

Somerville Orthodontics **boosts patient exam volume by 10% in first 90 days** with Adit



Meet Somerville Orthodontics

Located in the heart of Somerville, Boston, Somerville Orthodontics is led by board-certified orthodontist Dr. Moonyoung Lee. Passionate about technology, precision, and delivering beautiful, healthy smiles, Dr. Lee has proudly been voted Boston Magazine’s Top Dentist two years in a row. Office Manager Laryssa first discovered Adit and brought it to Dr. Lee after recognizing the growing operational strain behind the scenes. After a full platform walkthrough, the decision was immediate. That was three months ago, and the team has already felt the impact Adit brings to their daily operations.

Challenges

- Managing four separate systems that didn’t connect with Cloud 9
- Staff had to manually send and check appointment reminders
- They could not tell if incoming calls were from new or existing patients.
- Multi-step digital forms process that slowed check-ins
- Generating zero patient reviews despite growth goals

Results

10% Increased patient exam volume	5-6 Generated new patient referrals per month	1+ Hour/clinic day Saved by automating reminders and confirmations
30% Boosted appointment confirmation rates	 Reduced monthly software costs by consolidating three vendors into one integrated platform	

Once I saw how Adit could integrate everything into one system that actually talks to our practice management software and how much stress it would save my team, it was a no-brainer. We didn’t even look at other companies. Adit just made sense for efficiency, cost, and overall value.



Dr. Moonyoung Lee
Practice Owner

Life before Adit

Before using Adit, the practice depended on four different vendors: Nextiva for phones and texting, Open Edge for payments, and another company for digital patient forms. None of these systems worked well with Cloud 9, so the team had to update records by hand and switch between platforms all day. They sent appointment reminders manually, and review requests were not sent regularly. Patients filled out digital forms on one iPad in the office, and staff had to upload them manually. The team also could not tell if a caller was a new lead or an existing patient.

I didn't even know we were having operational struggles because my team just handled it," explained Dr. Lee. "But once they showed me how much manual work and frustration were involved with updating Cloud 9, switching between tabs, and answering calls blind, I realized we needed a change.

Adit to the Rescue

In just 90 days, Somerville Orthodontics began seeing measurable improvements across efficiency, reputation, and patient volume. Adit unified the practice's communications, forms, phones, payments, and review generation into one fully integrated system. The transition was seamless, including porting over their existing phone number. Automated missed call texts began capturing potential leads instantly. Appointment reminders and confirmations became fully automated and synced directly into Cloud 9. Digital forms were sent via text before appointments and flowed directly into the PMS, and the team could finally stop the bulk of their manual entry processes.

"Adit has allowed my team to stop worrying about the little day-to-day things that take up so much time," said Dr. Lee. "Instead, they focus on patient care. It's become a real, integrated part of our practice."

The Transformation

01 30% Higher Appointment Confirmation Rates

Before Adit, the team spent about an hour each clinic day manually sending reminders and checking confirmations. Upgrading their PMS for automation was too expensive. Now, with Adit, reminders are sent automatically a few days before and on the day of the appointment, and confirmation status updates in real time.

"Now everything auto-confirms and updates automatically," noted Dr. Lee. We don't have to verify anything manually. Our confirmation rates are up about 30%, and we're saving at least an hour each clinic day."

02 From Zero Reviews to 5-6 Per Month

Before Adit, the practice struggled to generate online reviews consistently. Despite aiming for two per month, they were receiving virtually none. With Pozative automated review requests sent immediately after appointments, that changed quickly. This steady review growth strengthens their online presence and supports continued patient acquisition in Boston's competitive market

"The reviews have been unexpectedly valuable," noted Dr. Lee. "We're consistently adding 5-6 per month now. Before Adit, we were getting zero."



Somerville
Orthodontics



03 10% Growth in Exam Volume

One of the most notable early outcomes has been a 10% increase in patient examination volume just three months after implementation. Dr. Lee attributes this growth to improved efficiency, stronger communication, and better lead management through integrated VoIP and automated missed-call texting. By eliminating friction in daily workflows, the team unlocked capacity for growth without adding overhead.



"Because we're more efficient and not bogged down in manual processes, we can handle patient calls better and manage leads more effectively," said Dr. Lee. I believe that has partially contributed to the 10% increase we've seen in exams."



04 Consolidation That Saves Time and Money

Somerville Orthodontics used Nextiva for VoIP, Open Edge for payments, a third-party digital forms provider, and separate texting systems, all of which were disconnected from Cloud 9. Adit consolidated those systems into one integrated platform, reducing vendor complexity and monthly expenses.



"We've streamlined everything on our computers and consolidated three different systems," concluded Dr. Lee. We're saving money each month, and everything actually talks to each other now. It's efficient, and honestly, it just makes sense."



Over the next year, the practice plans to transition fully to Adit Pay, launch telehealth services, and implement Adit's AI Front Desk Agent to make administrative tasks easier.