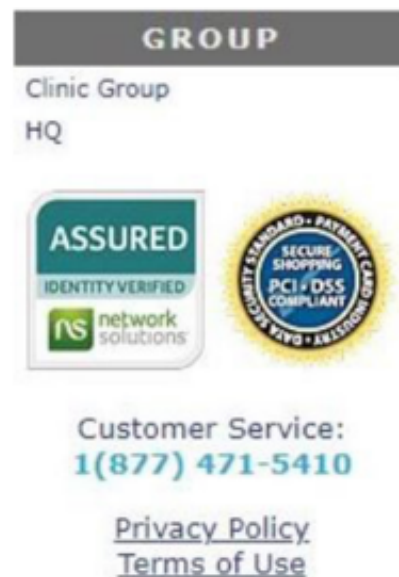
Once, you're on the website, you should see a screen like this:



Step 2: Login



On the left side of the main page, you will see a spot that says, "Group," click on the "**Clinic Group**" when you're about to login.



Continue

Location Number	Delete
001 Arlington Heights	Delete this Location Number
002 Harwood Heights	Delete this Location Number
003 Chicago-Pilsen	Delete this Location Number
004 Rockford	Delete this Location Number
005 Algonquin	Delete this Location Number
006 Algonquin	Delete this Location Number
007 DeKalb	Delete this Location Number
008 Chicago-Bucktown	Delete this Location Number
009 Colorado Springs	Delete this Location Number
010 Littleton	Delete this Location Number
011 Mundelein	Delete this Location Number
012 Hillside/Westchester	Delete this Location Number
013 Homewood	Delete this Location Number
014 Avondale	Delete this Location Number
015 Joilet	Delete this Location Number
016 Aurora	Delete this Location Number
016 Aurora	Delete this Location Number
017 Beloit	Delete this Location Number
018 Waukegan	Delete this Location Number
019 Skokie	Delete this Location Number

Step 4: Picking Out Your Items To Order



There will be different categories to order from on the online store on the left side under “**Categories.**”

Please, choose from the following when you’re logged in:

- Apparel
- Apparel Youth
- Marketing Collateral
- Promotional Products
- Stationary/ Postcards



**ORTHODONTIC
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OFFICIAL ONLINE STORE
ORTHODONTICEXPERTSSTORE.COM

[Order Status](#) [FAQ](#) [Contact Us](#) [Custom/Bulk Orders](#)

CATEGORIES

[Apparel](#)
[Apparel-Youth](#)
[Marketing Collateral](#)
[Promotional Products](#)
[Stationery/Business Cards](#)

SEARCH

search... 

Customer Service:
1(877) 471-5410

[Privacy Policy](#)
[Terms of Use](#)



**ORTHODONTIC
EXPERTS**

MERCHANDISE

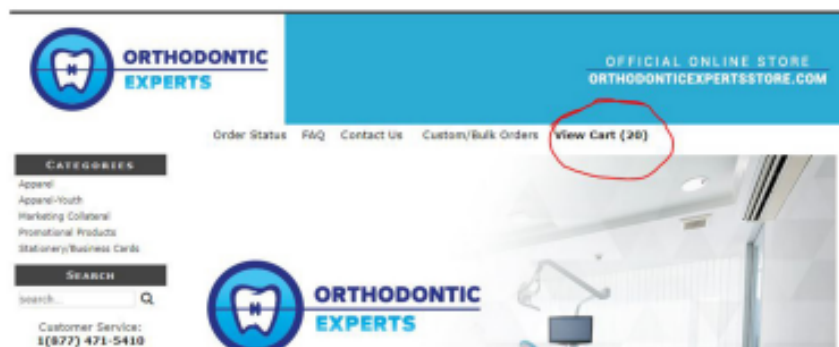


Last Step: Checking Out



After you picked out the items that you need to order for your clinic. Please, click on the button at the top right of the page.

(See photo for reference)



Once you have clicked on "View Cart," then this is when you will put in the Clinic Managers First and Last name as well as clinics address/ phone number.

After you press submit, you will receive an email stating "Needs approval."

Once the order is approved, the shipment will arrive within 2 business days. For certain collateral, it may take up to 5 business days.

ONLINE STORE CONTACT INFORMATION

*Advanced Online Support Number
1-877-471-5410*

*Natalie Miller:
831-238-0984
nataliemiller01@orthodonticexperts.com*

*Anthony Hawkins:
(815) 341-2950
anthony@orthodonticexperts.com*

*Irena Gerdov:
224-628-0322
irenac@orthodonticexperts.com*

Clinic Slideshows



CLINIC SLIDESHOW

Each Clinic will have a slideshow that's played continuously on the tv in the waiting area. Marketing is responsible for updating each slideshow with current clinic photos for every opening so that they can be casted on the lobby clinic tv. The link to the slideshows is listed below.

