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An Eye on the Future

By Jake Puhl

Within dentistry, change is constant. This issue's cover story is a case in point. This September, North American Dental Group announced that Jonathan Walker will take over as chief executive officer. He succeeds Ken Cooper, an NADG co-founder who led the company since its inception in 2008 and successfully grew NADG from a single clinic to be one of the nation's leading DSOs supporting 250 locations across 15 states.



"This is a tremendously exciting time for NADG," Walker told us. "We are in a great position to build on foundational improvements we've made within the business during the pandemic, pursue scalable growth opportunities, and provide additional supports for our doctors and offices. And we have a plan to get there."

You can read all about NADG's plan in this issue's cover story.

Change, and growth. Those are two themes we've seen among the industry's leading dental service organizations throughout our first year publishing *Dental Group Practice Magazine*. In 2021, we had a front row seat to pick the brains of the best and brightest among the dentist entrepreneurial community on a wide range of topics including acquisitions, de novos, leadership, culture building and more.

And we're just getting started. We believe there is an entire world of resources, people, and ideas existing right now that most dentists do not know about. Through The DEO, and this magazine, we want to open up that world to the industry's dentist entrepreneurs, and connect and build a community of like-minded dentists and dental executives in your position, going through the same issues you are encountering who are surrounded by the best education and resources.

To that end, beginning with the first print issue of 2022, we will officially rebrand the publication to *DEO Magazine*. We believe this will help us reach a wider audience to continue spreading positive messages, stories, and education in the group space and continue to help dentists and executives fulfill their future visions.

There's a lot to look forward to in the coming months. Stay tuned!

Jake Puhl

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Future Trends 2022

Dentists leading the charge : BY ANDREW SMITH, EXECUTIVE DIRECTOR, ADSO

A deeper appreciation for the mouth-body connection will be the defining trend for our industry in 2022.

Simply put, the mouth-body connection is the idea that what happens in the mouth affects a person's overall well-being. Like eating healthy and taking care of one's mental health, people also need to maintain proper oral health. For years, the dental industry has understood that dentistry is integral to health care, as opposed to a separate function.

Now, due to the diligence and commitment of dentists during the COVID-19 pandemic, we're seeing a larger recognition of the mouth-body connection throughout the greater health care landscape. One example of health and dental integration is the visibility of oral care, as the industry has embraced teledentistry and the ability for dentists to administer vaccinations.

Dentistry – like other industries – has experienced immense changes throughout the COVID-19 pandemic. In the early days, dental offices were shuttered while oral health care temporarily paused – people were delaying dental appointments

and paying less attention to their dental hygiene.

Yet, despite the challenges over the past year and a half, dentists have shown up for their communities, driving recognition of oral health and the importance of access to care. With the emergence of COVID-19 vaccines, there was a lack of health professionals who were able to administer shots. Dental hygienists stepped up – 20 states thus far have authorized them to administer the shots. By elevating dentistry and improving access to care for urban and rural communities, the industry demonstrated the significance of oral health and its ties to overall

wellness, an ongoing trend for the dental profession.

Speaking of the future, the ADSO had a phenomenal time at Leading the Evolution of Dentistry. It was a delight to meet with ADSO members and discuss the ADSO's 3-year strategic plan that emphasizes the mouth-body connection, promotes access to care and elevates dentistry.

Looking ahead, the ADSO looks forward to continuing to advocate for and advance policies that allow a dentist to prioritize patient care. We have spent a significant amount of time working with the ADA on multiple policy issues that are important to the oral health care community. On the federal level, we continue to engage with key policymakers on Capitol Hill, the White House and agencies to promote access to care and continue to elevate dentistry as essential health care.

As we rapidly approach 2022, we're watching how technology shapes the industry, the impact of growing the DSO employment pipeline, and the implications of health care and dental insurance integration. Until then, the ADSO is charting a path forward for the dental industry. ■





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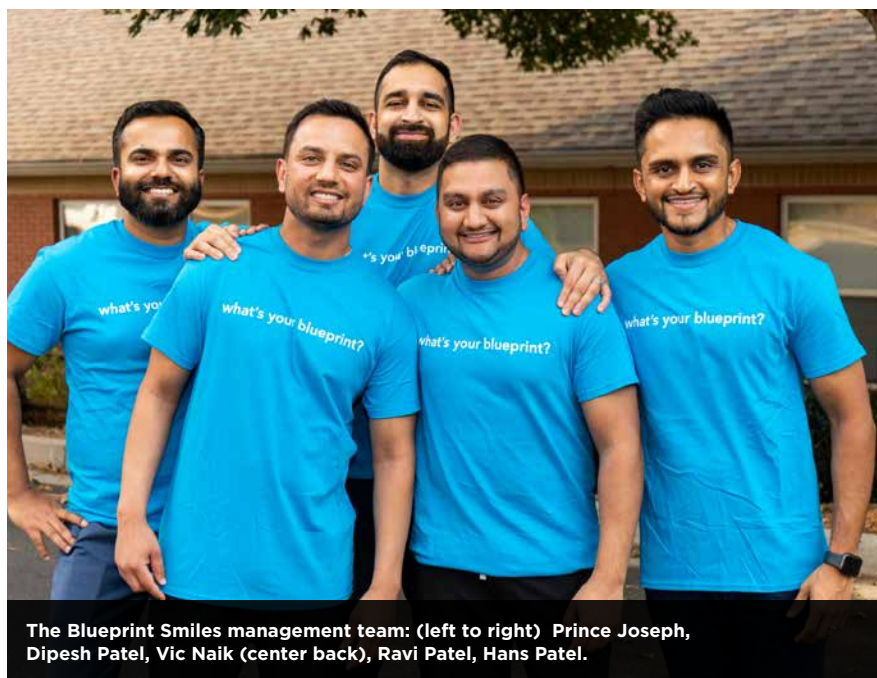


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Getting By with Help from Your Friends

The story of **Blueprint Smiles** : By Pete Mercer

Success in any industry doesn't typically happen without some help along the way. Collaboration is a huge part of success, and finding a supporting partner is a crucial step in any journey. For the dental industry, support can come in a number of different ways. For Dr. Dipesh Patel, it came in the form of Blueprint Smiles, a DSO he started to help practices grow.



The Blueprint Smiles management team: (left to right) Prince Joseph, Dipesh Patel, Vic Naik (center back), Ravi Patel, Hans Patel.

Blueprint Smiles started about 8 years ago. Dipesh had just finished dental school and purchased a practice, but he had very little experience and no knowledge of what to do next. He reached out to some friends from his years as an undergrad to build a website to help his business grow. Dipesh said, “I put a team together and said, ‘Hey, I’ll pay you guys based on profit that we have. Help me create this.’ I knew I couldn’t be the only one that was going to be in

this boat, buying a practice and paying student loans.” Dipesh used the services that Blueprint Smiles offers to help grow his original practice.

Dr. Ravi Patel, who serves as the Chief Operating Officer and Clinical Director for Blueprint, was Dipesh’s roommate in dental school, and was in a similar situation with his experience. Dipesh convinced Ravi to buy a practice as well, promising to help him get started. “I told him, ‘Well, I’ve already messed up about a year.

I will make sure you don’t mess up for at least that same time period.’ So, he technically became our first client.” After growing his practice, Ravi joined the team at Blueprint. Dipesh pushed his team to move into acquisitions. With an IT specialist, a lawyer, and an operations specialist, Dipesh and Ravi started growing Blueprint Smiles by purchasing three more practices.

Ravi described the motivation for growing Blueprint Smiles, saying, “These practices that we grew, they were grown with the intent to make our own lives easier. We built these organizations to serve us and give us a quality of life that we could enjoy, which embodies our motto ‘Work, Life, Thrive’. Once we got these organizations to where we felt like they were successful, we knew that we weren’t the only ones that could go through this process of practice growth. If two guys that probably aren’t the smartest guys in the room can do it, there have to be other folks out there we can help support.”

Ravi and Dipesh wanted to replicate their success for other dentists, partnering with them in order to give them the same quality of life and success they had both experienced. This approach is what makes Ravi and Dipesh unique in the industry. They developed a formula that not only works for who they are and what they do, but they have proven that it works within their own practices.

The pursuit of personal and professional growth

With five practices across the metro-Atlanta area, Blueprint Smiles consists of five founders (two of which are dentists). Dipesh likens the organization to five friends who have created a fun project together. Every dentist that partners with Blueprint has the opportunity to hit certain benchmarks, which will trigger a clause that allows them to buy their practice within a few years. “We offer true ownership at the practice level, as far as equity goes,” he said. “We want our practices to feel like they are individual private practices. They aren’t even branded as Blueprint Smiles, they are labeled Marietta Dental Professionals, Buford Family Dental, Riverwood Dental, DentalCare Acworth, and Elegant Smiles.”

Blueprint’s model is intended to facilitate a thriving personal and professional life. They have created a professional and fun environment for the team so that work doesn’t feel like work, so in turn, dentistry doesn’t feel like dentistry. Dipesh said, “We don’t believe in work-life balance. We hate the word balance. We believe that both elements should thrive, without making sacrifices on either side.”

Dipesh said Blueprint Smiles is dedicated to being a PSO (People Support Organization), “where we support our people who indirectly support our patients. It ties into the personal and professional growth and core values,” he said. “We may do things that DSOs do on the management side, but our true philosophy is supporting our people.”

A focus on employee engagement and creating a culture that will encourage retention and productivity has paid off for Blueprint’s success. “Our premise was to create an organization around that idea where people would feel enriched in both areas of their life, which ultimately leads to happier individuals that are more productive personally, professionally, and more active in their community.”

A practice run by core values

Blueprint Smiles has a foundational set of seven core values that guide patient interactions and business decisions. Dipesh explained how Blueprint Smiles has implemented their core values to improve the work culture and better develop their team.

1 Respect time – Time is a fleeting and finite resource, making it invaluable to every one of us. Blueprint’s team understands the value of time and what it can mean for the organization, the patient, and the individual team members.

2 Me to we – Blueprint runs their operations with a “we” mindset. Because they operate as a team, they work to facilitate an environment with no ego involved. Dipesh said, “We’re better together.”

3 Perpetual growth – Growth is essential to fostering employee engagement. Blueprint wants their team members to grow professionally and personally. Dipesh explained, “We want everyone to remember that it’s very important to grow in both aspects, personally and professionally. Whether it’s time management,

sleep, or their relationships with their kids. All of it matters.”

4 Do the right thing – Working with integrity and honesty is another essential part of working with Blueprint Smiles. “Everyone goes chasing things they don’t even know they’re chasing, but they’re not really doing it for the right reasons. They think it’s going to lead to growth. So they chase the bigger practice, the bigger number, the fancier car. All to see if it’s going to make them happy, but in the process, they might not be doing the right thing. We want our team to do the right thing right that’s going to make you happy and give you joy.”

5 Be grateful – “We practice gratitude through and through. We are in a blessed country with blessed circumstances. Whether things are going well or not, we still have a roof over our heads, and a job with teammates that care about us. So be grateful for the little things.”

6 Cultivate happiness for you and others – Happiness is a choice. Making that choice for you and your patients is a great way to improve patient care and your connection with your team. Dipesh said, “Make sure you’re doing things to make yourself and others happy.”

7 Become leaders – Finally, Blueprint is working to develop leaders. “Become leaders at home, at work, and in your community. Make sure you’re growing as a person. You don’t have to be the CEO to be a leader.” ■

Virtual Teams

Selecting a Winning Combination : By J.W. Oliver Jr.

Outsourcing, insourcing, off-shoring, remote/virtual workers; the popularity continues to grow. Market conditions in the United States continue to evolve and sourcing in-office team members has proven to be a difficult process given the lack of quality resources and the shift upwards in salary and wages, and benefits.

Developing a concise plan, setting clear objectives, and integrating into your culture, are keys to success with remote teams. We will outline key points when working with your new remote teams for any number of roles or positions:

- › Centralized Services
- › Revenue Cycle Management
- › Director of First Impressions
- › Insurance Claims/Verifications
- › Scheduling
- › Reactivation of Patients
- › Re-Care
- › Marketing
- › I.T.
- › Executive Assistant

1 Identify Your Needs

The first step is identifying your current and forecasted needs and any additional roles that could be outsourced more efficiently outside of your office. Most positions can now be effectively outsourced. No, not the dentist, hygienist or chairside assistant, but so many others can be a great fit as a virtual team member.

2 Video Interviews

It's important to do video interviews of each candidate. At SupportDDS, we thoroughly vet our trained dental teams before they get to your interview. We recommend interviewing three people to affirm they're the right fit to integrate with your existing team. Typically, these candidates can be interviewed in as little as 20 minutes each or one hour total. Get to know



them, hear their voice, develop that first impression! Some tips:

- › Smile, even get them to laugh. They will be nervous.
- › Have a prepared list of 3-5 questions.
- › Discuss their long-term goals and life plan.

3 Onboarding/Training and Tools

The onboarding process should be a time to set clear expectations on measurements and roles. Designating



them in. Celebrate monthly birthdays, and include them. Bonuses for meeting key objectives? Let them participate! The more you bring them in, love on them, and make them feel at home, the greater level of success you will experience.

5 **Reporting and KPIs**

Don't complicate the reporting. As you develop your teams, you can advance the metrics to a higher level as their confidence builds and you become more comfortable delegating more key objectives. Setting clear daily/weekly goals, developing a concise reporting mechanism to measure, and spending time each day will ensure the success of your team. No CRM or reporting format? Not an issue. There are numerous tools and apps to utilize that will keep the objectives squarely in front of you; such as Dropbox, Google Docs, Trello, Monday.com.

Setting clear daily/weekly goals, developing a concise reporting mechanism to measure, and spending time each day will ensure the success of your team.

a time to work with your remote team each day for the first 10 to 15 days is important to have everyone on the same page.

4 **Integrate into Team Culture**

Make your remote team members feel a part of the culture! If you have a regular weekly huddle, Zoom

6 **Elevate Your Team**

Once your in-office team understands you are working hard to elevate them and overcome the fear that you're trying to replace them, they'll embrace the new remote team. This will allow them to target high priority/ROI items, and increase their passion for their role as they focus on aspects they enjoy. Ready, Set, Grow! ■

J.W. Oliver Jr. is the Managing Partner for SupportDDS.com and ZimWorX.com.

Their mission is: "A Commitment to Excellence while making a Global Impact for the Kingdom."

Choose Your Path

Six Entrepreneurial Pathways to Grow and Operate Your Dental Group : By Dr. Eric J. Roman

Dentists are typically, by nature and design, super intense engineers working in micro-millimeters of detail, which can make it hard to have perspective in what we need to do to manage the business side of dentistry. A lot of the skills that make us great dentists can also complicate our transition into the entrepreneurial journey.



