

Orthodontic Growth Playbook

An insider playbook combining Brain Bytes' strategy and real-world POP insights to help leading orthodontic practices grow their authority and impact.



Branding
Strategy



Dominate
Reviews



SEO/SGE
Footprint



Social
Media



Referral
Engagement



Website
UX/UI

BRAIN BYTES
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POP: Orthodontic Growth Playbook

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Context for the Playbook

Savvy Lorestani, CEO of Brain Bytes Creative, led a marketing summit with doctors from the Premier Orthodontic Practices (POP) group. During the symposium, Savvy shared the strategic framework Brain Bytes uses to help practices become the authority in their market while also facilitating a rich discussion among doctors about what is truly working inside their practices.

The result was a powerful exchange of ideas. By pairing the strategic perspective of Brain Bytes with the real-world experience of leading orthodontists, we created this playbook to help POP members sharpen their marketing, amplify what makes their practices special, and continue building authority in their communities.

How to Use This Playbook

Use this guide to identify where your practice already has momentum, where there may be untapped opportunity, and which next step will create the greatest lift.

You do not need to walk away and overhaul everything tomorrow. Instead, think of this playbook as a way to sharpen your focus. The goal is not to do more marketing. The goal is to make the marketing you do more intentional, more strategic, and more impactful over time.

Brain Bytes Winning Strategies Framework

Before diving into the findings from the seminar, it is helpful to first ground ourselves in the framework that guided the discussion.

At Brain Bytes, we use what we call the **Winning Strategies for Marketing Authority**. This framework was developed after years of working with orthodontic practices and observing the patterns that consistently separate practices that grow intentionally from those that struggle to gain traction.

The Winning Strategies are not meant to be an overwhelming checklist. Instead, they serve as a practical guide to help practices focus on the foundational areas that drive visibility, trust, and patient growth. When these pillars are strong and working together, practices are far more likely to become the authority in their market.

The following strategies outline those key pillars and help provide context for many of the insights and examples shared during the seminar:

Brand that Converts

A strong brand does more than look good. It converts.

Every orthodontic practice is trying to convert multiple audiences: patients who discover the practice on their own, patients who were referred by dentists or friends, referring doctors evaluating where to send patients, and even potential employees deciding where they want to work.

When branding is done well, it reinforces credibility, creates trust, and makes the practice feel like the obvious choice.

1. **Tier 1 - The Bare Minimum to Compete:** At this level, the goal is simple: look polished and trustworthy so patients feel confident contacting your practice. These elements ensure your practice looks modern, credible, and professional:
 - a. A crisp logo and simple brand guidelines
 - b. High-quality photography and imagery
 - c. A modern website design that works well on mobile
 - d. Clear messaging about what your practice does
 - e. Trust signals such as awards, badges, testimonials, and reviews
 - f. Consistent visual branding across social media, signage, and materials
2. **Tier 2 - Authenticity and Trust:** The next level goes beyond aesthetics and begins building real connection. This level helps patients feel like they know you before they ever walk through the door. Here are the criteria for tier 2:

- a. Authentic photos of the team and office
- b. Real patient stories and testimonials
- c. Strong messaging around your treatment philosophy
- d. Clear differentiation from nearby competitors
- e. Behind-the-scenes content that shows the personality of the practice

3. Tier 3 - Memorable Differentiation: The highest-performing practices go even further by building a brand that is memorable and unmistakably theirs. When this level is achieved, the brand begins doing real work. It builds perceived value, strengthens referrals, and attracts patients who specifically want what your practice offers. Here are the criteria for tier 3:

- a. Clear positioning around what makes the practice unique
- b. Video content that demonstrates expertise and personality
- c. Community involvement that reinforces the brand
- d. Consistent storytelling across the website, social media, and in-office experience

Dominate Reviews

Reviews have become one of the most powerful signals of trust in healthcare marketing.

Patients rely heavily on reviews when deciding which provider to choose. At the same time, search engines and AI tools increasingly use review signals when recommending practices to patients.

Because of this, review dominance has become a strategic advantage.