<https://drive.google.com/drive/u/0/folders/197zXWmrpF2gSrPAGKFco4M01A1f5LVT5>



Traditional Advertising



TRADITIONAL MARKETING

Outdoor Advertsing is a great way to gain brand awareness and leads for your clinic. Marketing is responsible for researching the best marketing efforts that will help bring leads into your clinic. These include:

- Billboards
- Bus Banners
- Bus Shelters
- Mailings
- Newspaper/Magazine
- Radio
- TV Commercial
- Special Events

Digital Advertising



GOOGLE ADS

As you may know, the marketing department runs Google Ads to gain leads for your clinics.

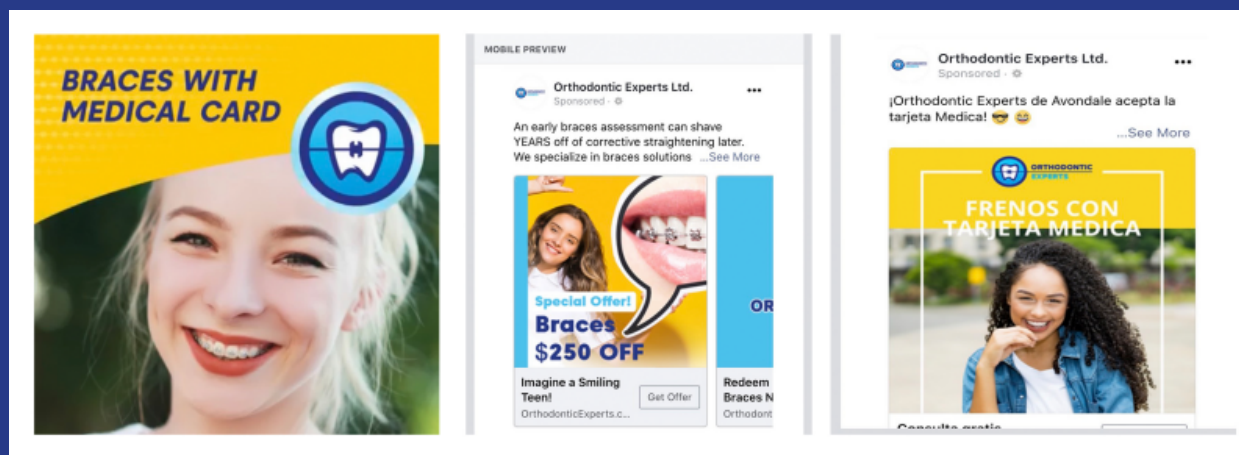
If you have any questions about the specials, please contact our Marketing Manager , Anthony Hawkins, at anthony@orthodonticexperts.com.

When our patients fill out the Facebook form, they will get a notification sent to them thanking them for their interest in Orthodontic Experts. The information from the patient will be then generated in the specific location call list on HubSpot for the call center team to then contact them to schedule their consultation at your location.

It is very important that you mark on the contract the special discount that they will be receiving.

Important Coupon Disclaimer: Cannot be combined with any other offers. Cannot be redeemed for cash. Cannot be combined with insurance discounts. Rules and restrictions may apply.

Please see the most current online advertisements that is going on below:



FACEBOOK ADS

As you may know, the marketing department runs Facebook Ads to gain leads for your clinics.

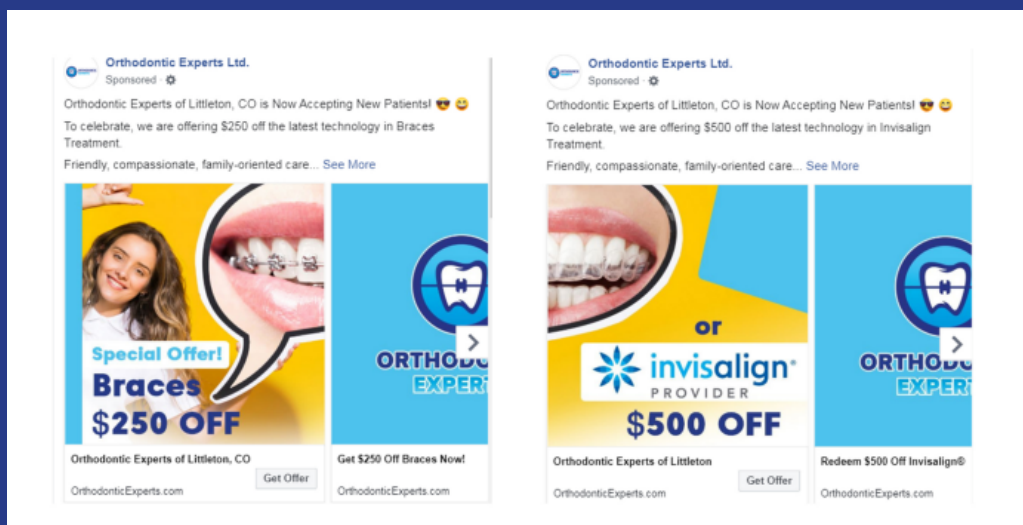
If you have any questions about the specials, please contact our Marketing Manager, Anthony Hawkins, at anthony@orthodonticexperts.com.