Dr. Eric J. Roman

After I graduated from dental school in 2007, I built one of the fastest growing practices in the country. We made \$2 million in revenue in the first year, \$4 million in the second year, and \$6 million in the third year. Not even 18 months into being a private practice dentist, I had multiple locations. Each new location was growing faster than the one

before it. Things were going great, right up until they weren't.

I ended up in a multi-year, multi-million dollar regulatory lawsuit in North Carolina. Long story short, I lost everything. But I was not done, and I was not giving up. Real entrepreneurs have this tendency towards serially building businesses, learning how to do so along the way.

CarolinasDentist was born out of the ashes of my first DSO experience, and over the course of 5 years, we grew it to nearly \$30 million in revenue when I recognized that it was time for a change.

We often have a belief that we only have one path, and it is going to span our whole career. I realized that CarolinasDentist did not need to be my only journey. While I was grateful for the experience, being authentic to who I was meant that it was time for me to step out of that journey and to create space for everyone else to continue growing. In 2019, a private equity-backed exit allowed me to refocus my energy into a number of other endeavors, including my contribution to the Dentist Entrepreneur Organization.

All that to say, there are multiple paths for entrepreneurs to find success in the dental industry. I am a living testament to the fact that these journeys will hardly ever go forward in a straight line. As a matter of fact, I would like to argue that straight paths are neither likely, nor are they fun. Part of what I do now is informing dentists, both young and old, about the power of choosing your own path. Your path might not look like any other. It's just yours, and it's based on your skills, your passions, and your unique life.

Patterns of success

Of course, there are some general patterns of success that we should

consider. History provides plenty of examples of dentists that have built incredible companies using any variation of these 6 core entrepreneurial pathways. Each of these pathways requires completely different experiences and skills to succeed, but that is the beauty of it! You are choosing your experience. You pick what you want to go through because there is no one right answer. Choosing what works for you allows you to develop your brand in a way that reflects your values, vision, and goals.

1 Solo practice on cruise control

There is a myth that being a dental entrepreneur means having

multiple locations. Please don't fall for this trap, as this could not be further from the truth! You can put your solo practice on cruise control by building processes and efficiencies that take you out of the mundane day-to-day tasks, whether mundane to you means clinical or administrative. Efficiencies minimize the amount of time that you have to contribute and maximize the output of what you enjoy doing most, whether it's training other clinicians, rendering exceptional care, or focusing on how to create a more attractive practice.

Many of the happiest dental entrepreneurs I know are exceptional

solo practitioners. They are proud of who they are and what they deliver as a product. Instead of spending tons of energy (and capital) on more locations and more problems, they focus on one great location. Some focus their time on clinical innovation. Others put their energy toward unique, boutique patient experiences. And still others leverage the efficiencies they've created to become speakers and key opinion leaders for the industry. The key here is to recognize that being the only doc at a single office address might be a viable path for your continuous entrepreneurial growth.



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2 Multi-doctor, single location

In a multi-doctor, single location practice, your responsibility might be more focused on developing other doctors without having to worry about spending time in the chair. You can focus on generating revenue, developing your team, and strengthening your company culture. The multi-doctor, single location group can be one of the most efficient ways to step away from your business and be able to have something that really provides for you. It is ideal for the kind of person that is OK with not being hands-on and providing all the care for your patients. It's also ideal for dentists that have a penchant for training other dentists. Compared to multiple locations, this is efficient because there are fewer variables, lower overhead, and only a single team to manage.

cohesiveness and camaraderie of a single team at one location.

3 Multiple locations

If your greatest skillset is not necessarily what you do with your hands, but has more to do with how you manage, develop, and grow other people, then a multi-location approach might be the best journey for you. Not everyone is gifted with the ability to manage multiple locations and dozens of employees. Because that skillset is completely different than that of a traditional dentist, your success in multi-location group dentistry has nothing to do with the years that you spent in dental education.

With a multi-location approach to building your dental practice, you could be managing practices that are 50 to 200 to 2,000 miles away from one another. The leaders that excel

4 CEO or COO

Regardless of the growth strategy you choose for your business, you still have to isolate your ideal role in that business. Inevitably, the majority of founding entrepreneurs insert themselves into the CEO role...but is this the right choice? Are you gifted with the ability to manage people and empower them to grow and develop under your leadership? Are you great at motivating others to join your movement? Do you excel at building effective business strategies? Do people see you as a source of energy? If so, you could be an exceptional Chief Executive Officer. The CEO is responsible for setting the course for the practice, defining the culture, and making sure the key leaders are in place for the future. In this role, you need to know a little bit about everything.

But what if your real skill lies in executing a plan, managing departmental leaders, and effectively "making sure the train arrives on time?" You could be an ideal Chief Operating Officer. As a COO (often called an "integrator" or an "operator"), you are making sure that things are getting done inside of the business to assure that the vision is fulfilled. Typically, you love process and systems. You know how to manage checklists. You have incredible attention to detail. And you take pride in managing your other leaders. Historically, while CEOs get a lot more publicity and recognition, the COOs are often the real key to the success of a business.

5 Chief Clinical Director/ Dental Associate

Wait, am I saying that you can be an entrepreneur WITHOUT having to

You can own 100% of the company, and hire out the roles of CEO and COO. Part of the reason so many dentist entrepreneurs experience exceptional growth is because THEY are exceptional clinicians and teachers.

There is something incredibly special about being able to develop and lead your team at one location. In fact, some of my favorite years in my career were when my practice had five dentists under one roof. We were really connected, and our culture was healthy and strong. Eventually, our growth strategy resulted in spreading our core dentists out to multiple locations. In hindsight, I missed the

at this are skilled in communication, strategic planning, management, capital acquisition, and at adapting to change. Regardless of whether you acquire new locations or build them from the ground up, my rule is that each new location doesn't result in a merely linear increase of complexity, but rather an EXPONENTIAL increase. That's right: two isn't twice as hard as one ... it's 4 times harder.

be the CEO/COO of your dental company? Yes ... and I actually think many dentist entrepreneurs miss out on this awesome role fit. You can own 100% of the company, and hire out the roles of CEO and COO. Part of the reason so many dentist entrepreneurs experience exceptional growth is because THEY are exceptional clinicians and teachers. The best way to harness those skills could be as a Chief Clinical Director with the responsibility for managing the dentists and developing best practices for the clinical teams. When you succeed in this role, your abilities are magnified across all the providers, almost like a set of dominoes. Great Chief Clinical Directors tend to be one of the most in-demand roles for growing companies.

But what if your only responsibility in the growing business was to show up, see your patients, and go home? Did you know that there are dentists that own large, entrepreneurial businesses where they simply fill the role of dental associate? That's right, they hire out all the other roles in leadership and management and focus on what they enjoy most. They provide great care for the patients, but they do not call all the shots for the whole office relative to growth. This model is extremely common in medical practices, where dermatologists and orthopedic surgeons start great practices but hire out executives to grow the company so they can simply be clinicians again.

6 Advisor/Investor

All this talk about types of dental businesses and specific roles can make anyone tired, just like the journey itself. What if your role in your dental company is simply to collect a check in the mail from your beach house? If so, simply being an advisor or investor could be the fit for you. This means you are sitting somewhere else, whether it's down the street or around the

world, and you are supporting the business indirectly with a seasoned leadership team making all the day-to-day decisions.

It is an option that few of us consider because it is not hands on. We cripple ourselves by saying that we must "be in the practice" and "do all the things" because we have an "If I don't do it, nobody will do it" mentality. This, my dear friends, is categorically false. There are dentists all over the world that are not working in the businesses that they own or created, but are still cashing in on them and watching their creation grow and serve the community. Heck, some of them are not even the founding dentist. It might not be any different than investing in real estate or stocks, other than it being an industry you know extremely well.

This approach is valuable because of the freedom it gives you. When you are acting as an investor or an advisor, you are as involved as you want to be. As long as the practice is making a return on your investment, you can stay out of the operational details of the practice.

7 All of the Above

Remember that original point about how the entrepreneurial dental journey may have many different phases and is likely not linear? Imagine that your career could include all six of the different possibilities we have discussed above. Consider that we choose our professional journey to help fulfill our personal goals, and if your personal life is like mine, it will have many different phases as well. Use the strategies above like a set of tools. I've never met a dentist that only used one instrument to complete all their procedures. Using the approaches we have outlined, you can continually select the right tool to match each phase of your personal journey as a dental entrepreneur. ■

Eric J. Roman, DDS

Eric is a true dental entrepreneur. With his experience as a CEO, executive coach, and founder of multiple dental businesses, Eric is able to deliver uncommon insight from inception through exit. His true passion is helping leaders accelerate life satisfaction, impact, and sustainable team culture, which he delivers through his role in leading curriculum development for the Dentist Entrepreneur Organization (DEO).

A Vision of True Growth

Why scaling group practices need a marketing partner with dental industry expertise to “level up” their lead generation efforts.



Many dental group practices grow so fast, they may not realize that they’ve moved beyond what a traditional marketing agency can provide them. Ted Kozel, Chief Revenue Officer of SMC National, said he can spot some of the underlying issues pretty quickly when hopping on a discovery call with new clients.

For instance, when it comes to providing potential patients helpful information, does a dental group practice’s website pass the Starbucks test? “If you were to Google ‘Starbucks Near Me,’ it’s going to give you the one down the street – it’s not going to send you to starbucks.com,” said Kozel. “It’s not going to send you to one page with hundreds of cities, addresses, and phone numbers listed. Yet that’s often what you will see with dental

group practice offices that have multiple locations. All they have is a paragraph, or even just an address, and a phone number saying there are additional locations. Then they wonder why these other locations aren’t doing well.”

Unfortunately, the majority of these office websites are built for a flagship location, and the amount of dedication given to other locations is one page, or one blurb. It’s usually built incorrectly by the web company

because they don’t know how to deal with multiple offices or understand what the patient wants to see.

Just like their business is growing, scaling dental group practices need a marketing partner that understands multi-location growth. “It’s like if you go to a car dealership and you’re looking for a minivan,” Kozel explains. “If that car dealership doesn’t have any minivans, they’re going to tell you that an SUV is just as good. The reality is, you need a minivan, but they’re going to try to sell you based on what they have, what the inventory is, and what the specialty is, not necessarily what you need. It’s the same with some of these marketing agencies.”

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Dental group practice expertise

SMC National is laser focused on the dental group practice industry. Our process offers proven systems that measure ROI and predictable patient flow in order to streamline your group practice and help clear the noise that is preventing you from seeing true growth. We'll be your guide through the long dark tunnel of your everyday and show you what it looks like on the other side.

Indeed, the things that owners of multi-office locations are interested in, and the things they need to track, are different when they make the leap from working in the business to working on the business.

For instance, most generic marketing agencies that dentists would be familiar with provide reactive data, such as one-month old stats. Yet those data sets tend to focus on things that are hard to attribute to actual growth. An agency report may report something like, "Good news, we went from 2.11 page views per session to 2.13." While that may be a good thing, you can't necessarily translate it to new business.

SMC National provides a multi-faceted level of marketing through lead generation, phone training, website upgrades – all pieces that ultimately end up generating more leads businesses can track. SMC National has expertise in the operations/logistics side of a dental group practice, and knows how it can affect marketing and lead generation. Essentially, SMC National can identify things that may be broken in the new patient process. "So instead of just giving reactive data from analytics,

SMC National provides a multi-faceted level of marketing through lead generation, phone training, website upgrades – all pieces that ultimately end up generating more leads businesses can track.

we're giving a dental group practice real world numbers to help them hit their goal numbers, and hit their goals at a lower cost," said Kozel. "If they want 50 new leads per month, we'll get them 50 new leads."

A large part of what SMC National does to help client's marketing campaigns be successful is professional team coaching. We give them the tools to better understand and effectively communicate with people, which goes beyond just answering phones or presenting treatment, it trickles into their personal lives – and that is growth everyone can benefit from!

SMC National pledges to provide you the clientele that you desire, so that you can live out your vision of true growth.

If something in your business isn't working properly, we will do everything we can to understand the root cause and prevent it slowing you down in the future. We care about your marketing and campaigns because we treat them as if they were our own, and that our futures are linked together. ■



Navigating the digital ecosystem

Google and the digital world have changed the way business is done. There are so many pieces involved to ultimately generating and converting a lead online. For instance, say somebody clicks on your ad and everything looks good. They then hit the back button, Google your name, and read your reviews. Then they call from that number. Was that a Google ad conversion?

"We help to make sure that we're generating the lead, driving it to a site that we created, and helping the dental group practice make sure that they convert," said Kozel. "We're helping generate more reviews, how to respond to reviews, helping with social media ... all part of this greater digital ecosystem that can be hard for businesses to attribute directly where a lead comes from."

Strategic Planning

Building a sustainable DSO begins and ends with trust. : By Jeromy R. Dixon, DMD MBA

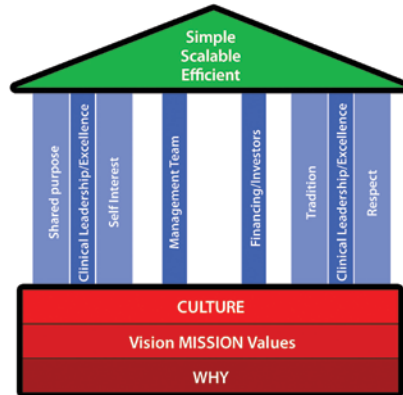
The key to building a sustainable DSO is trust. Pretty cliché, right? While that might seem like the obvious ingredient to building any business, earning trust is critical to accomplishing organizational goals and ensuring that you, as the leader, are granted the ability to lead your team. It's difficult to establish trust in working relationships, and it's even harder to build a sustainable company once you lose it.

Building trust within your DSO

With acquisitions, you are typically affiliating whole practices into your organization, with them adopting your brand identity and your team's culture. This process requires an enormous amount of trust on the side of the affiliating dentist/practice, and it is something all DSOs should take very seriously. It's all about trust, integrity, building rapport, and building working relationships that benefit everyone involved in a simple, aligned structure. Many times when you are affiliating new practices, these doctors are seasoned and are looking for an exit strategy. You must always deliver on your sales pitch and not overpromise/underdeliver, but if you've only been doing this for a few years or you are much younger than them, you must first earn their trust.

The way to accomplish this is to construct your DSO with a compelling and inspirational mission, vision, values and culture. When you have a

THE DSO HOUSE



compelling vision for the future of dentistry, it gives doctors and practices something to join in on that will improve dentistry while also taking care of their teams. The only caveat is that you must deliver on your vision. If you don't deliver on it, the trust they have in you is gone forever. It's tough to get that back (if not impossible), both from the doctor and the team. So, you need to start with a vision that allows for others to trust you and give you a chance. If you do it right, you will be able to use those practices as references and leverage those references into more business.

