

— FOR BUYERS &amp; OWNERS

# 5 Tips for a Successful Dental Practice Visit

The visit is where the numbers meet reality. Here is how to make every walk-through count — and avoid the surprises that show up after closing.

Bergquist Group Insights • **Practice Transitions**

Whether you are touring a practice you might buy or simply walking through your own with fresh eyes, the visit is where the numbers on paper meet reality. A spreadsheet tells you what a practice earned. A good visit tells you why — and whether that performance is likely to continue once you are the one in the chair.

The difference between a casual walk-through and a productive one comes down to preparation and attention. Below are five things that consistently separate buyers who make confident decisions from those who get surprised after closing.

**1**

## Come with a written agenda

Decide before you arrive what you need to learn: patient flow, equipment condition, staff dynamics, the physical layout. A practice visit is short and easy to fill with small talk. A simple checklist keeps you focused on what actually drives value, and signals to the seller that you are a serious, prepared buyer.

**2**

## Read the operatories, not just the front desk

The reception area is staged to impress. The back is where the truth lives. Look at the age and condition of chairs, units, and imaging equipment. Note whether the practice is digital or still film-based, the state of the sterilization area, and how many operatories are actually plumbed and usable versus simply present. Deferred maintenance is a real, quantifiable cost you will inherit.

**3**

## Watch how the team moves

A practice runs on its people. During a visit, observe whether the staff seem comfortable, communicative, and busy in a healthy way — or stretched, tense, and reliant on the owner for every decision. Staff continuity after a sale is one of the biggest predictors of a smooth transition. The energy in the room tells you things the financials never will.

**4**

## Ask about the patient base, specifically

Total patient count is a vanity metric. What matters is the active patient base — those seen in the last 18 to 24 months — along with new-patient flow, recall and hygiene reappointment rates, and payer mix. A practice with strong recurring hygiene revenue and a balanced insurance mix is far more durable than one chasing one-time, high-production cases.

5

## Picture yourself in the room

Beyond the numbers, ask the honest question: can you see yourself practicing here for the next decade? Consider the location, the commute, the community, the clinical philosophy, and whether the existing patients are the kind you want to serve. The best financial deal in the wrong setting is still the wrong deal.

### THE BOTTOM LINE

A practice visit is a diligence tool, not a formality. Treat it like one. The hour you spend paying close attention can save you from years of expensive surprises — or confirm that the opportunity in front of you is exactly as good as it looks.

This article is general educational information for prospective dental practice buyers and owners and does not constitute legal, tax, or financial advice. Every practice and transaction is unique; consult qualified advisors before making decisions.

### Touring a practice soon?

We help buyers evaluate practices the right way — and represent sellers who want a smooth, well-documented sale.

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