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Please see the most current online advertisements that is going on below:



Social Media



FACEBOOK

Facebook is the largest social media platform in the world and is used more frequently for news and information. Facebook post options include:

- **Text Posts** only consist of text. There are no images, videos or any other visual aspect to the post.
- **FB Images** are pictures or GIFS that can accompany a text post, or stand alone.
- **Videos** are posts that include an organic video or a link to a video that accompany a text post or stand alone.
- **FB Stories** are only available for viewing for 24 hours before they disappear.

It is the clinic staff's responsibility to let all the patients know to follow and like their specific location Facebook page.

Did you know that patients receive extra points on their Smile Rewards when they follow and like us!

Keep, Keep, Reminding Them!

INSTAGRAM

Instagram is primarily a photo sharing platform. But, recent developments suggest that it is switching over to business and Instagram Reels/videos instead. It's going to be hard to shift that focus but it is necessary.

Instagram has multiple features on what to post and how to post including:

- **Photos** are a posts with only one picture and caption on it.
- **Carousels** are posts that feature 2+ pictures on a single post with a caption.
- **Reels** are videos that are one minute or less
- **Videos** can be posted like a regular post, that are not reels, under one minute.
- **Instagram Television (IGTV)** are videos that are too long to be considered a reel and can include promotions, Q&A's, etc.
- **Stories** are posts that disappear after 24 hours. You still have access to them and can choose to highlight them on your profile if you choose. These stories can be used for fun interactions, or posts that you don't necessarily want on your profile page forever.
- **Advertisements** are posts that companies pay to promote, but aren't necessarily on their profile page.

TWITTER

Twitter is primarily a news and entertainment site specializing in short and quick posts. Tweets must be under 240 characters and can include multiple images or one video or GIF.

Hashtagging on twitter needs to be intentional and brief. Since hashtags make up characters, it's important to use them with purpose.

POSTING SOCIAL MEDIA TO HUBSPOT

Plan out your schedule with the Social Media Content Plan. Develop a schedule that will work for you and what your goals are.

Go onto Hubspot and click on 'create social post.'

There, click on the Instagram logo to start creating your post.

Click the account you would like to post to.

Upload the content into the Hubspot post.

Write your caption. Say something eye-catching and informative/interesting.

Put in the time you would like to post. Hubspot automatically picks times that are the best to post, but you can pick any time.

Use hashtags! More info on hashtags later.

Click schedule post!

HASHTAGS

Hashtags on Facebook aren't really necessary, but don't hurt to have. The impressions and interactions don't increase with hashtags, but they don't decrease.

Engagement is similar to how to engage with Instagram. All clinics have their very own location Facebook page linked to the main Orthodontic Experts page.

Hashtags are becoming more necessary to use on Instagram posts. This is how Influencers and microinfluencers are gaining traction. Here is a collection of our most common hashtags:

HASHTAGS

Orthodontic Experts: #OrthodonticExperts #IllinoisSmiles
#IllinoisDentistry #DreamSmiles #Orthodontics #SmileJourney
#TopOrthodontist #orthodontist #illinoisorthodontics
#dentalcare #oralhygiene #braces #dentalclinic
#orthodontictreatment #OEDreamSmiles

Braces On: #Dentistry #BracesJourney #BracesOn
#BracesFAQ

Braces Off: #BracesOff #BracesFAQ #BracesJourney
#dentistry #newsmile #smilemakeover #straightteeth

Orthodontic Experts Colorado: #Orthodonticexperts
#Coloradosmiles #Coloradoorthodontics #Coloradodentistry
#Orthodontics #DreamSmiles #SmileJourney
#TopOrthodontist #dentalcare #oralhygiene #braces
#dentalclinic #orthodontictreatment

Illinois Dental Careers: #IllinoisDentalCareers
#dentalassistant #orthodonticassistant #TopOrthodontist
#orthodontist #illinoisorthodontics #dentalcare #oralhygiene
#braces #dentalclinic #orthodontictreatment #IllinoisSmiles
#IllinoisDentistry #DreamSmiles #Orthodontics

You can add and remove hashtags as needed!