Practices that consistently outperform competitors in review volume and rating often benefit in several ways:

- They intercept referrals before patients explore other options
- They rank higher in local search and map results
- They build stronger credibility and perceived value

In our framework, a strong goal is to become **review dominant**, meaning you maintain a clear lead over nearby competitors in both total reviews and overall rating.

To do this, practices must intentionally invest in review generation. That includes building systems to consistently ask for reviews, making the process easy for patients, and responding thoughtfully to both positive and negative feedback.

When done correctly, reviews do more than influence reputation. They also reinforce the brand and provide valuable insight into what patients love most about the practice.

Invest in your SEO/SGE Footprint

The way patients discover providers online is evolving rapidly.

Traditional SEO focuses on helping your website appear higher in search results when people search for services you provide. That remains incredibly important.

But search is changing. AI-powered search experiences now generate conversational answers directly in search results before traditional listings appear. These AI summaries pull information from many different sources across the internet.

Because of this shift, practices that invest in high-quality, trustworthy content gain a major advantage.

This is where EEAT becomes critical.

EEAT stands for:

- **Experience**
- **Expertise**
- **Authoritativeness**
- **Trustworthiness**

Search engines and AI tools prioritize content that demonstrates these qualities.

For orthodontic practices, EEAT can be demonstrated through:

- Detailed service pages explaining treatments
- Doctor bios highlighting credentials and experience
- FAQ pages answering common patient questions
- Case studies and before-and-after examples
- Reviews and testimonials reinforcing patient trust

When practices consistently publish helpful, authoritative content, they increase the likelihood of appearing in both traditional search results and AI-generated answers.

Extend Organic Reach for Search Everywhere

The fundamentals of search have changed.

For years, organizations and businesses focused almost entirely on ranking their pages in the top spots on search engines like Google. While these search engines are still incredibly important, they are no longer the only place people search for answers.

Today, potential patients discover providers across many platforms at once. This shift is known as **Search Everywhere**. Search Everywhere describes how people now look for information across multiple platforms rather than relying on a single search engine.

A potential patient might begin by searching on Google, watching a video explaining treatment on YouTube, reading reviews on Google Maps, seeing a practice mentioned in a Facebook group, or asking a question in an AI tool before ever making a decision.

Today, searches commonly happen across platforms such as:

- Search engines like Google and Bing
- AI tools like ChatGPT, Gemini, and Perplexity
- Social media platforms including YouTube, TikTok, Instagram, and Facebook
- Community forums such as Reddit and Quora
- Map platforms such as Google Maps and Apple Maps
- Healthcare directories and review sites

Because of this shift, the practices that win are the ones that show up everywhere patients are looking. **One helpful way to think about this is the “many ponds” concept.** If you only fish in one pond, you catch fewer fish. But if you place your line in multiple ponds, you dramatically increase the number of people who encounter your brand. **In practical terms, that means repurposing content across multiple channels.**

For example, one educational video can become:

- A YouTube video
- Short clips for Instagram or TikTok
- A blog post on your website
- A Google Business Profile post
- An answer to a relevant question on Reddit or Quora

One strong piece of content can power visibility across many platforms. **The goal is not simply to create more content. The goal is to create helpful content once and distribute it widely so patients encounter your expertise wherever they search.**

Invest in a Solid Website UX and Mobile-First Experience

Your website is often the first real interaction a potential patient has with your practice. In many cases, it becomes your digital waiting room. Patients are evaluating your credibility, comparing you to competitors, and deciding whether they feel confident taking the next step.

A great website does more than look good. It removes friction and makes it easy for patients to take action.

One of the most important shifts in modern web design is the move to **mobile-first thinking**. Today, roughly **80% of healthcare website traffic comes from mobile devices**, and in some markets that number climbs closer to 90%. If a site is difficult to navigate on a phone, slow to load, or requires too much scrolling to find key information, many patients will simply move on to another provider.

Strong websites are built with mobile behavior in mind. That means prioritizing clarity, speed, and simplicity.

Another critical factor is making it incredibly easy for patients to contact the practice. Your phone number, scheduling link, and contact options should always be visible. Many high-performing sites use **sticky navigation**, where the header stays visible as users scroll, along with clear calls to action like “Schedule a Consultation” or “Book Online.” These simple elements remove barriers and encourage patients to take the next step.