Another key component of your organization trusting the new affiliate is to conduct proper diligence. This ensures the new acquisition is a great fit for the organization. A well-constructed system of questions about the dentist and the practice will help ensure there are no surprises post-acquisition, eroding trust. Also, another simple diligence hack is to investigate some

primary elements of their procedure mix. The most important things to look at initially are the percentage of revenue from hygiene, and the percentage of revenue from crowns and fixed prosthodontics. Crowns and fixed prosthodontics tend to drive practice revenue and profitability up or down, depending on whether they are in normal ranges. If they are significantly higher or lower than 25-35% of a practice or group's revenue it will require additional diligence. I also look at the percentage of the overall revenue from hygiene, hoping for an opportunity or as a signal for over-treatment. If the percentage of hygiene to overall revenue is under 25-35% it likely indicates an over-treatment planning issue, while a percentage over 25-35% likely indicates under-treatment planning and a significant revenue-increasing opportunity post-acquisition.

Three pillars of a solid DSO house

Building a sustainable, investable DSO while maintaining trust might seem like an insurmountable challenge, but it is possible.

My favorite way to illustrate the key components of a sustainable, investable DSO is using the analogy of a "DSO house". Picture a very simple, basic house or structure that has a solid foundation on the bottom, a robust roof on the top, and three major pillars in between holding up the roof from the foundation.

The foundation of the DSO house symbolizes your mission, vision, values and culture. A good foundation in a house is the building block for all the rest of the house, ensuring that infestation or erosion from elements or pests does not occur. Mission, vision, values and culture, when safeguarded and protected from negative external influences, can be the protection and foundation for your company. For these things to act as the foundation of your business, you need to ensure that they are embedded into every part of your operations and culture. It needs to be compelling and unifying. What binds everyone together? What gets them to work and gives them meaning beyond their paycheck? When you don't have that dialed into the foundation of your organization, it can create a lot of dysfunction within your DSO. Alternatively, when you have your mission, vision, values and culture woven like a beautiful tapestry throughout every element of your organization, you have created the foundational element of excellence and sustainability.

The three major pillars of your DSO house are clinical leadership and excellence, a synergistic management team and the right financing. When these three pillars are in place, coupled with a solid foundation and a strong, protective roof you have the ingredients for DSO success. Let me explain more about these major pillars:

1 Clinical leadership and excellence

Clinical leadership and excellence are crucial to the success of your DSO. This is the number one thing that you need to ensure quality dentists and patient

care, and it's the one that most DSOs lack or don't really understand how to create. You must develop leaders within your organization and give your dentists a clear career path with attainable goals. Every DSO struggles with the same issue: How do I find the best dentists? How do I keep them? How do I improve my clinical quality? Improving dentist and employee retention, as well as increasing opportunities for personal and professional development, are key to overcoming this struggle. Employee engagement starts with your DSO foundation and clarity around a long-term career path with your organization. The leadership must engage with your dentists, listen to them and offer career development opportunities that will enhance clinical performance.

2 Synergistic management team

In addition to clinical leadership, you must have a synergistic management team in place working to support and enhance clinical operations. The synergistic management team includes several roles that are working together towards the same goal, and each position should ideally have different strengths. The CEO is typically the inspirational, visionary leader with a broad skillset, and the COO is likely to be process and systems focused with a keen eye for talent, oriented toward execution and team accountability. A CFO who understands dental operations can be extremely helpful, while a PC President, or a CDO/CCO who connects with and manages your dentists proactively, ensuring they are heard may fill out some of the other key areas of your management team.

When the management team is properly constructed, with complimentary skill sets, financial alignment and one clear goal, the sky is the limit.

3 The right financing

The right financing or investors are instrumental to the success of even the most well-conceived DSOs. First, a best practice is to forge a relationship with traditional banks (regional business banks tend to be the best first option) and work to establish a lending roadmap for organizational growth. Instead of boldly declaring that your organizational goal is "I want to have 50 practices," which may scare them off, explain to them that you are growing a group dental practice and focused on setting all of the correct pieces in place to ensure success. Bankers are risk-averse by nature, but if they understand that you have a solid plan they're more likely to partner with you and support your growth plans. Building a mutual relationship of trust with a financial partner is the best way to ensure that you have the funding needed to achieve your business goals. Once you have gone as far as traditional banking will take you and you want to continue to grow your DSO, private equity or family office investors can be a good option to pursue additional liquidity and growth. The key is to work with a trusted advisor who understands how the investor process works and ensure the fit is right, not just the financial terms of the deal.

The roof of your DSO house symbolizes protection from external elements and disruptions that will erode and destroy your DSO: simple,

scalable, and efficient. These protective words are an important test against every new initiative, business process change, new hire, etc. Every decision that is made within the organization should be congruent and aligned with the “simple, scalable and efficient” mantra. If a decision is not congruent with any one of these things, it should be rejected in favor of only items that are aligned with simplicity, scalability and efficiency.

If you’re running a budget or any other decision through your organizational model, it needs to align with the foundation of your mission, vision and values, and meet the criteria of being simple, scalable and efficient. The foundation and the roof of your DSO house will be the protection you need to ensure trust with your teams and organizational consistency as you scale up.

Retaining a winning team

When I operated my initial DSO as sole owner from 2010 to 2013 (and with PE partners until 2015), the current trend of joint venture options where doctors have the ability to obtain equity at the clinical entity level or the DSO level didn’t really exist. Around 2010, I saw the need to do something beyond just having dentist employees, so I instituted a hybrid approach, where there was a profit-sharing partnership career path for my best dentists as an incentive to allow them to feel like a partner and share in the profitability of their practices.

While my initial approach was effective 10 years ago, the DSO landscape has evolved sufficiently in the

realm of dentist partnerships with DSOs to the point where I believe that every DSO must have a true equity partnership option at the DSO and/or clinical level to ensure retention of the best dentists. Every DSO I’ve been a part of architecting or as a Board Member since my first DSO has included a true equity partnership option for top dentists. Most often I see top DSOs offering flexible joint venture options, both in terms of DSO-level equity and in clinical equity when offered.

Another part of a winning retention strategy ensures that you hire the right people for the job, ensuring a fit with your organizational foundation. As a best practice, I asked potential job candidates about their plans for the next 5 to 10 years, and I found that most people are pretty honest about what they want for the future. If a dentist said that they wanted to work for me for a few years and then open their own practice, I would immediately (but politely) let them know that they aren’t a fit for my organization, but that I would support them and help them find the right job for them. It’s important to remember that when you are looking to build something sustainable, you must have dentists that will align with your vision; in other words, they are committed long term. At this point, a clear career path with a joint venture or partnership option is a must have in your organization if you want to recruit and retain the best dentists.

Getting the right people and dentists in your organization from the beginning, ones that are connected to you and committed long

term, will help you build a better culture, a better team and a sustainable DSO.

When you properly architect your dental group using the basic concepts of the DSO house, you have set yourself on a path to ensure trust with your teams and new affiliates, you will minimize the conditions for over-promising/under-delivering, and you will have set the correct conditions for a sustainable, investable DSO. ■



Jeromy R. Dixon, DMD MBA serves as CEO of The DSO Project where he is responsible for the overall strategy, design and implementation of consulting services, and provides overall guidance for clients. Additionally, Dr. Dixon is CEO of Dental Capital Partners, a healthcare-focused M&A Advisory Firm where he advises private equity investors and DSO’s. He also works as a trusted advisor on PE-backed DSO boards and dental-focused Advisory Boards.

Dr. Dixon is a three-time INC Magazine 500/5000 awarded entrepreneur, Former CEO Member-Board of Directors of The Association of Dental Support Organizations (The ADSO), and Former Member of The ADSO’s Membership Committee. In 2019, Dr Dixon was also named to Group Dentistry Now’s Inaugural ‘DSO Influencers to Watch’ List.

How to Build a Better Executive Team for Your Organization

By Lori Noga, DMD, Founder and CEO of Tranquility Dental Wellness

Editor's Note: Dr. Lori Noga is the founder and CEO of Tranquility Dental Wellness in western Washington state. The concept of “Experience Affordable Luxury” began with a vision to take the fear out of dentistry by removing barriers patients see and feel.

My vision has always been to live to my highest potential and to help other people live to be the best version of themselves. The more we grow our dental group, the opportunity for developing our people to their fullest grows exponentially and compounds our impact on our team, our patients, and the industry.



As I began to build my executive team in recent years, my biggest challenge was not knowing what I didn't know. (Spoiler alert, this seems to remain my biggest challenge, no matter what size we grow to!) I was trying to off load much of the tactical operations I was responsible for daily and move toward a visionary role, but I often found myself trying to figure out 'how,' rather than WHO could help me grow and who could successfully and expeditiously offload various pieces of the business from my plate and make room for me to continue moving toward being a better leader and CEO.

But to better understand the roles I was hiring for, I needed to ask some basic questions:

- › What's the greatest need for the business?
- › What is my biggest weakness and/or the thing that gives me the most anxiety?
- › What is the skillset required for this next hire? (Ideally, it's someone who LOVES those things that I am not good at or bring me anxiety.)
- › Where is this hire going to have the most impact?
- › Will this hire help increase revenue or decrease expenses?

Today, I am seeking hires who already innately possess the skills I need for the role I'm hiring for. I used to hire from emotion and gut-feeling, but that model doesn't work.

You must assess your business and tackle the greatest need. For most dental organizations, that starts with having an operations person in place. I'm fortunate to have one who is very dedicated, but finding that person who is as passionate as I am is only one component. That person must also challenge me as a leader, so I can grow and that has helped change my mindset. Being open to their feedback, being able to sit back and really be OK with not being the smartest person in the room, letting others speak their ideas while just listening intently was a difficult and large leap, but it's a game changer for any leader.

Accountability

In our organization, we don't have 'office managers,' we have Chief Experience Officers (CXOs) who are responsible for the experience received by our customers at the practice level. Part of their role is tactical through scheduling and answering phones, but their main responsibility is to support our customers and protect their experience. Our customers are, in priority order: the doctors, the team and the patients.

The CXOs own and measure the outcomes in their locations through data. They lead team meetings and review metrics. Each person on their team owns two to three key performance indicators (KPIs) and they are responsible for reporting on their KPIs in their location meetings.

In our next evolution, we're working on training them to understand the drivers of each of their KPIs. Understanding if they are on or off track is step one, but really understanding the questions to ask and digging in with their team to move the needle on each

KPI is how they can really drive results and empower their team to win.

Accountability is built in the transparency that is created in these team meetings by having the team members own their own KPIs and report on them collectively. It motivates those that want a clear scoreboard and like to have control over their own success and drives out the people who don't want to be held accountable.

Company culture and alignment

Alignment is so much easier when your company is smaller. It's harder to achieve and maintain as you scale. As we've scaled, I'm in each office less and less and have to delegate much more to the leadership team. I've found the biggest challenge is maintaining that alignment and culture at every level when I'm not in direct contact. Moving from a place where I had control and was involved in most conversations to one where I've delegated and let go took a lot of courage, but it's critical to scale.

I'm at the point in my leadership journey where I'm letting go more and more and encouraging the team to make and own decisions and results. We have a lot of missteps. Sometimes it feels like I could have done something faster or it would have been easier for me to do it myself, but supporting them through their missteps (and their successes!) is how they grow. Valuable lessons are learned by everyone with each attempt. Ironically, it improves alignment because we have to come back together as a team and understand what worked and what didn't and find a new way forward. With each of these conversations, we see that we can no longer grow or be success in our silos alone. As we grow and scale, it becomes clearer that individual successful doesn't drive the team's success. Success happens when we are fully aligned and act as one true team. ■



Dr. Lori Noga is the founder and CEO of Tranquility Dental Wellness Center, a dentist-owned dental group located in western Washington state. Her concept of "Experience Affordable Luxury" began as a single, de novo dental practice with two employees. With her business prowess and a passion for empowering her team, she quickly grew it to a multi-location, multi-million-dollar enterprise in five years, earning a spot on the INC 5000 Fastest Growing Companies list in 2019. Other accolades include being recognized as "An Icon Of Dentistry" by Ultradent in 2020 and on the Group Dentistry Now's "Top 10 DSOs to Watch" list in 2019.

Leading the Way

With Jonathan Walker at the helm, North American Dental Group remains committed to growing through a patient-first mindset.

What was news to the dental industry in September had been in the works for a while for one of the nation's leading dental service organizations. North American Dental Group announced that Jonathan Walker, its CFO, had been named chief executive officer. He succeeds Ken Cooper, an NADG co-founder who led the company since its inception in 2008 and successfully grew NADG from a single clinic to be one of the nation's leading DSOs supporting 250 locations across 15 states.

A professional headshot of Jonathan Walker, a man with short brown hair and glasses, wearing a dark suit, light blue shirt, and a patterned tie. He is smiling slightly and looking towards the camera. The background is a neutral, light gray.

Jonathan Walker, CEO,
North American Dental Group

"I am extremely grateful for this opportunity to lead one of the best-known and best-run DSOs in the country and to be supported by so many terrific doctor partners and team members," Walker said. "Thanks to Ken's leadership, I am stepping into the CEO role at a great time in the organization's trajectory. With its unique culture, dentist partner led operating model, and strong reputation for high quality care, NADG is well positioned for continued success. This is an exciting time for our company, and I'm thrilled to lead NADG into a period of sustained growth."

Cooper, an NADG co-founder, decided in 2019 that, after co-leading the company as CEO since its inception in 2008, he was ready to focus his energy and attention in other areas. Cooper personally led the effort to identify a candidate that he and Dr. Andrew Matta would recommend as his replacement. Cooper anticipated this would be a two- to three-year process, with a goal of transitioning power to the new CEO at some point in late 2021 or early 2022.

Cooper hired Walker in June 2020 as NADG's CFO and groomed Walker to be his replacement. During the summer of 2021, NADG began planning to launch a new, multi-year strategic business plan and determined that the time was appropriate for the transition to begin. The goal was for Walker to be in place to offer fresh perspectives to develop and implement the new multi-year strategic path.

In the following interview with *Dental Group Practice Magazine*, NADG

leadership discussed how the organization plans to move forward.

Dental Group Practice Magazine: (Question for Jonathan Walker) Previously NADG had a shared leadership model with its co-founders Ken Cooper as CEO and Dr. Andrew Matta as CMO. Can you talk about how the structure has changed? What will look different? What will remain the same?

Jonathan Walker: That is correct, for the past dozen years Ken and Andrew ably co-led NADG and grew it to become one of the most influential DSOs in the country. Going forward, Andrew remains responsible for all clinical decision-making and I am responsible for all final business-related decisions.

Ken remains affiliated with NADG as an advisor to me with a focus on new development opportunities. This is an important role for us as Ken has enormous institutional and industry knowledge that will support our continued growth.

Ken and Andrew have established a DSO model with strong, seamless collaboration between the clinical and business side operations, which will continue to thrive under my leadership as CEO.