Social Media Checklist

- Photo release form signed
- Make sure the patient is in the middle of the background
- Do not take photos too high or too low
- Do not tilt the camera
- Turn on your flash
- Portrait mode (if possible) is on
- Don't stand too far away from the patient

X
X
X
X
X
X
X

X
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X
X
X
X

X X X X X X

CLINIC PHOTOS

Clinic photos are very important for the Orthodontic Experts brand on our social media channels (Facebook, Twitter, Instagram, Tik Tok, Snapchat and LinkedIn.)

It is mandatory to send all photos to the marketing coordinator for all bondings, debonds, events, and etc.

For all photos, please make sure the patient has signed the photo release form on OpenDental under Forms.

This is important because these photos will be used for social media and other marketing purposes for Orthodontic Experts.

Once photo is taken, please have the clinic manager send to Social Media Coordinator



Social Media Policy

POLICY:

This policy provides guidance for employee use of social media, which should be broadly understood for purposes of this policy to include blogs, wikis, microblogs, message boards, chat rooms, electronic newsletters, online forms, social networking sites, and other sites and services that permit users to share information with others in a contemporaneous manner.

PROCEDURES:

The following principles apply to professional use of social media on behalf of Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC as well as personal use of social media when referring to Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC.

- Employees need to know and adhere to the Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC code of conduct, Employee Handbook, and other company policies when using social media in reference to Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC.
- Employees should be aware of the effect their actions may have on their images, as well as Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC image. The information that employees post or publish may be public information for a long time.
- Employees should be aware that Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC may observe content and available by employees through social media. Employees should use their best judgement in posting material that is neither inappropriate nor harmful to Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC, its employees, or customers.
- Although not an exclusive list, some specific examples of prohibited social media conduct include posting commentary, content or images that are defamatory, pornographic, proprietary, harassing, libelous, or create a hostile work environment.
- Employees are not to publish, post, or release any information that is considered confidential or not public. If there are questions about what is confidential, employees should contact the Human Resources Department and/ or supervisor.
- Social media networks, blogs, and any other types of online content sometimes generate press and media attention or legal questions. Employees should refer these inquiries to

authorized Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC spokesperson.

- If employees encounter a situation while using social media that threatens to become antagonistic, employees should disengage from the dialogue in a polite manner and seek the advice of a supervisor.
- Employees should get appropriate permission before you refer to or post images of current or former employees, members, vendors or suppliers. Additionally, employees should get appropriate permission to use a third party's copyrights, copyrighted material, trademarks, service marks or other intellectual property.
- Social media shouldn't interfere with employee's responsibilities at Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC. All computer systems are to be used for business purposes only. When using Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC computer systems, use of social media for business purposes is allowed (ex: Facebook, Twitter, Instagram, etc.,) but personal use of social media networks or personal blogging of online content is discouraged and could result in disciplinary action.
- Subject to applicable law, after- hours online activity that violates the Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC code of conduct or any other company policy may subject an employee to disciplinary action or termination.
- If employees publish content after- hours that involves work or subjects associated with Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC, a disclaimer should be used, such as this "The postings on this site are my own and may not represent Orthodontic Experts Ltd. and Orthodontic Experts Colorado PLLC positions, strategies or opinions."
- It is highly recommended that employees keep Orthodontic Experts Ltd. and Orthodontic Experts PLLC related social media accounts separate from personal accounts, if practical.

Social Media Policy on G-Drive



Date: 06/10/2021

PHOTO RELEASE FORM

I, Test the undersigned, do hereby relinquish any and all rights to photographs, portraits, transparencies, negatives, prints, Polaroids or other photographic reproductions captured with still, motion picture, video, digital or other cameras for use by Orthodontic Experts for social marketing (Facebook, Google+, Instagram) use.

Patient's Name: Test
Patient's Address: _____

Phone #: _____

Patient's Signature

If under 18 years of age, Parent or Guardian Signature:

EBook

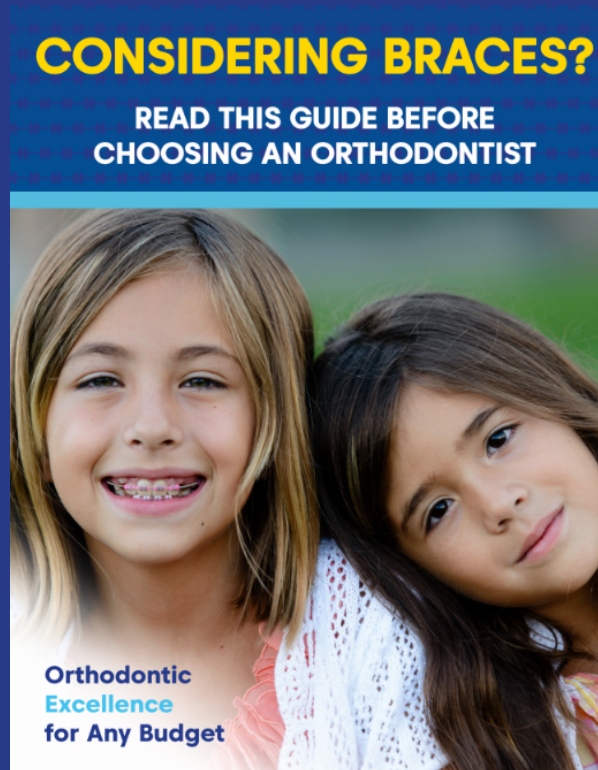


EBOOK

WHAT EXACTLY IS AN EBOOK?