Equally important is making **service information easy to locate**. When patients arrive on your site, they are often searching for answers to very specific questions. What services do you offer? Is this the right practice for my needs? What happens during treatment? Clear service pages help patients quickly understand whether your practice is the right fit.

Finally, your **differentiators should be front and center**. If your website only explains what orthodontics is, it misses a huge opportunity. Patients want to know why they should choose your practice over the one down the street. Your philosophy, expertise, patient experience, technology, and outcomes should be clearly communicated across the homepage and throughout the site.

When these elements come together, your website becomes far more than an online brochure. It becomes one of the most powerful tools for turning curiosity into consultations.

Strategic Referral Engagement - Dentist Referrals

While Brain Bytes focuses heavily on helping practices build digital authority, our years working in orthodontics have also given us a close view of the offline strategies that consistently support practice growth.

Dentist referrals remain one of the most powerful growth channels in orthodontics. Even in an era of digital marketing, strong relationships with referring dentists continue to drive meaningful patient volume. However, authoritative practices do not treat referrals as passive or automatic. They approach them strategically.

Strategic referral engagement means building intentional relationships with referring dentists and their teams while also measuring referral activity to understand what is working. Tracking who is referring, who has slowed down, and where new opportunities exist allows practices to invest their time and energy more effectively.

Practices that excel in this area often implement a combination of relationship-building initiatives, education, and appreciation. Some of the most successful approaches include:

- **New physician introductions:** When a new orthodontist joins the practice or when a referring dental office brings on a new doctor, proactive introductions help strengthen the relationship early. Visiting offices in person to introduce the new physician ensures referring teams understand the expertise and personality behind the practice.
- **Lunch and learns:** Lunch and Learn events allow orthodontists to share knowledge while building relationships. These sessions often include bringing lunch to the office and presenting on new procedures, treatment approaches, or orthodontic innovations that may benefit their patients.
- **Educational giveaways:** Providing helpful materials reinforces expertise and keeps the practice top of mind. Examples include patient-friendly items like calendars or coloring books, as well as educational materials for dentists, such as case studies or procedure guides that repurpose existing content.
- **Continuing education events:** Hosting CEU events can be one of the most impactful ways to engage referring dentists. While these events require more planning, they position the orthodontist as a trusted expert and create meaningful professional connections.
- **Professional visibility opportunities:** Participating in sponsorships, conferences, or speaking panels can further reinforce credibility and keep the practice visible within the professional community.

- **Thank you notes and outcome follow-up:** Referring dentists want to know what happens to the patients they send. Following up with updates on treatment outcomes and expressing appreciation helps strengthen trust and reinforces the referral relationship.
- **Tracking referral sources:** Finally, strong referral strategies are always supported by data. Tracking referral sources allows practices to see which relationships are growing, which may need attention, and where new referral opportunities may exist.

When approached with consistency and intention, dentist referrals become far more than a marketing channel. They become a network of professional relationships that supports long-term growth and collaboration.

Survey Results:

We started the symposium with a survey to get a pulse check on how orthodontists feel about their marketing. Here are the results:

Branding and Differentiation: “The local market (patients, dentists, parents) can clearly articulate how my practice is different from my competitors”.

- The vast majority of the group agreed with this statement; however, many changed their vote as we began to dig deeper into this topic.
- There was a realization that differentiators such as modern technology, individualized treatment, and friendly/warm team were not as compelling as they thought and that the competitor next door may be calling out similar traits

Community Outreach, Events, and Sponsorships: “Most of our community sponsorships and/or events meaningfully impact awareness and/or leads.”

- While more people disagreed on this topic, the room was more closely split

Dentist Referral Engagement: “We have a clear, intentional, measured DENTIST referral engagement strategy that works to drive consistent dentist referrals.”

- Most of the audience disagreed with this statement

Reviews and Reputation: “We are excellent at consistently generating positive Google reviews”.

- Most of the doctors agreed with this statement

Digital Authority - SEO/SGE, AI Search, Search Everywhere: “We regularly produce digital content that demonstrates Experience, Expertise, Authority, and Trustworthiness (EEAT)” + “We regularly produce video content.”

