

## — FOR FOUNDERS

# Checklist for a Dental Practice Start-Up

Building from scratch means creating a business and a patient base at once. Here is how to plan a start-up stage by stage — from feasibility to launch day.

Bergquist Group Insights · **Practice Transitions**

Building a practice from scratch is the most personal path into ownership. Every decision — the location, the layout, the name on the door — is yours. It also carries the longest runway to profitability and the steepest learning curve, because you are creating a business and a patient base at the same time.

A start-up rewards careful planning more than almost any other venture. Here is how to approach it stage by stage.

## Foundation and feasibility

- ✓ **Run a demographic and competition study.** Understand the population, income levels, insurance landscape, and saturation of providers in your target area before committing to a location.
- ✓ **Build a realistic business plan.** Project your ramp-up honestly. Most start-ups take 18 to 36 months to reach mature production — plan your personal finances accordingly.
- ✓ **Secure start-up financing.** Lenders offer specific dental start-up loan products. Know what they cover: build-out, equipment, working capital, and the cushion to survive the early months.

## Location and space

- ✓ **Choose the site strategically.** Visibility, accessibility, parking, and co-tenancy all influence new-patient flow. This is a long-term commitment — treat it like one.
- ✓ **Negotiate the lease carefully.** Tenant improvement allowances, free-rent periods during build-out, renewal options, and exclusivity clauses are all on the table. The lease you sign shapes your cost structure for years.
- ✓ **Consider whether to buy instead of lease.** In some submarkets, owning your space can convert rent into equity. It is worth running the numbers before defaulting to a lease.

### A START-UP ADVANTAGE

Unlike a practice purchase, a start-up lets you design everything around modern, efficient workflows from day one — digital systems, an optimized floor plan, and a brand built for the patients you actually want. The trade-off is time. You are building demand, not buying it.

## Build-out and launch

- ✓ **Assemble your project team.** A contractor, equipment specialist, and dental-experienced designer who have done this before will save you costly missteps.
- ✓ **Plan equipment and technology.** Balance what you need on day one against what can wait, and design for the practice you intend to grow into.
- ✓ **Handle licensing, credentialing, and compliance.** Insurance credentialing in particular can take months — start early so you can bill from the day you open.
- ✓ **Invest in marketing before you open.** A start-up has no patient base. Your launch marketing — brand, web presence, and local outreach — is what fills the schedule.

A start-up is a marathon with a slow first mile. The owners who succeed are the ones who planned their finances, their location, and their launch with discipline — and who surrounded themselves with advisors who had walked the path before.

This checklist is general educational information for dentists considering a practice start-up and does not constitute legal, tax, or financial advice. Consult qualified advisors for guidance specific to your situation.

### Planning a start-up?

From site selection to lease-vs-buy analysis, we help founders make the real-estate decisions that shape a new practice.

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