An eBook is a piece of literature in a digital, PDF format that can be viewed on a computer screen or handheld device. The information included should be simple to understand, straightforward, informative, and educational for the reader. You can choose to appeal to a large audience or narrow in to target a certain niche.

Our EBOOK is a logical series of articles to help educate customers on the importance of Orthodontics. Our EBOOK can be found at the link below.



https://drive.google.com/drive/u/o/folders/1KOPQzjnp_mSp9lyNLLv5j4nKoKKK-sG_s

Dental Relations Department



WHAT IS DENTAL RELATIONS

Primary duties include identifying business opportunities, building and maintaining successful relationships with potential and existing dentists, collaborating with executives on business strategy to determine objectives, evaluating current business performance and maximizing business reach and potential.

Business Development is the creation of long-term value for an organization from customers (patients), markets, and relationships. At Orthodontic Experts, our BD Department focuses on Building and Maintaining Relationships with other dental professionals. These Businesses are mainly composed of General Dentists.

"YOU CAME FROM WHERE?" OBTAINING CORRECT INFORMATION

Once the patient hands in their information on an ipad to you, the first thing you need to ask is:

Who referred you to us?

1. Patient will give the name of the Dentist, which you will then populate in Open Dental

OR

2. Hand in the referral to you, which you will scan into images, and populate in Open Dental

OR

3. Tell you, nobody, I found you on _____ whatever the source they provide, populate it in Open Denta

"OK, WHAT DO I CLICK?"

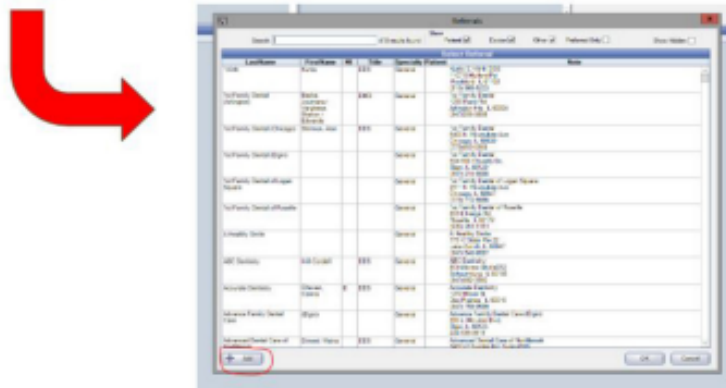
ADDING A NEW REFERRAL SOURCE

1-Double click referral section of patient information



Payor Types	
Language	
Referrals	None

2-Click Add under referrals dialog box



The 'Referrals' dialog box shows a list of referral sources. The 'Add' button at the bottom left is circled in red.

3-Confirm whether the referral source is an existing patient



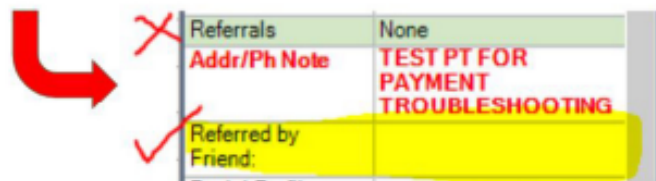
Is the referral source an existing patient?

Yes No

*If yes → 3(A)

*If no → 4

3(A)- **STOP!**: Use the referred by friend option to input this source



The 'Referrals' dialog box shows the 'Referred by Friend' option selected and highlighted in yellow. A red checkmark is next to it. The 'Addr/Ph Note' field is also highlighted in yellow.

"I SEE OTHER REFERRAL SOURCES" WHAT DOES OTHER MEAN?

- Billboard - Address doesn't matter
- Internet-Google/Yahoo
- Polish Radio
- Ukrainian Radio
- USA Radio
 - Walk-In -Drive By counts under this category as well
- Insurance - Provider does not matter
- Russian Newspaper
- Ukrainian Newspaper
- Direct Mail - Postcards received in mail
- Newspaper Ad - varying newspaper
- Magazine Ad
 - Varying magazines
- Facebook - This can be a facebook ad or our website
- Instagram
- Twitter
- Yelp -WGN
- Event- Quincinera, Healthy Kids Day, Row-row expo, NIU Health and Wellness, etc.