Dental Group Practice: (Question for Walker)

What are some individual goals you have as CEO?

Walker: This is a tremendously exciting time for NADG. We are in a great position to build on foundational improvements we've made within the business during the



pandemic, pursue scalable growth opportunities, and provide additional supports for our doctors and offices. And we have a plan to get there. We've just launched our initial "Core 3" initiatives which will carry us in to 2022.

The first initiative focuses on taking greater care of our valued team members and giving them more resources they need to be successful in their important jobs. We're committed to engaging our team members, re-evaluating tools they need to more efficiently perform their roles and making sure they are well compensated and appreciated in doing so.

The third initiative is generally reviewing our expenses and identifying opportunities where we can be most efficient. This will allow us to reallocate funds to areas that are of greater priority for our supported doctors and offices – such as, making new investments in technology that helps us provide more efficient patient care.

Dental Group Practice:

(Question for Dr. Matta) Can you describe your role as CMO?

Dr. Matta: First and foremost, we are a healthcare organization that is committed to providing the best-in-class oral care for every patient

can emerge from a solo practitioner mindset to working in collaboration with talented dentists from across the country and earn opportunities to become equity holders within the organization.

The PDA integrates best clinical practices, sets comprehensive standards of care for patients, and sources high-quality supplies for the providers to deliver efficient oral service. The PDA also provides ongoing doctor training and mentorship.

Dental Group Practice:

(Question for Ken Cooper)

How will you continue to be a part of the organization?

Cooper: As NADG's co-founder, I am still heavily invested in the continued success of this company. I will serve as an advisor to the CEO, available to Jonathan to tap into the institutional knowledge and connections I developed in the DSO community over the past dozen years.

I am fully aligned with Jonathan's patient-first goal of growing our business to be the leading support organization for doctors and dental offices across the country. My primary focus as an advisor will be to help identify and cultivate those relationships that could lead to genuine partnerships between NADG and providers. Our doctors do a tremendous job of caring for our patients and have the capacity to do more.

Separately, and personally, I now have the opportunity to focus on other philanthropic and charitable interests that in many ways will support dentistry. I'm also looking forward to spending more time with my family.

"My primary focus as an advisor will be to help identify and cultivate those relationships that could lead to genuine partnerships between NADG and providers. Our doctors do a tremendous job of caring for our patients and have the capacity to do more."

– Ken Cooper, North American Dental Group, co-founder

The second initiative is assuring that our services are available and accessible when our patients need them most. Anyone who comes to one of our supported practices in need of care will be able to be seen by one of our providers, in many cases, on the same day. We're scheduling appointments for patients to be seen within days, not weeks or months. We've adjusted our office hours in many locations to be more accommodating for our patients.

at every visit. That means we must remain keenly aware of clinical developments and opportunities in dentistry that will help us to deliver on our promise of exceptional patient care. As CMO, it is my responsibility to see that we live up to our promise.

We largely get this done through our Professional Dental Alliance (PDA), our doctor-led group that has partnered with NADG to provide non-clinical support to our dental offices. The PDA is where our doctors

Dental Group Practice:

(Question for Walker) Can you talk about the preparation that was involved in you stepping into the role of CEO? How did your time as CFO help?

Walker: I feel certain my prior experience serving as CEO at MedExpress, which operates walk-in urgent care health centers across the country, will serve me well in my role as CEO at NADG. At MedExpress I led efforts to more than double the size of the business over four years and helped establish the company as the nation's premier urgent care operator with more than 300 walk-in centers and worksite clinics across 26 states. In many ways, our overarching goals for NADG are very

“We’re scheduling appointments for patients to be seen within days, not weeks or months.”

– Jonathan Walker, CEO, North American Dental Group

similar, considering that we intend to grow the number of doctors and dental offices we support across the nation to make oral care accessible to more patients.

Joining NADG first as CFO was invaluable regarding my role now as CEO. As CFO, I had the opportunity to work closely with Ken and Andrew, understand how NADG's partner-centric approach to dentistry differentiates it within the industry, and learn the company

from the inside out by closely examining all aspects of our operations and finances. As CFO I revamped our internal revenue cycle and other finance processes and worked with other members of the leadership team to fund resources and bolster operations at the practice level.

Those steps as CFO are important as we embark on our “Core 3” initiatives and ultimately grow our business and establish NADG as the premier DSO in the country. ■

The State of the Dental Industry

With a culture-centric approach, North American Dental Group is focused on supporting good people and empowering those dentists with the support they need to provide the best-in-class dental care to every patient. When Ken Cooper and Dr. Andrew Matta, partnered to form NADG in 2009, Dr. Matta said: “I wanted to create a hospitalized approach to dentistry.”

Indeed, the team at North American Dental Group is working to transform oral healthcare. Company culture is a huge lever for this transformation, and NADG takes great pains to ensure that all the dentists that partner with them meet the criteria they have established and align with their values. He explained, “There’s a void of lab and dental supply formula alignment around the clinical side because the clinical partners don’t feel like partners. They feel like it’s being forced on them. There’s a lack of doctor-led committees and input, there’s a light focus on culture. It’s

typically a buzzword. It’s the soft side of the business, but it’s not the core of the business.”

Cooper said North American Dental Group is positioned to become the Cleveland Clinic of dentistry. “We have a pure focus on clinical excellence and reputation,” Cooper said. “We’ve let that drive our decisions. We are a group dentistry and not corporate dentistry. We’re culture-centric, bottom up. It’s a servant leadership philosophy with a focus on gratitude. We do no buyouts. We’re a partnership model!”

NADG is working to pay it forward to others in the industry. “I really believe that this industry needs more collaboration, and we are all at risk, whether we know it or not, through regulatory controls and through some of the bad actors from the first-generation DSOs,” Cooper said. “The better we get together, the stronger we get as an industry. The more that we are focused on clinical excellence instead of valuations, the better we will all be.”

Solmetex Maintenance Program

At Solmetex, we understand that dental practices are busy. Dental professionals are interested in the daily care of their patients, while keeping up with the daily trends and technologies. If you are operating a dental office and taking care of patients, complying with the EPA “Dental Rule” may not be at the top of your to-do list. We designed our Solmetex Maintenance Program as a turnkey solution to alleviate guesswork associated with the regulation to ensure your practice is always in compliance. With no fees, contracts, or hidden costs, the Solmetex Maintenance Program will ensure your practice follows the EPA’s standard, helping you avoid any unnecessary fines or office shutdowns.

How the Solmetex Maintenance Program can help you

With the Solmetex Maintenance Program, we are simplifying your waste management processes. Our solution is designed to meet your amalgam waste management needs, while maintaining your EPA compliance. When you enroll with our program, we help you to:

Alleviate guesswork

The EPA “Dental Rule”, effective July 14, 2017, is a document detailing what practices must implement to be in compliance. Solmetex has simplified the process by creating a simple, affordable program that covers all aspects of the “Final Rule.”

Improve peace of mind

Schedule your practice for auto-shipment of the three products required by the regulation and know your office is always in compliance.

Be green

Solmetex products are eco-friendly, and packaging is 100% recyclable.

The PowerScrub Vacuum Line Cleaner contains Mereduce™, an agent that converts harmful methyl mercury to organic mercury which is significantly better for the environment. In addition, PowerScrub contains no harsh chemicals, and is safe for the clinician, the patient and the environment.



The components of the Solmetex Maintenance Program

There are four components to the “Dental Rule,” and the Solmetex Maintenance Program works to address each aspect. Dental practices can set their custom delivery schedule for each of the required products:

1. NXT Hg5 Collection Container –

The NXT Hg5 Amalgam Separator’s Collection Container must be replaced annually or when

solids have reached the full line. Dental practices can determine the frequency with which they need their next container and set their schedule. Solmetex ensures your container is delivered by the date of your choice.

2. Practice Waste Solutions

Amalgam Bucket – The PWS Amalgam Bucket is required for all items that touch amalgam, including chairside traps, teeth with amalgam, spent amalgam capsules, and vacuum fillers. The amalgam bucket must be recycled when full or annually, whichever occurs first.

3. PowerScrub Vacuum Line

Cleaner – The regulation requires the use of a non-foaming, neutral pH vacuum line cleaner for use with the required ISO 11143 certified amalgam separator. PowerScrub’s microbial formulation maximizes the capacity of the NXT Hg5 Collection Container by condensing the solids within the container. Nightly cleaning of vacuum lines is recommended.

4. Compliance Center – Our

Compliance Center is available to you online 24/7. Your Certificates of Recycling are always available as proof of compliance. Whenever a collection container or amalgam bucket is recycled, the portal is automatically updated with the necessary documentation to prove compliance. Cost of recycling and documentation is included in the cost of the product. ■



SOLMETEX MAINTENANCE PROGRAM™

THE FOUR MAIN COMPONENTS OF THE EPA 'DENTAL RULE' REGULATION

1 ISO CERTIFIED AMALGAM SEPARATOR



NXT Hg5 Collection Container

Replace when solids reach
full line or every 12 months,
whichever comes first

2 VACUUM LINE CLEANER WITH NEUTRAL pH



PowerScrub™ Vacuum Line Cleaner

Maximize the life of your
collection container
and vacuum

3 PROPERLY LABELED AMALGAM BUCKET



PWS Amalgam Bucket

For EPA approved recycling
of dry amalgam waste

4 PROOF OF RECYCLING



Certificates of Recycling

Access to Compliance
Center 24/7/365

THE SOLMETEX COMPLIANCE CENTER HAS IT ALL

- View your complete recycling history
- Obtain your EPA-required Certificates of Recycling, available 24/7/365
- Access Proof of Installation certificates
- Print shipping labels for product recycling
- Custom national and regional views for DSOs
- Enroll, set or modify your Solmetex Maintenance Program schedule

THE SOLMETEX MAINTENANCE PROGRAM

Auto-delivery of the products your practice needs to always remain in compliance with the EPA 'Dental Rule' Regulation.

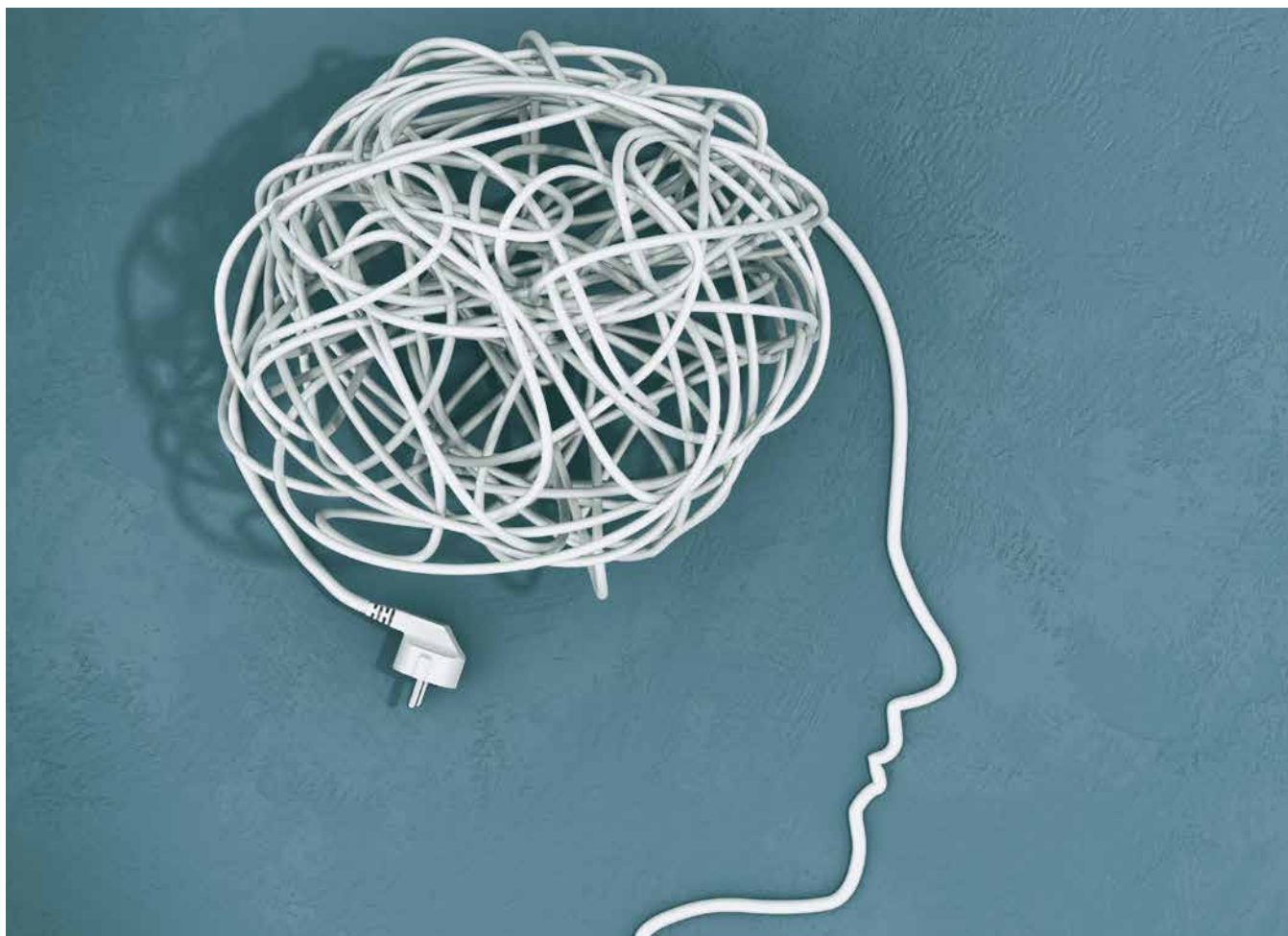
Easy Enrollment — Simply go to www.solmetex.com and click on "Compliance Center".

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Making the Request

How shifting your mindset can transform your business : By Holly Anne Mitchell, founder and CEO of the LeadWell Network

In your journey to success as a DSO leader, it can be easy to find yourself feeling stuck, stressed, or isolated. These challenges can make it hard to believe success is even still possible.

But before we can create a new reality on the outside, we have to create new ways of thinking on the inside. Success is a transformation story, and the journey begins inside your head.

In my entrepreneurial journey, the challenges I faced early on provided me the tools I needed to be successful today; even so, my definition of success continues to evolve as my thinking evolves. I had a lot of adversity on my journey at a young age that forced me to start over many times. In these moments of reinvention, I paused to create space to really go inside and understand who I am and remind me what

I'm here for. This is a process I call "internal renovation."

For entrepreneurs and practice owners, that internal renovation is not just for you personally; it's for the good of your business, because the business is always a reflection of the business owner. Whatever chaos exists within the owner will exist within the practice. The patterns that show up in your team are a reflection of how you show up as a

leader. Do you bring out the best in people or the stress in people?