- Most of the crowd disagreed

Traditional Marketing (Radio, Billboards, TV/Streaming, Direct Mail): “Traditional marketing (radio, billboards, TV/Streaming, Direct Mail) has been effective for our practice in recent years.”

- The vast majority of the audience disagreed

Patient Referrals: “Patient to patient referrals happen by design in our practice - not by accident.”

- The vast majority of the audience disagreed

Orthodontists are doing many of the right things already, but the biggest opportunities lie in making those efforts more intentional and measurable.

Reviews are strong across most practices, which is a great foundation. The gaps appeared in areas that require more structure and strategy, such as referral systems, digital authority, and evaluating the real impact of community outreach.

Real-World Lessons from Orthodontists

One of the most valuable parts of the seminar was how openly doctors shared what is actually happening inside their practices. Not theory. Not fluff. Real wins, real frustrations, real experiments, and real lessons.

Across different markets and practice sizes, many of the same growth patterns showed up again and again. The practices gaining momentum were not necessarily doing everything. Instead, they were focusing on a few foundational strategies with more intention, more consistency, and a clearer understanding of what patients, parents, and referral sources actually respond to.

Below are some of the most powerful lessons shared by the doctors in the room.

Topic 1: Patient-to-Patient Referrals (Designed, Not Accidental)

Many practices assume that patient referrals will naturally happen if patients are happy. While satisfaction is certainly important, the doctors in the room shared a

powerful realization: **the strongest patient referral systems are intentionally designed.**

The practices seeing the most success were not broadly asking every patient for referrals. Instead, they focused on identifying people within their patient base who already have influence and creating opportunities for those individuals to advocate for the practice.

These influential community connectors often include:

- PTA leaders and school committee members
- Coaches and teachers
- First responders such as firefighters
- Parents deeply involved in school activities
- Patients with strong social media followings

Rather than asking these individuals for referrals directly, successful practices focus on **relationship activation**. They build meaningful connections and create moments where advocacy happens naturally.

Several examples stood out during the discussion.

- One orthodontist shared a strategy focused on PTA leaders. The practice intentionally identified PTA members and invited them to coffee, positioning the conversation around supporting the growth of the PTA rather than promoting orthodontics. The practice offered discounts to PTA families and carefully tracked results. Over two years, this strategy generated **more than 500 new patients**.
- Another practice hosted a **patient appreciation dinner at a high-end steakhouse**, inviting only patients who had already expressed strong loyalty and advocacy. These patients were given referral cards as a way to reinforce the behavior they were already demonstrating.
- Generosity also played a role. One practice offered **free retainers to firefighters**, recognizing the strong internal networks within fire departments. Instead of explicitly asking for referrals, they encouraged firefighters to share their experiences with colleagues.
- Social media interactions also revealed unexpected opportunities. One orthodontist discovered that a patient had a large online following simply through regular engagement on social platforms. Rather than pursuing formal influencer marketing, the practice strengthened the relationship organically.

The key takeaway was clear: **referrals grow fastest when practices focus on relationships, not requests.**

Topic 2: Patient-to-Patient Referrals (Designed, Not Accidental)

One of the most eye-opening moments during the seminar came when doctors began discussing how their practices stand apart. Initially, many believed they had strong differentiation. But as the conversation deepened, several realized their messaging sounded almost identical to nearby competitors.

Statements like “we treat patients like family,” “we care deeply,” or “we use advanced technology” were meaningful values, but they were not unique.

The doctors who seemed to stand out in their markets had translated their values into **visible, repeatable experiences.**

Some practices differentiated themselves through **the patient experience.** One orthodontist described how every step of the consultation process was clearly explained and branded so patients always knew what to expect.

Another practice realized that their consultations were unusually detailed and educational. They began leaning into this strength by highlighting the depth and clarity of their treatment planning, which resonated strongly with second-opinion patients.