Sponsorship - Sports sponsorships of teams, Boy's Scouts, Girl's Scouts, Rockford dancing with stars, etc

Community Outreach - Flyers, Ads within apartments, Ads in Churches, etc.



-Remember: This list is not comprehensive! It will be constantly changing and evolving as we continue to implement new marketing methods, strategies, events and visit more Dental provider offices.

-That is why it is important to keep an eye on the referral list to make sure all referring sources are being inputted for EVERY patient

“I can’t remember..” Leaving Referral Field Blank



-The referral field should NEVER be left blank. ESPECIALLY FOR NEW PA AND PRIVATE CONSULTATIONS!

-Having this field filled helps the Business Development Department identify new referring Dentists and focus in where patients are coming from. Likewise, the Marketing department also uses this information for similar analytical data

-Filling this field helps drive focus to the sources most lucrative in referring patients this, in turn, helps your office achieve optimal results in terms of goals being met and your schedule being filled

-In today's modern world it can be easy to forget where you obtained information. However, patients will have heard about us **IN SOME WAY. IT IS UP TO YOU** to ask the appropriate questions and make sure we know where patients heard about Orthodontic Experts - even if they say "I don't know" there is a source.

“Wait What?...”

How To Add Referred By Friend (Reminder)



1. Use the referred by friend option to input this source

Referrals	None
Addr/Ph Note	TEST PT FOR PAYMENT TROUBLESHOOTING
Referred by Friend:	

2. In the Edit Patient Field dialog box - input information of friend and/or patient number



Test, Test - Pt #-921 -BB

****PRO TIP****

Don't forget to have the T.C. and or manager apply the "Refer a friend credit to the applicable accounts."

“Hey Google...Tell Me a Story”

Finding Unsure Referral Sources



-If patients have some sort of an idea of where they were referred from, use your search tools to find the source - there are 3 main methods

-Search using open Dental: By typing in the name of the Dental office, Doctor name or even the City of the office you can find a referral source

-Lets try and find the Dental Dreams in Chicago Heights



****Note how searching “Chicago Heights” finds the source without having to type “Dental Dreams” in the search field**

Referrals

Search 1 results found

Show Patient ☒ Doctor ☒ Other ☒

Select Referral					
LastName	FirstName	MI	Title	Specialty	Patient
Dental Dreams-Chicago Heights				General	Dental Dreams-Chicago Heights 567 W 14th St Chicago, IL 60411

-Search using Google: You can use what information the patient has and conduct a quick Google search to find the specific source's exact information.

-Using the same example as before, we can search Google for the same address using search "Dental Dreams on 14th St"

The screenshot shows a Google search for "Dental Dreams on 14th St". The search bar contains the text "Dental Dreams on 14th St". Below the search bar, the results show "About 42,000,000 results (0.76 seconds)". The first result is "West 14th St, Chicago Heights, IL | Family Dentist ... - Dental Dreams" with a link to "https://www.dentaldreams.com/dental-dreams-chicago-heights". The second result is "Illinois - Dental Dreams" with a link to "https://www.dentaldreams.com/illinois". The third result is "Dental Dreams 567 W 14th St Chicago Heights, IL, Dentists - MapQuest" with a link to "https://www.mapquest.com/us/illinois/dental-dreams-270997297". The fourth result is "Dental Dreams - 11 Photos & 13 Reviews - General Dentistry - 567 ..." with a link to "https://www.yelp.com - Health & Medical - Dentists - Pediatric Dentists". To the right of the search results is a map showing the location of "Dental Dreams-Ch. Heights" at "567 W 14th St, Chicago Heights, IL 60411". The map includes a street view image and a list of nearby locations: "Food 4 Less", "Mannus Chicago Heights Crematorium", "Pierazzo Brothers Funeral Home", and "Wendy's".

In this example we can see that even though the search term was vague. The correct Dental Office was shown.

-Use the given referral source: Patients will sometime hand you a physical referral form. This source can specify the source most accurately due to the information being prominently displayed.