This renovation means taking a step back and taking stock of the bigger picture. Connect with your why, examine the possibilities, and imagine solutions. And imagining solutions requires courage, vulnerability, and creativity.

Unfortunately, the biggest thing that gets in the way of creativity is something that dentists and entrepreneurs are constantly under – stress. And that isn't just a metaphor; stress literally affects your brain in ways that make it harder to engage in creative thinking. A simple and effective way to remove the obstacle of stress and practice creativity is to develop the discipline of allowing your mind to wander. Journaling or walking device-free can reduce your stress and expand your mind, optimizing your effectiveness when it's time to grind. Look at your calendar and block it into three sections: grind time (productivity), mind time (creativity/thinking), and kind time (connecting to yourself and others).

Thinking beyond what you can see

There are two types of thinking: Divergent thinking and convergent thinking. Our brains are not designed to do both at the same time. Divergent thinking is examining all the possibilities that exist. This is that creative space of, "What do I want? What might be possible? What do I see for myself?" Convergent thinking is, "What is the action that I can take that will be the next closest step for me to get there?"

During your dedicated mind time, it's important to separate divergent thinking (dreaming of what and where from the space of why) from convergent thinking (logistics of the who, what, and when). If you're brainstorming with others, allow space in the meeting for both parts of the brain, separated by a break.

Imagine trying to edit a book as you were writing it, evaluating every sentence as soon as you wrote it. The result would be incredibly time consuming, frustrating, and if the book actually managed to get finished, you probably wouldn't feel motivated to write another one. Trying to create and critique at the same time essentially short circuits our brains, and limits our capacity for thinking.

Divergent thinking is examining all the possibilities that exist. This is that creative space of, "What do I want? What might be possible? What do I see for myself?" Convergent thinking is, "What is the action that I can take that will be the next closest step for me to get there?"

When we look at what resources we have available, we often only see what's right in front of us, and not what resources are available outside. The urge is to then go and get those resources – but that just leads back to the never-ending treadmill of more-for-more's-sake. The treadmill leaves many entrepreneurs feeling exhausted, demoralized and burned out.

The transformational point in my journey came when I shifted

my mindset from the treadmill mentality of rugged independent efforting to, instead, "making the request." I started to learn to make requests early on in my career. And the more I made requests – what seemed to me to be outrageous requests – the more I was able to get to the next level by leveraging the resources and wisdom that exist within my network.

When we take a moment to ask, we create opportunities for giving around us, because people want to give. They want to contribute. The opportunities and the possibilities that exist around them may be one request away. If someone you know has a car, why would you try to ride your bicycle in the rain?

Making the most of those opportunities means accessing your network, and your network's network. Synergize and share with like-minded individuals, and see your progress accelerate and your results multiply. This feeling of connection and contribution will also pay dividends in your mental health.

Why you need a network

The classic entrepreneurial mindset has a strong emphasis on rugged

Remember, each of us is a coach to somebody. A coach is able to illuminate the resources and the possibilities that were already there that may have been overlooked.

individualism and says you should only count things as successes or achievements if they were things that you went out and did yourself.

Getting out of that mindset requires a mental paradigm shift. If you can quiet your mind, identify what kind of support and solutions you need, and access your network, there are so many resources that exist within you and beyond you. Your network's network is full of brilliant, talented friends you haven't met yet.

The pandemic was especially isolating. It highlighted just how important it is to prioritize human connection.

It's hard to know from outside appearances who is truly thriving on their entrepreneurial path. But in the conversations I've had with my dental clients and friends, those who were in the habit of making requests, and who built empowered teams they could rely on, these friends were able to think of new ways to operate and adapt to a changed world.

On the other hand, those who only tried to keep their head down and power through it alone really struggled. I know, because I was one of them. For the first few months of the pandemic, I was one of those "power through" people. Until it broke me. Alone, in my apartment in New York with nothing to do but work, my mental health deteriorated rapidly. And I knew it wasn't only me who felt that way.

That's when I reached out to my friends and asked: "What can we do to help others who are hurting?" We hosted an online event called "Renewal" that combined poetry,

storytelling, and neuroscience to help people regulate their nervous systems and share their struggles. This was the seed from which the Dental Avengers for Mental Wellness was born. In December, my friends and I are hosting the first mental health conference in the history of the dental industry. A project created from a network of like-minded individuals who have rallied around a mission to prevent suicidality in and around the dental industry, by providing educational resources for dental professionals and their families.

Remember, each of us is a coach to somebody. A coach is able to illuminate the resources and the possibilities that were already there that may have been overlooked.

While "making the request" is important, it's just as important to remember to reach out to those on your team, and those in your network, when their baseline behavior has changed. Especially when they retreat from engaging with their networks. Whenever I feel anxious or depressed, I go dark. That's a cue for a trusted friend or advisor to bring me a flashlight. We sometimes have our heads down so far, or have been isolated for so long, that we forgot we aren't alone on the journey.

That's what I love about being a coach. It's not about giving people advice, or telling them what to do. It's just illuminating all the resources that already exist inside of each individual so they can keep creating what's on their heart. It's reminding them of the incredible dreamer they are, and the irreplaceable impact they make on the people around them. ■



Holly Anne Mitchell is founder and CEO of the LeadWell Network and founder of the Dental Avengers for Mental Wellness. The LeadWell Network was created to serve the Dental Industry with a new way to live, work, and thrive: from a state of extraordinary joy. The Dental Avengers Mental Wellness Summit will take place virtually on December 3-5, 2021. For more information, visit leadwellnetwork.com and dentalavengers.com.

The Future Is Now

How Pearl is using Artificial Intelligence to transform dentistry



The future is here. Like something out of a science fiction novel, artificial intelligence has become an incredible tool for so many different industries, optimizing their processes and improving business outcomes. Through advances in artificial intelligence, Pearl has created a comprehensive tool for dental practices and DSOs to streamline the quality and consistency of their patient care, while highlighting areas of growth and profitability they might not have seen before. Led by Ophir Tanz, CEO, and Dr. Kyle Stanley, Chief Clinical Officer, Pearl

is bringing an incredible innovation to the world of dentistry.

Computer vision, a branch of artificial intelligence, is when the machine is taught to recognize and interpret objects in the real world in a way that simulates what the human brain does. In an attempt to describe how computer vision works, Tanz described the process of writing a program for a computer to identify an apple. You would give it characteristics like the curvature, the color, the shape, and the stem. “The problem with that is if you take a picture of a monkey holding an apple, an

apple rolling on the ground, or even an apple sliced into pieces, then that program is going to fail,” he said. “It’s never going to identify all those apples, and you can’t realistically describe every scenario where an apple might exist in the real world so that a computer can identify it.”

Artificial intelligence takes millions of examples of apples in different scenarios: upside down, cut up, rotting, hanging on trees, being half eaten, etc. With that information, artificial intelligence would begin to understand the concept of the apple the way that the human brain does,

interpreting apples by virtue of various characteristics. “That’s what computer vision, and why it’s exciting because it can understand these models of the world,” Tanz said. “Obviously, when we’re applying it to health care dentistry, we’re teaching it how to identify caries, radiolucency, calculus, or whatever the case may be. It can come into direct contact with material it’s never seen before, but very accurately and consistently identify it for what it is.”

Transforming dentistry, one patient at a time

Pearl has developed a couple of different systems for dental practices: Second Opinion and Practice Intelligence. Second Opinion is a software-based medical device, the first comprehensive AI-powered real-time pathology detection aid for dentists. Tanz said, “This software helps practitioners perform a more comprehensive diagnosis and makes sure they are not missing anything. It’s also a very powerful patient communication tool.”

Essentially, Second Opinion works as a second set of eyes to help ensure the dentist that he or she has considered every condition that appears in the patient’s radiograph. Using dental radiographs, the software can detect signs of most dental pathologies and any other treatable conditions that would appear on a radiograph. Most importantly, Second Opinion will be able to deliver the same high-quality analysis every single time.

“What you have in dentistry is this massive consistency and accuracy issue,” Tanz explained. “More than anything else, what AI is going

to do is help to level up the standard of care across dentistry. The machine doesn’t get tired; it doesn’t have a bad day.”

By integrating Second Opinion with practice management software, Pearl can look at entire patient populations to develop treatment funnels. Dentists can navigate through these funnels and see the patients in each group, looking at their radiographic evidence to get a better idea of what the patient needs. Tanz explained that with the Second Opinion technology, dentists can correctly diagnose and treat more dental maladies than before. “We typically will surface a minimum of a million dollars in historically undiagnosed and untreated opportunities for practices that we engage with on day one.”

“More than anything else, what AI is going to do is help to level up the standard of care across dentistry. The machine doesn’t get tired; it doesn’t have a bad day.”

– Ophir Tanz, CEO, Pearl

Training dentists and office managers

With Practice Intelligence, Pearl has created a solution that can leverage practice data into improved practitioner performance and patient health. Because it’s designed to optimize the entire practice, office managers and clinicians have separate types of training to onboard with the system. Office managers can use the call sheet functionality

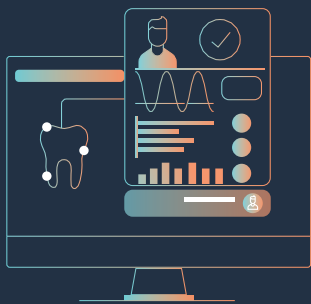
to show them who to call into the office, allowing them to implement better scheduling processes to drive revenue. The clinicians can use the system to identify what needs to be treated and better plan for patient visits. Additionally, Practice Intelligence can be used to show office and practitioner performance over time.

By merging radiographic insights from the AI-powered pathology detection engine with patient data from the practice management software, Pearl can deliver clinical insights to elevate the oral health of your patients and financial health of your practice.

Tanz said, “Each of our practices get a dedicated account manager, and we will start with a workbook approach. We look back a few weeks to see what the practice has done and compare

that to what the practice could have done with Pearl. We identify what would have surfaced and what the next few weeks could look like.”

With these innovations in artificial intelligence, Pearl has created a unique opportunity for dental practices to improve their processes and elevate their ROI. Tanz said, “We are performing a comprehensive, historical and real time chart audit with the AI.” ■



Practice Intelligence®

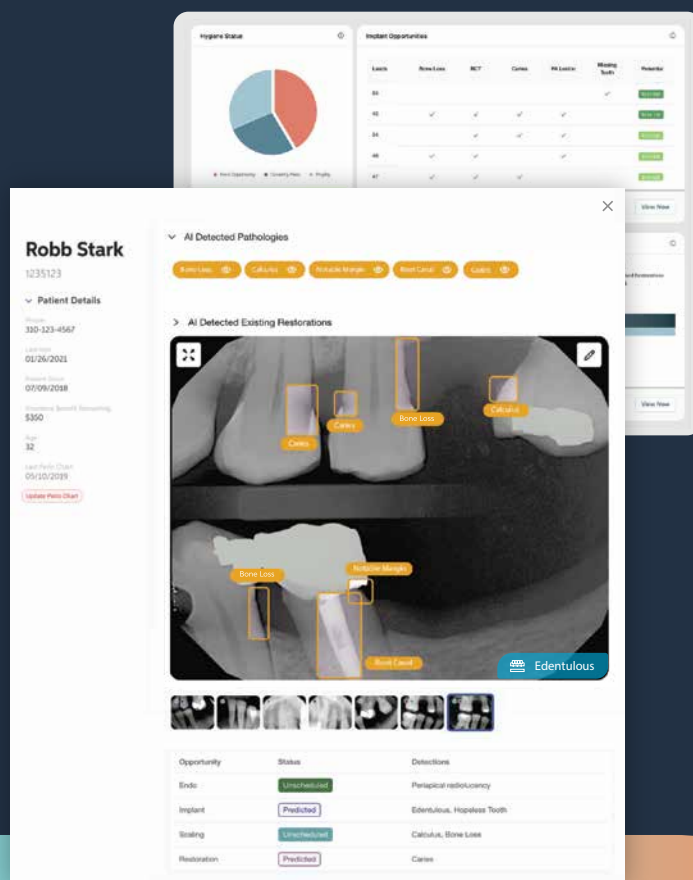
pearl

Spin practice data into profit, practitioner performance and patient health with computer vision-enabled clinical performance insights from the world's most advanced AI-powered pathology detection engine.

Pearl's AI

Trained on the largest collection of expertly annotated dental imagery in the world, Pearl's computer vision system reads radiographs with the accuracy of an expert dentist and the speed and consistency of a machine.

Practice Intelligence® puts Pearl's AI to work for dental offices, identifying fresh clinical opportunities through automated synthesis of AI radiologic detections and patient data in the PMS.



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- Treatment success



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hellopearl.com/practiceintelligence

Compare Apples to Apples When Evaluating Location Performance

Why Dental Group Practices Looking to Grow Need a Centralized Practice Management System

Karina Santos, Strategic Customer Success Manager for Henry Schein One, worked with dental leaders long before the term dental service organization (DSO) was even used to describe these organizations. As the dental group practice market has experienced explosive growth in recent years, Santos says standardizing processes and workflows across locations is more critical than ever to a group practice's success.

Not doing so creates inefficiencies, headaches, and in some cases costly errors or missed opportunities. "If a practice location is doing something differently than another location, and they define their items in a software differently, then their data is going to be different," she says.

The key is to have a centralized practice management system, such as Henry Schein One's Dentrrix Ascend. The following three ways demonstrate how a centralized practice management system can play an important role in standardizing processes:

1. A centralized database minimizes duplicated records and effort. With a centralized system and database, team members share the same terminology, resulting in more data accuracy. That means the process to enter patient data from their first visit on is much smoother and more efficient.



2. Team members can go between offices and only have to know one software instead of multiple. Team members are in sync with the practice management system across locations because the software is the same. By training on one system, dental group practices free up time, resources

and money for other areas of the business.

3. You can be assured that when you're looking at data, it's the same type of information no matter which location. Think of it as opening up a Starbucks store, Santos said. "You have to document the systems that you have in your flagship. Then in order to replicate, you have to define the standards. That's what you train and teach, to duplicate right to scale."

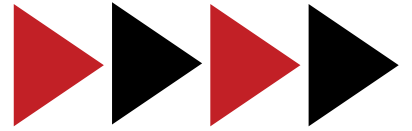
Indeed, it's incredibly helpful for dental group practices that want to grow to have a software that allows a one-time setup so they don't have start all over again each time they open up a new location. "Identifying your standards, documenting them and then replicating them will not only help ensure data accuracy, but also allow for scalability and growth," Santos said. ■

Learn More

Dentrrix Ascend offers a smarter, more natural interface that's easy to learn and master. With one-click access to patient information and customized workflows, your team can get more done in less time.

For more information, visit www.DentrrixAscend.com.