Several other branding approaches emerged during the discussion:

- Hiring a **dedicated community liaison or internal PR coordinator** to represent the practice in local schools and parent groups
- Creating **billboard campaigns tied to patient participation**, where patients entered contests, and the winner appeared on a billboard
- Investing in **high-quality, trend-driven swag** that patients genuinely wanted to wear
- Producing **authentic video content**, such as “day in the life” series showing the real practice culture

One doctor summarized their approach simply:

“What is the best version of my authentic self, and how do I project that consistently?”

Another insight was that **messaging determines the audience you attract.**

Practices that clearly communicate quality, expertise, and experience tend to attract patients who value those traits and are less focused on price.

Topic 3: Community Engagement, Sponsorships & Events

Community outreach remains one of the most powerful ways orthodontic practices build long-term visibility and trust. However, the doctors emphasized that not all sponsorships or events produce meaningful results. The difference comes down to **ownership, consistency, and data capture**.

Practices that saw the strongest return tended to design events where they controlled the experience and collected contact information from participants.

Examples shared included:

- Bounce house events where participants signed waivers that captured contact information
- Santa photo events, where pictures were sent to families via text
- Coloring contests distributed through schools and newspapers that required families to visit the practice to submit entries

Other practices focused on **long-term visibility within their community**.

High school sports sponsorships were frequently mentioned, including:

- Ads in football programs
- Banners at games
- Scoreboard sponsorships

While these initiatives did not always produce immediate conversions, they created broad household awareness over time.

Some practices created signature community events. One orthodontist shared a **“Shoes for Smiles” initiative** where 150 children from the Boys & Girls Club were taken shopping for new shoes. The event created meaningful goodwill and strong community visibility.

Another practice developed a youth run club event with more than **1,000 participants each year**. While it took several years to gain traction, the event now generates significant community recognition.

Interestingly, some sponsorships produced unexpected opportunities. One practice sponsored a semi-professional soccer team, which did not generate many direct leads but eventually led to exclusive access at youth soccer tryouts, where the practice could meet families and book consultations.

Across all examples, the most successful initiatives shared several characteristics:

- Consistent community presence over time
- Meaningful experiences rather than simple logo placement
- Clear methods for collecting contact information
- Systems for tracking how patients discovered the practice

Topic 4: Dentist Referral Engagement

Dentist referrals remain a cornerstone of orthodontic growth, but the practices receiving the strongest referrals approached these relationships strategically.

Rather than competing with dentists, successful orthodontists focus on **reducing friction and increasing collaboration**.

Many of the strategies shared centered around simple but consistent relationship building.

Some examples included:

- Tracking dentists' birthdays and sending thoughtful gifts
- Delivering food or treats to offices regularly
- Building relationships with front-office teams, who often influence referral decisions

One orthodontist became locally known as the **“chips and salsa orthodontist”** by regularly dropping off homemade salsa at dental offices.

Another powerful lesson involved collaboration around clear aligners. Instead of competing with dentists offering aligner treatment, one orthodontist approached a dentist and asked how they could support better patient care. Over time, the dentist decided to stop offering aligners and began referring those cases to the orthodontist.

Several practices also hosted **large appreciation events for referring offices**, including catered lunches or harvest festivals where dentists, their teams, and families were invited.

To manage relationships effectively, many doctors use **tiered referral systems**, grouping dentists into A, B, and C categories based on referral volume and engagement.

At the same time, several speakers cautioned against abandoning low-volume referral sources too quickly. Some relationships take years to mature and can suddenly become significant referral sources.

The common thread across all of these approaches was intentionality. Successful practices track referral patterns, invest where relationships are growing, and continue nurturing connections over time.

Conclusion: Turning Insight Into Action

The conversations that shaped this playbook reinforced an encouraging truth: **there is no single “secret tactic” behind orthodontic practice growth.** The practices gaining momentum are not necessarily the ones doing the most marketing. They are the ones approaching their growth with greater clarity and intention.

Across the seminar discussions, the same pattern appeared again and again. Practices that are building authority in their markets are strengthening a few core pillars: a brand that clearly communicates who they are, a strong digital presence where patients are already searching, intentional systems for patient and dentist referrals, and meaningful engagement within their communities.

For POP members, the opportunity ahead is not to overhaul everything at once. Instead, it is to look at the strategies in this playbook and identify the areas where small shifts in consistency, measurement, or focus could create meaningful lift.