The screenshot shows a "Premier DENTAL LLC" referral form. The form is titled "REFERRAL FORM" and includes fields for "DATE", "PATIENT", "DOB", "SPECIALIST", "PERIODONTIST", "ENDODONTIST", "ORTHODONTIST", "ORAL SURGERY", and "OTHER". The "SPECIALIST" field is marked with a checkmark. The "DATE" field is filled with "10/4/18". The "PATIENT" field is filled with a redacted name. The "DOB" field is filled with a redacted date. The "SPECIALIST" field is filled with "DENTIST". The "PERIODONTIST" field is filled with "ENDODONTIST". The "ORTHODONTIST" field is filled with "ORAL SURGERY". The "OTHER" field is filled with "OTHER". The "HAS BEEN REFERRED TO YOUR OFFICE FOR THE TREATMENT OF:" field is filled with "Deep bite". The "REMARKS" field is filled with "Patient has deep bite and needs orthodontic treatment. Please refer to Dr. [redacted] at [redacted] for treatment." The "DR." field is filled with "Dr. [redacted]". The "ADDRESS" field is filled with "1345 West 23rd Street, North Riverside, IL 60546 Phone (708) 467-0908 Fax (708) 467-0910".

Here, we can see that the patient has a physical referral form. The document shows us the dental provider's information.

You can find the name of the provider address and telephone number.

Similar procedure is used as it is to identify referred from source.

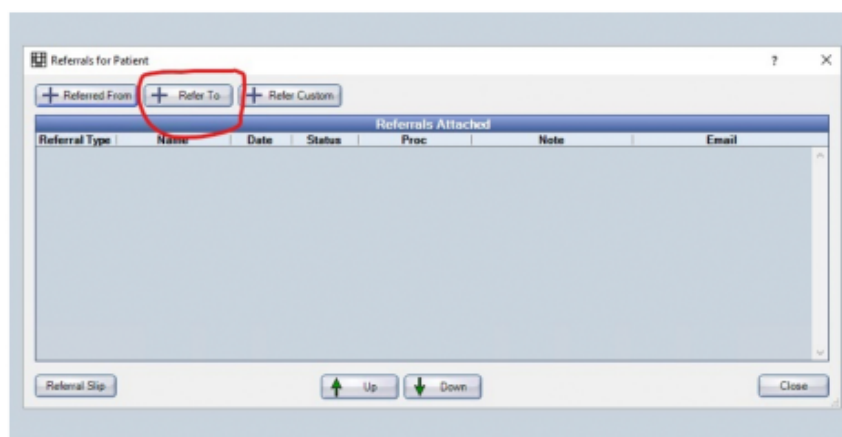
Locate a patient account and go to Family module



Double Click on Referralst

Sec. Provider	None
Payor Types	
Language	
Referrals	None
Addr/Ph Note	TEST PT FOR PAYMENT TROUBLESHOOTING

Dial Box will pop up, click on refer to box



Pick the one that you would like to refer a patient to based on their home address and click ok

Edit Referral Attachment

Referral Type: **To** (From, Referral (oth))

Name: Advanced Family Dental [Edit Referral] [Change Referral]

Notes about referral source: Advanced Family Dental 6338 S Pulaski Rd Chicago IL 60638 Bronze

Referring Provider: LAB- LaBlonde, Brian [None]

Date: 10/02/2019

Order: 0

Status (if referred out): None

Patient note:

Referral Slips (double click to view):

Transition of Care: ☒ (From or To another doctor)

Procedure:

Date Proc Completed:

[X] Detach [OK] [Cancel]

Now that dentist's info appeared under Referrals Attached, hit close

Referrals for Patient

+ Referred From + Refer To + Refer Custom

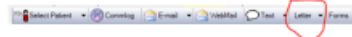
Referrals Attached						
Referral Type	Name	Date	Status	Proc	Note	Email
To	Advanced Family Dental	10/02/2019	None			

[Referral Slip] [Up] [Down] [Close]

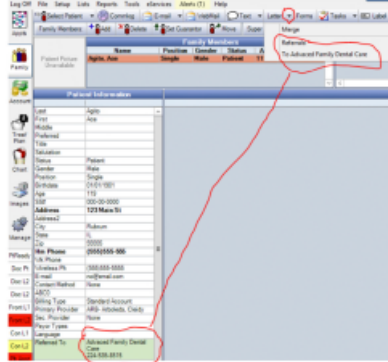
Success! You have added refer to dentist to the patient's account.

City	Rubrum
State	IL
Zip	55555
Home Phone	
Work Phone	
Wireless Ph	(555)555-5555
E-mail	
Contact Method	None
ABC0	
Billing Type	Standard Account
Primary Provider	LAB- LaBlonde, Brian
Sec. Provider	None
Payor Types	
Language	
Referred From	1st Family Dental of Little Village
Referred To	Advanced Family Dental 773.767-1554
Addr/Ph Note	TEST PT FOR PAYMENT TROUBLESHOOTING
Hobbies	
Referred by Friend:	