[QUICK GUIDE] HOW TO BUILD OUT YOUR LEADERSHIP TEAM



CURATED BY THE MOST INFLUENTIAL DENTIST-ENTREPRENEURS
IN THE GROUP DENTISTRY SPACE



INTRODUCTION

By the DEO

To scale your dental group successfully, The DEO believes it's key to surround yourself with entrepreneurial-thinking, growth-minded people. The DEO connects dentist-entrepreneurs and DSO leaders to work through challenges together. They emerge confident leaders with vision and purpose to grow their dental groups.

Having worked with hundreds of dentist-entrepreneurs, The DEO has found tremendous value in solving problems together with those who have “been there, done that” — those who are trying to get to where you are, and those who are where you want to go. The DEO subscribes to the philosophy of “Why reinvent the wheel?” With opportunities to learn new approaches for handling roadblocks as well as strategies to plan for success, dentist-entrepreneurs gain clarity and shatter the mental blocks holding them back.

To date, DEO members have 900+ practices combined with an aggregated combined revenue of \$1.3 billion. The DEO offers membership (benefits include mastermind sessions, coaching, private member events, peer learning, a resource library, and more on associates, leadership, operations, and systems, recruiting, retention, financial structure, and all the issues dental group leaders face) plus twice-yearly Summits open to the public.



The DEO has curated this resource to help dentist-entrepreneurs/leaders of emerging dental groups survey the current and future trends. Understanding the impact of these trends will help you decide what is necessary for the next step toward achieving your scaling vision.

THE DENTAL ORGANIZATION GROWTH MODEL™

No matter where you are on your dental group's growth journey — looking to add your first location, grow from 1-3, 3-5, or 5-10 locations, or beyond — you are inevitably going to run into some tough issues, everything from hitting your own “leadership ceiling,” to hiring and training your team, systems and infrastructure, revenue cycle management, to creating leaders, and more.

The DEO understands these issues from helping hundreds of dentist-entrepreneurs grow their dental groups and has developed a framework — The Dental

Organization Growth Model™ — to help leaders get out of the “dark tunnel” and solve the issues that are lurking there. This framework can help you determine where you need to spend your time, where your biggest issues are, and where you need to level up.

To scale successfully, as the model notes, you can't be in chaos. Team momentum is achieved by talent management: attracting/retaining an A+ team (this guide's focus); systems alignment: tools to achieve the vision; and leadership development.



BUILDING YOUR LEADERSHIP TEAM



One of the difficult parts of being an entrepreneur and leader is when we second guess ourselves. It can be a lot of pressure sometimes when the buck stops with you, right? One remedy we've found that actually alleviates much of that feeling is surrounding ourselves with the right team ... specifically the right leadership team.

Building a leadership team that is smarter than you about certain facets of business can give you confidence that you aren't making decisions in a vacuum. Instead, you are relying on a talented and SMART team of leaders to determine your vision and make hard decisions.

Thus, we are glad to share with you this resource: [Quick Guide] How To Build Out Your Leadership Team. To download it, simply scan the QR code to your right, to gain instant access or visit www.deodentalgroup.com/how-to-build-your-leadership-team.

Part of being a good leader is recognizing when you need help, and that you can't do it all by yourself. The days of bootstrapping and wearing many hats are coming to an end. This guide will give you a concrete sense of direction. You'll lose the trepidation of figuring out what to do first.

Likely, the first question you'll face is who to hire and when? You may also be asking: Should I bring on a CFO or CMO first? Do I really need a Chief Compliance



Officer? How much should I pay my COO? What role do consultants play? This guide will show you how to approach these questions and more. You'll be tapping proven methods already used by hundreds of dentist-entrepreneurs / DSO leaders.

A common mistake that business owners make is hiring someone before they are really ready. This can be problematic for several reasons. Hiring too soon can leave you with the following challenges:

- › **An unclear job description** — too much or too little for one person to take on.
- › **Trying to find a unicorn** — one person to wear several hats, setting up unrealistic expectations.
- › **Hiring someone with a lot of experience** who is used to having a full team to support them.
- › **Hiring someone who is very green** can cause more work for you training them and providing constant direction.
- › **Spending money unnecessarily** — hiring a full-time employee costs more than just their salary. You're also paying for recruiting and benefits.
- › **Hiring the wrong position** that doesn't solve your problems.

The 4 Options For Support As You Grow

- 1. Peer to Peer:** Your peer community at the DEO — learn from those who have walked in your shoes. Get advice from those who have been there or are going through it right now.
- 2. Consultant:** Consultants are great when you need advice and direction. They will help to provide clarity in what you need to do or confidence that you are on the right path.
- 3. Fractional:** The fractional option is great when you need help with the execution piece, but not full-time. This is a natural stepping stone between utilizing a consultant and making the full-time leap.

- 4. Full-Time:** You know it's time to bring on a full-time team member when you've gone through all of the above options. At this point, the key limitation to creating more impact is solely time.

To scale successfully and sustainably, it's time to take off some of the many hats you've been wearing. You can't do it all by yourself anymore. Use this guide to determine whom to hire, what considerations to make as you grow your business, and plan your next actions to take to start building your team. The DEO hopes this guide helps you build the leadership team you need to get your dental organization to the next level.



BISCO introduces TheraBase to growing TheraFamily line of calcium releasing materials

BISCO's TheraFamily line of calcium releasing materials grew this year with the launch of TheraBase. The quality materials used in the TheraFamily allow dentists to provide their patients with the best experience and outcome possible, leading to happier and more loyal patients.

As direct restorations are the bread and butter of the general practice, it's important to know that you have reliable products on hand. Just like all of BISCO's TheraFamily products, TheraBase is made with materials that are strong and stable and feature easy deliverability.

Packaged in an auto-mix dual-syringe, TheraBase is a dual-cured, calcium and fluoride-releasing, self-adhesive base/liner. As a dual-cured material, TheraBase will polymerize even in deep restorations where light cannot reach.

Through the company's proprietary THERA technology, TheraBase chemically bonds to tooth structure and releases and recharges calcium and fluoride ions which generate an alkaline pH to promote pulp vitality.

Compared to glass ionomers and resin-modified glass ionomers, TheraBase has a high compressive strength, allowing it to withstand bite and occlusal forces, and to provide a stronger foundation for direct composite restorations. It also contains MDP, ensuring an optimal bond to dentin.

These materials lead the resin-modified calcium silicate (RMCS)

market, offering the physical and mechanical properties required to provide exceptional clinical care. Additionally, as a self-adhesive material, TheraBase is ideal for using the sandwich technique without needing to bond it to the cavity prep surface.



Meet the TheraFamily

The newest addition to the family of products continues the line's legacy of ensuring high-quality, aesthetic restorations. The growing TheraFamily line boasts a unique array of benefits for both dentists and patients:

TheraCem – A self-etching, dual-cured, self-adhesive resin cement formulated for luting crowns, bridges, inlays and onlays, as well as prefabricated metal and nonmetal fiber posts and cast posts. This fluoride- and calcium-releasing cement eliminates the need to etch, prime, or bond prepared surfaces. It can be placed quickly, producing a strong bond for indirect restorations. Its high degree of conversion offers increased strength, while its high radiopacity allows for easy identi-

fication and differentiation from recurrent decay and other restorative materials on radiographs. Patients also benefit from continuous calcium and fluoride release.

TheraCal LC – A light-cured RMCS flowable pulpal protectant material for direct and indirect pulp capping. TheraCal LC can also be used as a protective liner under various materials, including composites, amalgam, and cements. TheraCal LC's alkaline pH promotes healing and its calcium release stimulates hydroxyapatite and secondary dentin bridge formation. And, since it's virtually insoluble, it won't wash out over time.

TheraCal PT – A biocompatible, dual-cured, RMCS for pulp potomies, placed after the coronal pulp is partially or fully removed. TheraCal PT also indicated for direct pulp capping and as a liner for direct and indirect pulp capping. The strong, radiopaque material resists breakdown and degradation to provide a durable seal. Importantly, TheraCal PT is dispensed from a syringe and doesn't require hand mixing. This time-saving method is critical for working with pediatric patients. ■



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Onboarding Locations

DecisionOne leaders discuss lessons learned during their organization's growth.

DecisionOne Dental Partners is a clinician-led firm that is designed to drive all decisions towards the best outcomes and processes for the patient. DecisionOne works with dentists at all stages of their practices, whether they are just getting started or looking to retire. By changing the way dentistry is done, the DecisionOne team is looking to improve the lives their patients and team members.

In the following panel, DecisionOne leaders discuss their organization's growth with the DEO. Participating in the discussion were:

- **Cheryl Rytina** is the Director of Operations at DecisionOne Dental Partners. Rytina works with the due diligence in the acquisitions process, ensuring that the transition between the acquisition manager and the ops team is seamless.
- **Michael Lovergine** is the transitions manager for DecisionOne. He helps to assimilate new practices into the group, acting as the communications liaison between the practice and DecisionOne.
- **Kristy Walter** is the insurance/AR manager for DecisionOne. Walter works out of the support center at DecisionOne, centralizing their insurance, AR, and verifications processes.
- **Mike Olson** is the Senior Director of Mergers and Acquisitions at DecisionOne. Olson works with general dentists who are looking to transition their office, either to begin a retirement plan or to grow and strengthen their existing practice.



The DEO: Let's get started with how your team is structured as a whole. Were you before? How has the team evolved?

Cheryl Rytina: In the very beginning, it was one and the same. Dr. A.J. Acierno was CEO and a practicing dentist, and he was going out and finding practices. Mike Olson, we were very lucky to have a relationship with him early on when he was working for a bank. That

relationship goes a long way back, and we are lucky to have him on the team at DecisionOne. At first, he was helping us to identify good practices to buy and seeing the lending support behind that.

All three of us would deploy to an office and do what we did best – forming relationships with the teams, finding out what they were looking for, and what success meant to their office. We would help implement systems to bring them to the next level and then we started building our own infrastructure as we continued to grow. At some point I did marketing, someone else did the recruiting and payroll and those kinds of things. So, it really was “Here, whoever’s available, do it,” at one point. It grew quite quickly from one office to another to another.

The DEO: Can you walk us through the order that you split the team into different positions and how you made those decisions?

Rytina: I think the order went in what the teams needed to be supported. It started with accounting, which we always looked at it as a result of what the offices are doing. After that, we realized that marketing was a really big part of getting results for the offices. How are we going to get out there so people know the great things that Dr. A.J. and Dr. Mike are trying to do for the profession? We quickly learned we needed insurance.

It's super difficult and not everyone understands it.

The next thing is we knew we needed HR to help us find good people and make sure we were in compliance. Procurement was a part of that somewhere along the way as well. As you grow, you get more leverage with your partners and vendors. How do you start saving money and leverage the size that you have, either to grow more or to give more resources to your offices, and give better services to your patients? And the next part was training and implementing those systems.

The DEO: Please describe your acquisition strategy.

Kristy Walter: We go through a due diligence process where we meet the team to gauge how they are feeling, and what their work behaviors might be. We also open a new bank account so that we can keep deposits from closing day and after from what they had previously. One of the bigger things we evaluate is the practice management system. Whatever the office is using, we stick with that for at least the first few months. The way that we can track our accounts receivable is by setting up a provider type, so we can understand the difference between the old money and the new money.

Mike Olson: We do a lot of work trying to assess how much time we are going to need to spend on marketing, supplies and doctor transition. So, we know going in whether it's going to be a lot of effort or not.

Early on, I remember sitting with Dr. A.J. and thinking, "Wow, we're going to buy this practice, it's going to take a lot of work. Let's follow up with this practice that's \$1 million, but it's running at full steam." It sounds like a great plan: do a hard one, an easy one, hard one, easy one. It doesn't always work out, so you must be flexible.

The way that we can track our accounts receivable is by setting up a provider type, so we can understand the difference between the old money and the new money.

We know that if there are patients coming in the door before we buy them, we are going to implement something that will make them come more often. We're going to take great care of them and give them a great experience. Even if we have a practice that is underperforming, we have a pretty good idea on how we can get them from good to great. Not everything's gone perfectly, but you just have to adjust your approach.

The DEO: What makes DecisionOne unique?

Michael Lovergine: A very important part of our integration, which is not likely in most DSOs, is this relationship-building piece. After the due diligence, before closing, we go in and meet the team alongside the doctor. There's

a very important thing that happens at this moment, because the team that is coming onboard didn't make this decision. The doctor made the decision. No matter how open the relationship was between that doctor and the team, we must give them the space to vent out their feelings and figure out the next step.

What we do that's very special for DecisionOne is we create that safe space. That dialogue is not business-related, but more about them as a person: their goals and aspirations. How can we support that? We are truly, sincerely interested in making sure that we retain the entire staff that has that community involvement, because that's why the patients chose that practice. We make decisions from the patient's perspective. So, we teach that from the very first engagement that we have with the team, and we make sure that they understand that this acquisition isn't a business transaction in the way that they might have thought it would be. I can honestly say this, since I've been here for a few years with all of our acquisitions and transitions, we haven't lost anybody. I'm very proud of that. ■

Finding the Right Lab Partner for Your Dental Practice

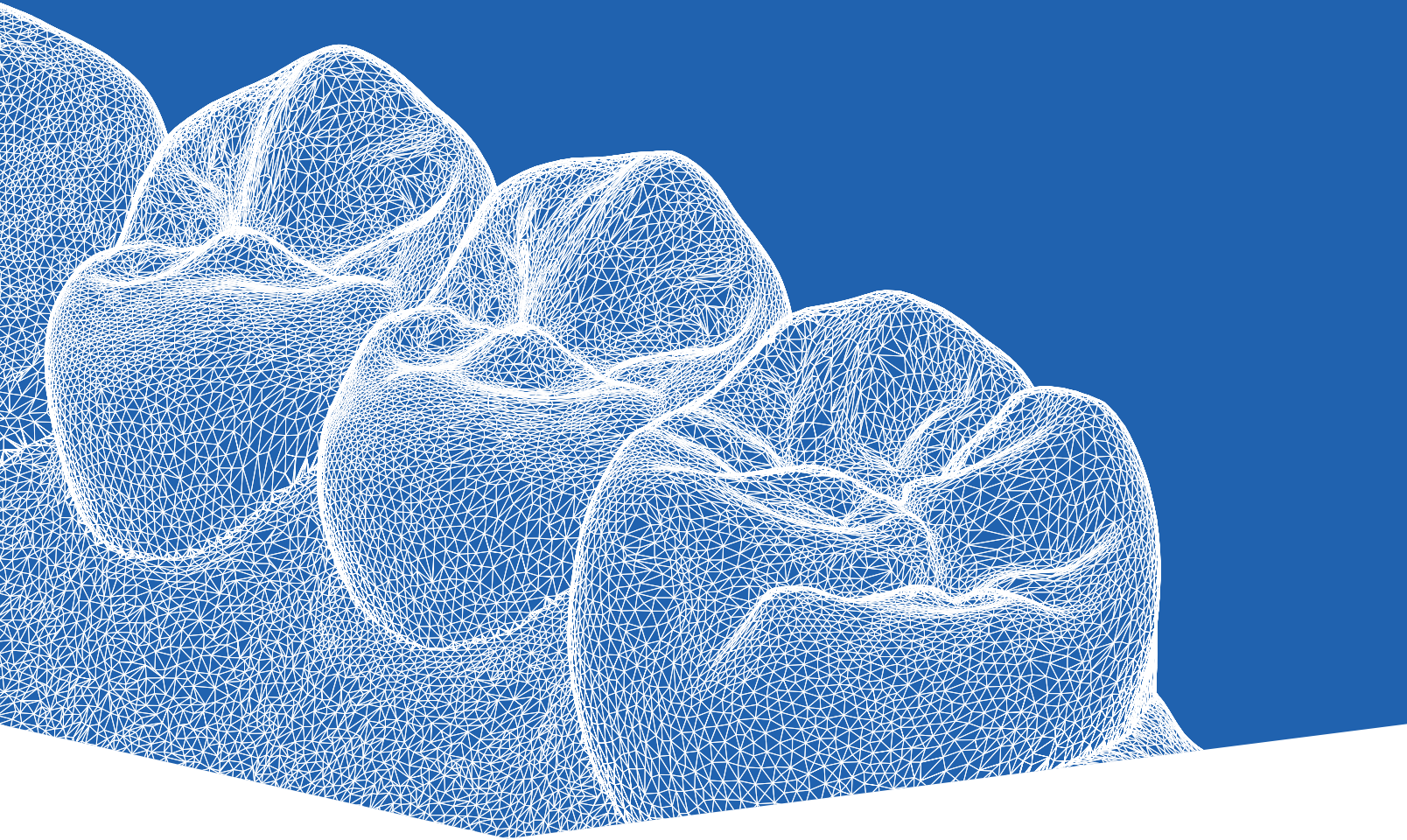


Finding a lab partner is a crucial step for success with growing your dental group practice. It's important to establish a longstanding partnership with a dental lab to ensure that your patients are getting the materials and care that they need.

