

GOODWILL = SELLER TRUST + PATIENT LOYALTY + TEAM STABILITY

Protect the value you just purchased by preserving the relationships that drive collections.

COMPONENT	✓ DO	✗ DON'T
 SELLER TRUST Goodwill starts before closing. Preserve trust with the seller to secure a smooth handoff.	✓ Use collaborative, win-win language throughout negotiations. ✓ Lock in a 3–6 month transition, patient introduction letter, and personal endorsement. ✓ Respect the seller's legacy and ask about their vision for the practice. ✓ Document every agreement before signing the LOI or Purchase Agreement.	✗ Lead with a lowball offer that damages goodwill. ✗ Get distracted negotiating furniture and minor cosmetic items. ✗ Let emotions outweigh due diligence and the numbers. ✗ Assume verbal promises will be honored without documentation.
 PATIENT LOYALTY Patients stay when relationships stay. Earn their trust before you make changes.	✓ Have the seller personally introduce you for the first 3–6 months. ✓ Send a co-signed patient transition letter before Day 1. ✓ Personally contact your top 50–100 patients early in the transition. ✓ Keep the patient experience consistent before making major changes.	✗ Rebrand or overhaul systems immediately. ✗ Raise fees or change policies too quickly. ✗ Speak negatively about the previous owner. ✗ Assume patients will stay simply because they liked the seller.
 TEAM STABILITY Your team drives the patient experience and business performance. Keep them engaged and confident.	✓ Meet with the team on Day 1 and communicate openly. ✓ Listen first before implementing new systems. ✓ Reinforce job security and your long-term vision. ✓ Preserve key team members and office traditions while learning the practice.	✗ Replace employees unnecessarily. ✗ Introduce sweeping operational changes in the first few weeks. ✗ Allow uncertainty or rumors to spread. ✗ Ignore staff concerns during the transition.

TARGET METRICS (FIRST 12 MONTHS)



PATIENT RETENTION
90–95%+
of active patients retained



TEAM RETENTION
90%+
of key employees retained



PROVIDER PRODUCTION
Return to (or exceed) the seller's trailing 12-month production within the first year



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Practice Sales
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