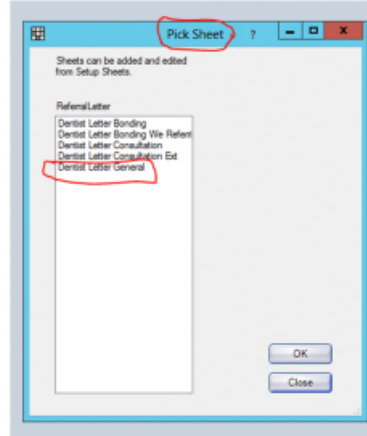
11. Navigate to the letter option in Open Dental:



12. Press the small arrow to the left to populate the "Quick Letter" option under "Referral," select the referring dentist you added in step 9:



13. In the "Pick Sheet" dialog box select the "Dentist Letter General":



14. Verify the information is correct and select the print option to print out your referral:

08/21/2020

FROM: Orthodontic Experts LTD Arlington
1020 S. Arlington Heights Road
Floor 2
Arlington Heights, IL 60005-3169

TO: Advanced Family Dental Care
300 S McLean Blvd
STE M
Elgin, IL 60123

RE patient: [REDACTED]

Dear Doctor,

Please feel free to contact me if you have any questions.

Sincerely,
Cledy Arboleda, DDS, MS

[Signature]

Your Referrals Are Greatly Appreciated!

Date time: 08/21/2020 11:09 AM Internal Note: [] ☐ Show Tool

Description: Dentist Letter General

Show Order in Rosh: ☐

ADDING A REFERRAL SOURCE TO YOUR CLINIC LIST

There will be times when a dental office or referring source is not in your clinic's pre-populated list of sources.

In this case, the source will need to be added to your clinic's list by the Business Development Administrative Assistant.

An email needs to be sent to bdsupport@orthonticexperts.com with the following information:

Patient Number
Dental Office Name
Doctor First Name, Doctor Last Name
Address
SUITE #
City, State Zip
123-456-7890 (Phone number)

If any of this information cannot be obtained or is not available, please send the email with as much information as possible.

The administrative assistant will respond to your request, and state the source has been added to your clinic's list and attached to the patient included in the email as well.

Note: If the new source is not a Dental Clinic, an email with the patient number and name of the source is sufficient.

This format is shown below:

Patient Number
New(**NON DENTAL**)Source Name

REPORTING

The BD Administrative Assistant will also send a report indicating your clinic's empty "Referred From" patient sources to your manager weekly.

This report shows any missing referral sources for your clinic in the week. They must be filled in by the species date and **CANNOT** remain blank.

Sources may be filled by reviewing patient intake forms or contacting the indicated patients from the report directly.

LUNCH AND LEARNS

Lunch and Learns are an opportunity for us to really bond with a General Dentist office and is a golden opportunity to add them to our referral base and get more patients.

Attendees: The most important people that we need are the manager and the Orthodontist since combined that have the most knowledge of what goes on in the office and that will be important for conversation.

Dynamic: The typical lunch and learn ranges from ½ an hour to an hour and involves us bringing them lunch and having a conversation with them telling them more about us and finding out more about how we can better serve their patients. The key is for there to be a connection between us and their general dentist and manager.

Scheduling: Business liaisons will be in contact with the manager on when to schedule. Time on the schedule is looked for in the future when patients aren't already scheduled. Business Liaisons will then contact the managers to block off time for the Lunch and learn. Block offs for lunch and learns range from 1 ½ to 2 hours depending on where the lunch and learn is in order to give us time to get there on time and get back to our patients.

DISCOUNTS FOR REFERRING DENTISTS

[This discount is for doctors and their staff ONLY]

****There is an age limit for immediate family members up to the age of 26.**

Dentist and Family [Immediate] FREE
[Immediate family is husband, wife, and kids]

Dentist and Family [Not immediate, such as brothers, sisters, parents, cousins, nephew, nieces, etc.]

[Please check Open Dental to find out what level the dentist is]

Gold- 30% OFF

If they don't have insurance 30% off total. If they do have insurance 30% off their portion

Example: Not immediate family member Irena needs 24 months of treatment, she has insurance.

Treatment is \$5000 Insurance will pay \$2000, patients portion is \$3000 - 30%=\$2100

Example 2: Not immediate family member Irena needs 24 months or treatment, she doesn't have insurance.

Treatment is \$5000 no insurance -30% =\$3500

Silver -20% OFF

If they don't have insurance 20% off total. If they do have insurance 20% off their portion.

Bronze -10% OFF

If they don't have insurance 10% off total. If they do have insurance 10% off their portion.

Staff and their immediate family.....30% OFF

[immediate family is husband, wife, kids]

Same example as for the dentists, 30% OFF the patients' portion, which is before or after insurance

Staff and not immediate family.....10% OFF

Same example as for the dentists, 10% OFF the patients' portion, which is before or after insurance.

CONTACT INFORMATION

We are always here to assist your clinic with anything and any ideas are always welcome. Feel free to email any one of our team members to assist you.

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