Dr. Anna Berik has been performing cosmetic dentistry for over 25 years and is one of the country's premier cosmetic dentists. She owns Newton Dental Associates, a unique team-based multi-specialty cosmetic and family dental practice based in Newton, Massachusetts. She partnered with Paramount Dental Studio, the fastest-growing, independent, national dental laboratory in the United States.

Berik said, "Having the right lab is life or death when operating and scaling a practice. It is a true partner. In fact, a practice cannot grow until the details are properly handled. The right lab translates directly into three things that are critical for any dental practice, but in particular, when you are looking to grow your practice: reputation, chairtime, and overhead."

Digital lab work to help you scale.



Paramount Dental Studio is a full-service dental lab that fabricates everything onsite in Huntington Beach, CA.

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Let us know how we could grow together: (434) 282-4862

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Building a reputation

In the world of dentistry, your reputation is one of your most precious resources. Many people look at the prospect of dental work with a sense of apprehension. A reputation for quality patient care will help to ease that apprehension, but it will be harder to maintain without the right lab partner. If your dental lab is creating materials that don't fit, requiring more time in the chair, patients will be less likely to trust your practice.

The difference is that the doctor with the right lab has an extra day of productivity a week.

Berik said, "So, patients might not understand how subgingival the doctor's margins are, but they absolutely understand how the crown fits and how long they are spending in the chair. Fit and chair time directly affect your reputation."

The reputation of your practice will make or break you. "The fit, look, and seating of the crown are instrumental in building a fantastic reputation and the lab influence in this aspect cannot be overstated," Berik said. "If the restorations are poorly fabricated, you spend an inordinate amount of time adjusting – and in a really bad case, the restoration is so off that you would rather not seat it at all. You simply cannot build a robust patient base in this way."

Saving yourself time and money

A weak dental partnership will not only cost you money, but could also

cost you time, the most precious resource of all. With the wrong dental lab, you could have 45 minutes to an hour less of productivity during the day. If your lab is constantly sending bad-fitting crowns, that could put you behind the entire day, often without an opportunity to catch up. Your patients could be waiting for appointments that run over, and some may even have to reschedule to make it work for their schedule.

"Chair time is money," Berik said. "You cannot delegate a crown

seating – it is always doctor time. If I have 45 minutes more in a day because crowns are seating immediately, then I have time to prep two more crowns. On the other hand, a doctor with the wrong lab partner has a 5-minute seating turn into a 30 to 45-minute seating."

A doctor with the right lab spends the same amount of time at work as a doctor with the wrong lab. The difference is that the doctor with the right lab has an extra day of productivity a week. Even if your lab is rebuilding a faulty crown for free, it won't restore your lost time with rescheduling. That lost chair-time is irreplaceable. With the right lab in place, every doctor in the practice is profitable and has extra time.

"When procedures are predictable and repeatable, you save doctor time," Berik said. "And time is money. Of course, the price has to

be right as well. Paramount has very reasonable pricing for the quality that we receive."

Partnering with Paramount Dental Studio

Partnering with a dental laboratory like Paramount Dental Studio allows you to leverage the lab to scale your organization. By processing tens of thousands of cases every month, Paramount has a pretty good idea of which practices will excel in the future just by the way they approach lab work in general.

Additionally, Paramount is preparing for the future by investing time and effort into practicing digital dentistry. Labs of the future will be proactive in fields like artificial intelligence, automation, and digital technology.

Berik said, "Paramount is a fantastic lab. They perform very well on implant cases but our practice uses them for many kinds of restorations. They can process a large volume of cases, enabling us to remain with the same lab as we scale our practice, which is essential to maintaining continuity. Additionally, their leadership is very accessible and I can reach the owner of the lab to discuss issues if I need to." ■



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Digital dentistry propels growth of Lightwave Dental

Doctors and patients smile from the seamless end-to-end digital experience supported by Align Technology

In today's technology-driven world, customers want more than a service; they expect a personalized experience. Dental organizations that double down on the power of digital tools, technologies and workflows have the power to transform patient experiences and grow their practices.

Lightwave Dental, a dental leadership organization (DLO) serving the mid-Atlantic region, has expanded from eight to 69 practices in five years by providing world-class digital tools, technology, training and leadership that drives practice growth.

"Lightwave believes that dentists are the natural leaders of the dental practice and aims to provide tools and structure to preserve the unique identity and legacy of each practice," said Dr. Clifton Cameron, Chief Dental Officer for Lightwave. Dr. Cameron is founder of CarolinasDentist, and began partnering with Lightwave in 2019. "It is truly dentist led."

Changing lives

In today's marketplace, patients don't follow through with treatment as easily in a traditional setup, Dr. Cameron noted. Lightwave seeks to break down the barriers in traditional links between dentists and patients by providing access to streamlined digital workflows along with products and services that patients want.



Dr. Lauren Steddum, CarolinasDentist-Cary, is consistently using her iTero Element as she leads the use of digital tools and technologies in her practice.



Dr. Clifton Cameron

"Invisalign® clear aligner treatment is one of the things that my patients were asking for," said Dr. Cameron. "I am dedicated to finding the best products and right support. Partnering with Align allowed us to create customized educational pathways for our doctors to build their confidence that ultimately helped us meet our increasing patient demand."

Today, Lightwave works with Align Technology, Inc., the manufacturer of iTero Element® intraoral scanners and the Invisalign system,

to drive best practices, technology and leadership training, helping doctors create straighter, healthier smiles for their patients. Through the Align Digital Platform, general dentists have access to an integrated suite of unique, proprietary technologies and services – delivered as a seamless, end-to-end solution – that can help them transform smiles and change lives.

When dental offices are equipped with Align's iTero Element intraoral scanners, patients can be scanned for restorative treatment and to identify high-potential Invisalign aligner treatment opportunities. The scanners are critical to streamline workflows, grow practices, engage patients and give dentists more confidence. A study of general dentists showed an average growth of 120 Invisalign cases in the 12 months post iTero scanner integration, resulting in a six-figure revenue increases for those providers.¹

"We scan all new adult patients on their first visit," Dr. Cameron said. "It inspires patients and creates a 'wow' factor at a peak moment, building the same confidence for our patients that our providers have – and that's a unique recipe to have both patients and providers on the same level."

Treatment planning using the viewer tool allows patients to see their dental and restorative challenges

in 3D, and that helps with chairside patient education.

“It’s an awakening. With awareness comes responsibility and the patients see it and understand it, and will make it happen,” Dr. Cameron explained. “If patients have malocclusion, it’s important to educate and inspire them to no longer ignore it. We do that by making them aware of their teeth shifting and grinding. Establish the concern using the viewer tool. Then show them what’s possible using Invisalign clear aligner therapy using the Invisalign Outcome Simulator. So, when they’re ready, they’ll come back to us.”

Upon investing in five iTero Element intraoral scanners, Dr. Cameron said

doctor confidence grew exponentially. “The Align Digital Platform of tools, technology and education provides doctors the assurance to plan treatment for their patients. This technology is the standard of care.”

When Dr. Cameron partnered with Lightwave in 2019, his relationship with Align helped drive same practice sales growth in its Virginia practices. “Invisalign treatment starts are up 44% year over year in Virginia,” Dr. Cameron said. “Using the iTero scanner, the viewer and the tools have allowed our doctors to communicate more confidently to our patients.”

“Traditional DSOs see 2-3% same store sales growth and we’re seeing

9-10% same store sales growth,” Dr. Cameron continued. “There’s at least one iTero scanner in all Lightwave offices and we’re working to get a second and third iTero scanner in each of our offices.”

“iTero scanners are a great technology,” Dr. Cameron said. “But Align isn’t just a product or supplier. They are a true partner in our educational journey. Lightwave also encourages their doctors to connect with orthodontists, and recently partnered with world-class orthodontic leaders in their markets, creating an even smoother pathway to other specialists, thereby removing traditional barriers to treatment.” ■

¹Study sponsored by Align Technology. Mackay M, Fallah M, Danyal T. Acquisition of a Digital Intraoral Scanning Device: An Examination of Practice Volume Changes and the Economic Impact via an Interrupted Time Series Analysis. Journal of Clinical Dentistry. 2017 Nov;28(Suppl):S1-5.

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The 2021 DEO Fall Summit

“Doubling Dental” helped attendees plan big for 2022 : By Laura Bowles

Every day The DEO strives to achieve its mission of supporting dentist entrepreneurs and dental organization executives by connecting them to the people, education, and resources they need to grow and fulfill their vision. So The DEO appreciates any opportunity for connection and leveling up of the group dentistry’s collective knowledge, like recently at The 2021 DEO Fall Summit, “Doubling Dental” that was held in Orlando, November 11-13.



At The Summit, attendees learned innovative and bold strategies to double their goals in 2022. It was a hybrid event, offered in both a live and a virtual format, and brought together group practice executives, dentist-entrepreneurs, and industry partners from around the country. More than 700 attendees attended live in Orlando and over 100 more attended online. The Summit featured presentations by expert speakers, networking opportunities, time to mingle with exclusively vetted dental industry sponsors, and receptions for fun and strengthening connections.

For the first time since the Fall of 2019, attendees had the option to meet live in Orlando at the JW Marriott Grande Lakes for a learning and networking event like none other. The theme was “Doubling Dental” and presentations focused on how to double profit, revenue, locations, and overall growth of attendees’ dental groups.

Presenters represented some of the fastest-growing and most successful dental groups and DSOs in the country who have doubled and tripled their growth over the past year. These expert speakers shared solutions for the most pressing team, business, and leadership challenges faced when scaling a dental organization.

The stellar lineup of speakers and topics include:

- › **Geoff Ligibel**, President & CEO, 42 North Dental (75+ locations), and Dr. AJ Acierno, CEO & Co-Founder, DecisionOne Dental (32+ locations) will present “How to Double Dentistry While Maintaining Quality of Care”.
- › **Dr. Michael Riccobene**, Founder & CEO, Riccobene

Associates (55+ locations), will present “A Scaling Story – from Emerging Group to DSO: 0 to 55+ Locations and Beyond”.

- › **Vince Dilley**, Founder & CEO, Platinum Dental Services (22+ locations) and Platinum Recall Services will present “How To Double Patient Recall and Reactivation at Scale”.

- › **Justin Jory**, Founder & CEO, and Dr. Clifton Cameron, Chief Dental Officer both of Light-wave Dental (48+ locations), will present: “How To Double Growth Through Doctor-Partner Alignment”.

- › **Josey Sewell**, Founder, joy-FULL People, will present “How To Get Your Team To ‘Buy-In’ To Your Scaling Vision”.

- › **Ken Kaufman**, CFO, Community Dental Partners (90+ locations) and Nathan Chitty, CFO & Director of Business Development, Operation Dental (8+ locations), will present “How to Diagnose Growth Opportunities in a P&L”.

- › **Dr. Kwane Watson**, Founder & CEO, Kare Mobile, Inc., will present “How To Double Patient Access with Mobile Dentistry”.

- › **Dee Fischer**, CEO, Fischer Professional Group, will present

“How To Maximize Opportunities In Practice Schedule.”

► **Dr. Paul Goodman**, Founder, Dental Nachos and Dentist Job Connect, will present “How To Recruit Associates Ready for Growth.”

► **Alyssa Keefer**, Founder, and MarTech Guru, joyFULL People, will present “How To Double New Patients in De Novos and Acquisitions”.

► **Jake Puhl**, CEO of The DEO, will present “Emerging Group Dentistry Now and Beyond: The

Path To Doubling Your Dental Organization’s Success”.

These Summit speakers were hand-picked by The DEO so attendees could learn from those who have “been there, done that” and hear their recipes for growth. This group of esteemed dentistry leaders offered attendees

proven implementable tactics they’d learned from hard-won experience.

The DEO has their finger on the pulse of what works and what doesn’t, having helped 100s of dental organization leaders successfully scale. The Summit was planned to help attendees think BIG for their goals in 2022. ■

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For more details go to deodentalgroup.com/growth-summit.



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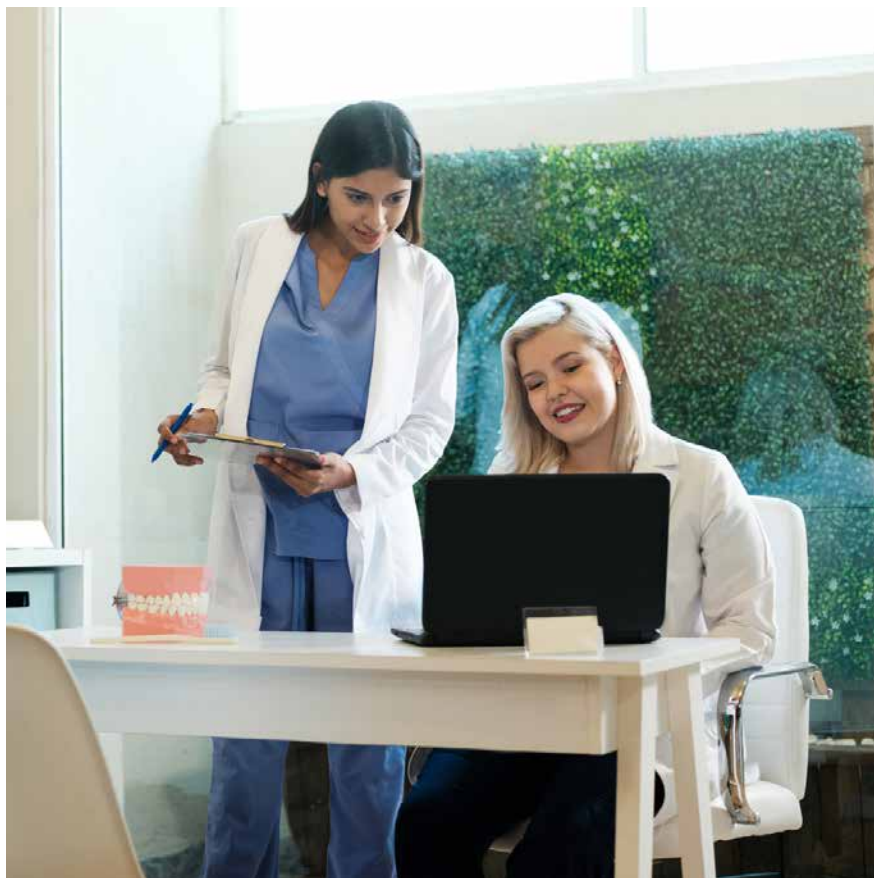
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Automated and efficient patient A/R collections for dental group practices



CFI is a leading fintech company offering financial solutions for dental providers to increase their revenue management and profitability. CFI currently serves thousands of dental and medical practices across the U.S. Abella, one of their proprietary platforms, offers automated patient accounts receivable management for dental group practices. CFI's human approach to revenue management has established the company among the fastest-growing fintech providers in the healthcare industry.

In 2018, CFI began hearing from dentists how challenging patient A/R was to manage. Many times, insurance payments would come back and not cover the full cost of treatment, meaning that the patient was suddenly stuck with a “surprise” balance. The practice would then make phone calls and mail statements to patients, but there was little to no insight or engagement, making the efforts ineffective and costly.

To solve that pain point for their dental group practice customers, CFI created Abella, a patient accounts receivable (A/R) software that gives patients a way to pay their outstanding balances either in full or by choosing a monthly payment plan – directly from their smart device.

Abella creates efficiencies for both the group practice and the patient

Abella easily integrates with all leading practice management software and looks for the patients who have a balance with the practice, but don't have any open insurance claims that are still pending payment. Abella was designed with growth-oriented group practices in mind. Not only will it integrate with a practice's existing software, but it is also designed to scale with the organization as it grows.

The Abella software sends text messages and email communications that are branded for each location so that patients know it's coming from the dental practice and isn't a scam. If a patient doesn't acknowledge the message right away, Abella automates the follow-up process so that the dental team can spend more time with the patients who are in the office and in the chair.

Operationally for the practice and the team members, nothing really changes, except that they



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Patients pay quickly and easily

Patients have immediate access to pay off their balance or pick a monthly payment plan that works for them so you can get paid faster and more efficiently.



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The only A/R software that makes you more efficient, improves collections and strengthens patient loyalty.



Your patient A/R is loaded into the Abella software



Patients receive a link to view/pay their eStatement via SMS and email



SMS and email follow-up that is frequent, friendly and consistent



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no longer have to spend time and money to send paper statements and make phone calls. Abella simply automates the collections and follow-up process for the practice making managing patient A/R a breeze.

Valuable Insights

Manual patient A/R collections is time consuming for team members, and the practice has very little way to determine what's working and where their priorities should be. Abella makes it easy to get visibility and insight into the payment data. For instance, users can easily sort the data by region or by location. They can see things like average days to receive payment, outstanding balances, which patients are paying, how quickly they pay based on their last visit date, and more. Essentially anything you can dream of, Abella can make available and visible to the group practice, and in real time.

ROI

Abella boasts a strong track record. The company says that historically, Abella has been able to collect anywhere from 5% to 30% of a practice's 90-day patient A/R after they first engage with them. All in all, it amounts to a significant amount of money that most group practices have otherwise given up on.

Statistically, of the patients who pay in full, about 35% of them pay on the first or second e-statement message, the company says. Patients who get the messages are making the payment within seven days, which means the practice is collecting 35% of what is owed to the practice

before a paper statement could even hit the patient's mailbox. This means practices are getting money in faster and increasing their revenue for the year.

Seamless Patient Experience

The company points to its seamless, patient-focused workflow as the reason for this success. From a patient standpoint, phone calls, especially phone calls about owing money, are intrusive and can be disruptive to their day.

With that in mind, Abella has created a process that removes as much friction as possible from the process for the consumer. Consumers don't want to have to download an app or set up an account to

make payments, especially when the amounts are small. With Abella's process, when patients get the text or email, all they have to do is click the link to see and pay their balance. The message takes them right in to see what they owe, why they owe it, and gives them the ability to click and pay right there or opt in for a short-term payment plan.

From the patient's perspective, the communications from Abella are frequent, friendly, and consistent. Ultimately, it gives patients the ability to easily pay their balance, without downloading an app, without registering and giving any additional information, all on their own time at their convenience. To learn more visit abellaar.com. ■

Recovered \$70K of problematic AR in 1st 60 days

"We had 300 accounts in 90+ days in AR so the decision to go forward with Abella was a no brainer. The same collections results would have taken a team member months mostly driven by unanswered/unwanted calls to the patient. The return on investment for our group was very high and our patients now have an easy way to pay."

— Callie Ward, Corson Dental Group

With Abella, we collected from people with accounts 2-3 years old that ignored traditional methods.
(phone calls and mailings)



Community Dental Partners and 3C Dental Group announce partnership

Community Dental Partners (CDP) announced a new partnership with 3C Dental Group, a dental support organization with 20 locations. “This partnership allows for a ripple effect of incredible patient care experience to spread across the often rural areas of their supported Texas practices,” CDP said in a release.

Says Emmet Scott, co-founder of Community Dental Partners, “Dr. Dhaval Thakkar and Kelly Thakkar have built an organization that is perfectly aligned with the culture and quality of care that is part of Community Dental Partner’s model and mission. We are so excited about this win-win work that allows us to provide them the support needed to expand their reach, supporting more underserved patients, while we learn in return from their invaluable expertise in the adult dentistry space.”

Says Dr. Dhaval Thakkar, DMD, Owner of 3C Dental Group, “The choice to join forces with CDP was made easy the more we realized we were aligning with a team whose values, culture, and dedication to a higher purpose – a mission to bring exemplary dental care to communities who are normally underserved – was perfectly aligned with ours. With this merger and collaboration, I’m confident we’ll be able to create a bigger impact with 3C’s vision of serving patients and team members.”

Guardian Dentistry Partners secures over \$100M financing

Guardian Dentistry Partners announced that it has secured more

than \$100 million in debt financing from Twin Brook Capital Partners, a leading direct lending finance company. Guardian, which has seen its dental partnerships across the country grow exponentially since its founding in 2018, said it is “now well-positioned to continue to forge powerful strategic partnerships” in the months and years to come.

“This financing is reflective of confidence in our business plan and in our incredible dental entrepreneur founders and partners,” said Mark Censoprano, GDP’s President. “With Twin Brook’s support, we are now primed to grow even more quickly, and we’re confident we will achieve our objectives.”

In the coming months Guardian said it is expected to announce new partnerships with nearly 30 dental practices across the Eastern United States, including partnerships in two new states. “2021 is proving to be a hallmark expansion year for Guardian,” said Dr. Hisham Barakat, Chief Clinical Officer at GDP. “We’re proud, and humbled, to have the opportunity to support so many amazing partners in their journeys to build the practices of their dreams.”

42 North Dental Partners with American Diabetes Association

In November, in recognition of American Diabetes Month, 42 North Dental partnered with the American Diabetes Association (ADA) to raise awareness of diabetes and prediabetes with their shared patient communities. According to 42 North Dental, proper oral health-care can potentially detect and help manage diabetes. As part of this

partnership, 42 North Dental will include an “Oral Care & Diabetes” page on each of its practice websites which will include the ADA’s Type 2 Diabetes Risk Assessment Test. Patients, and prospective patients will be able to answer questions in 60 seconds to assess their level of risk and access resources of how to proceed. Materials will also be available to patients in-office and clinical providers will receive ongoing training and resources to best meet the needs of patients with diabetes and prediabetes.

North American Dental Group names new CFO, IT security team

North American Dental Group (NADG) has promoted Stephen Castles as its next CFO. In this role, he will be responsible for managing the day-to-day financial operations of the company and the 250 dental practices across 15 states that NADG supports. Castles joined NADG in January as VP of Finance and Corporate Development where he oversaw many aspects of NADG’s corporate finance functions and supported the company’s affiliation efforts. Castles succeeds Jonathan Walker, who recently was promoted to CEO. The company also announced it has promoted Dan Romary to chief information officer (CIO) and hired Jim Nelms for the newly created role of chief information security officer (CISO). Romary, who joined NADG in July 2020, had been VP of Data Analytics and Enterprise Applications. Nelms most recently worked as CISO for LabCorp, a leading healthcare diagnostics company.

Cloud-Based Dental Practice Management Software Program Recommendations

Editor's note: **The DSO Secrets:** *Dentist Entrepreneurs Growing Dental Organizations Facebook page is a place to find resources, networking opportunities, information about upcoming industry events, and a forum to ask fellow dentist entrepreneurs questions you may have about running your business. The following was a recent discussion among DSO Secrets Facebook page members.*



AJ Giesa asked: Any recommendations for a proven and efficient “Cloud-Based Dental Practice Management Software Program” with great customer service/support?

DSO Secrets Facebook page members responded:

“I really like Fuse. It’s great for multiple locations and the support is fantastic.” – **Tony Le**

“Whether you’ve got one location or many, Dentrix Ascend is a great option and worth setting up a live online demo for.” – **Danny Jessop**

“I love the race that is happening for better solutions. It’s becoming more possible because we, the customer, are asking for better solutions. I think I’ve ridden

Opendental as far as it can go. I have 15 programmers working to consistently build new solutions for my team needs with Opendental as the backbone. I’m excited for one of these cloud solutions to become the Holy Grail. I’m personally doing a lot of work with Tab32 and do see them leading in some areas but feel the door is very much open and that no one has everything I want ... yet. I’d love for someone to put together a side by side of Denticon, Carestack, Tab32 and any other cloud solution that wants to get in the octagon. I do think each has

different use cases as well that need to be called out.” – **Emmet Scott**

“Denticon is a fantastic program with great support.” – **Eddie Bee**

“Tab32. I’ve used over 5 cloud platforms including Denticon, Ascend and Curve. Tab32 and carestack are the best in my opinion.” – **Tom LaGree**

“You will always get a mixed bag with this question. People tend to favor what they are comfortable with. We have worked with several groups and emerging DSOs so what I share is based on what we are seeing and hearing in the larger market. The most consistently favored options are Tab32, Carestack and Private Cloud Open Dental. If you check some of the past postings, you can see that Emmet Scott is hearing the same things. Regardless, I recommend conducting multiple demos with key members of your team. What works well for one group, may not be ideal for the way another operates.” – **Tom Terronez** ■



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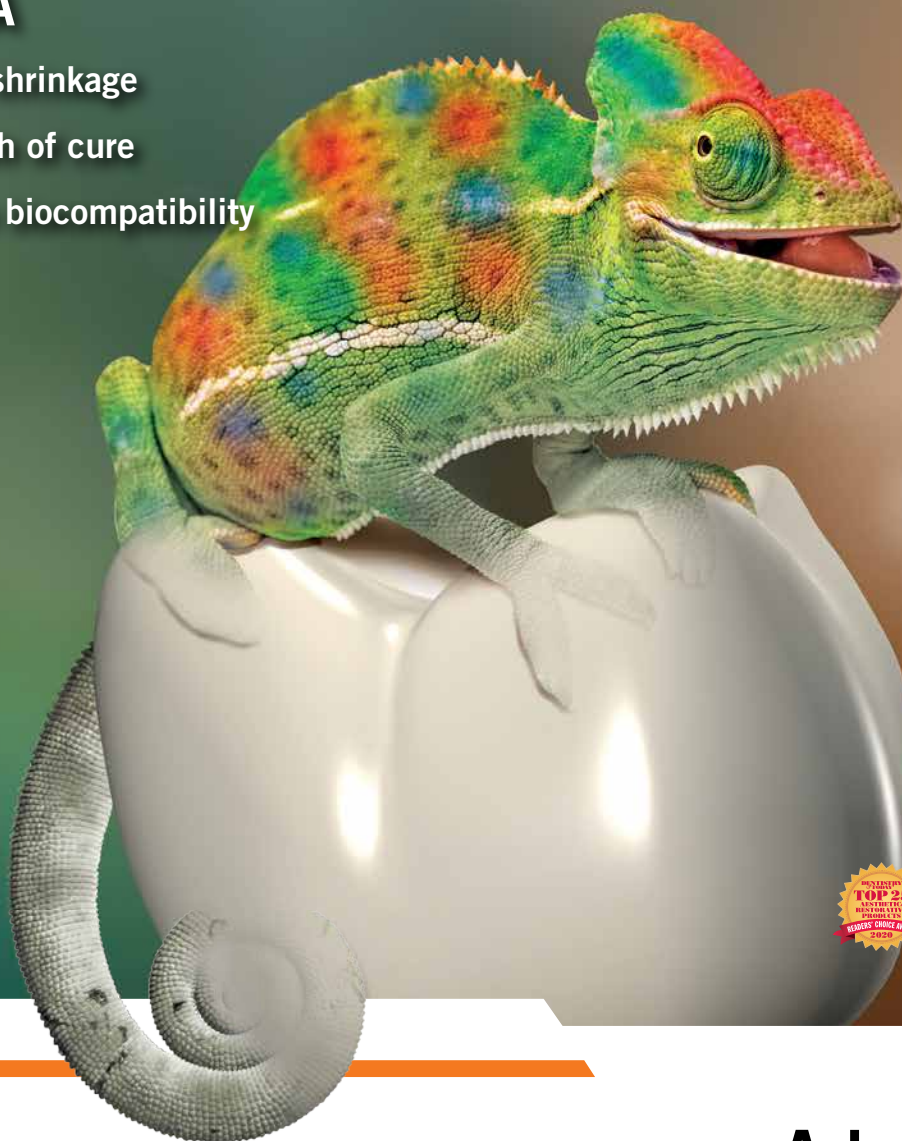


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