

# DE◊MAGAZINE

DENTIST ENTREPRENEUR ORGANIZATION

## How To Prepare For Your Successful Hiring

Josey Sewell & Dr. Eric Roman



JANUARY/FEBRUARY : 2022  
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# Supporting Your Journey

By Jake Puhl

**Welcome to 2022! This issue marks the official rebrand of DEO Magazine. With a full year under our belt** publishing the magazine, we've got a solid foundation of how to glean insights from the thought leaders in dental entrepreneurship and deliver them to our ever-growing community of like-minded leaders. We believe this brand name will help us reach a wider audience with best practices, engaging interviews, and education in the group space as The DEO continues to come alongside dentists and executives to help them fulfill their future visions.



The DEO continues to find ways to support dental leaders on their growth journeys. To that end, in 2021, we announced that The DEO acquired both Traction for Dental and joyFull People. **Traction for Dental** was the only Certified EOS® Implementation business focused solely on multi-location dental companies, while its sister company, **joyFULL People**, serves the industry with simple, 24/7 online curriculum for finding, managing, and growing millennial dental teams.

As I said at the time of the acquisition, many of our fastest-growing member businesses were already working with Traction for Dental, and many more were preparing to. We serve the same unique market in two totally symbiotic ways, so growing into one company was inevitable and exciting. We believe the combined businesses will bring massive new value to growth-focused, entrepreneurial dental leaders.

And we're thrilled to have the innovators behind those businesses, Dr. Eric Roman and Josey Sewell, on board as partners at The DEO. In fact, for this issue's cover story, Eric and Josey help us take a deep dive into best practices for hiring, recruiting, and retaining associates/staff in a chaotic marketplace.

Indeed, the January-February issue is jam-packed with tips and tricks from topics such as creating a culture of excellence, improving your HR department and strategy, navigating job offers for potential team members, the secret to onboarding top-flight talent and much, much more.

Cheers!

**Jake Puhl**



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# Building the Future of the Dental Workforce

BY ANDREW SMITH, EXECUTIVE DIRECTOR OF THE ADSO

**As the dental industry continues** to recover from the COVID-19 pandemic, organizations are facing significant staffing challenges. While the demand for oral health care remains at an all-time high, the industry's workforce level remains low, creating a unique challenge for dentistry in terms of providing access to care.

These labor shortages, of course, go beyond immediate recruitment and retention. The dental support organization (DSO) model is designed to attract future talent – providing the necessary tools for individual dentists' sustained growth and success. DSOs are also proactive in advocating for dental students in and outside of the practice, with benefits including access to proven technologies, strategic mentorship programs, networking opportunities, and a culture predicated on a healthy work-life balance.

## Increased work-life balance

When making the jump from dental school to practicing, new graduates often encounter high startup costs, inaccessible growth opportunities, and an overflow of administrative tasks. According to the American Dental Education Association, 2020 dental school graduates with federal loans owed an average of nearly \$305,000. DSOs play a critical role

in helping alleviate these burdens of practice management by managing a wide array of responsibilities including procurement, marketing, human resources, compliance, IT and finance; enabling dentists to focus on what matters most: the health of their patients. Teams operating within a supported organization also spend less time on the administrative aspects of a practice, which ultimately improves the level of quality care they are able to provide patients.



## Access to innovative technologies

Partnering with a DSO also significantly reduces the overhead costs associated with operating a practice. For example, the integration of artificial intelligence (AI), fully integrated healthcare systems and other digital workflow processes that improve the patient experience require a great deal of resources and coordination, which, because of their unique infrastructure, DSOs are able to provide

more readily, efficiently and effectively. Prioritizing innovation in this way also creates greater opportunities for individual growth, streamlines the administrative processes, and moves the dial forward for the dental industry as a whole.

## Enhanced professional development

When partnering with a DSO, the dental staff has access to mentoring and networking opportunities. There is a large network of dental professionals who provide support and insight into their careers, serving as mentors for younger dentists, dental hygienists and dental assistants. With access to a widespread network, practices operate as a community and support collaboration, education and advocacy, elevating the industry and enriching oral health care.

Finally, on the topic of opportunities for networking and leadership development, the ADSO looks forward to seeing the future of the industry at the 2022 ADSO Summit in Austin, Texas from March 29 to April 1. During the Best Practice and Deep Dive Days, there will be unique opportunities for DSO leaders to connect with dental students, paving the path forward and creating A New Dawn for Dentistry. Visit the 2022 ADSO Summit to learn more about the premier dental industry event. ■





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# The Key to Fixing Smiles

An emphasis on personal and professional development has led to financial and interpersonal “wins” at Potomac Dental Centre : By Graham Garrison



**About six years ago, Dr. Everett Eklund met a fellow dentist, Tony Feck, who invited him to be a part of a peer group called Sunrise Dental Solutions. While Dr. Eklund was excited about the group, he had no idea at the time how transformative it would be for both his career and dental practice, Maryland-based Potomac Dental Centre.**

The first book Dr. Eklund read with his team was called “Everybody Matters”, co-written by Bob Chapman, a venture capitalist who purchased blue collar businesses like welding manufacturers and transformed them into successful enterprises using, of all things, culture. “Over a 20-year period, his companies outperformed Warren Buffet and Berkshire,” Dr. Eklund said. “And he did it by changing culture and transforming lives. That really struck a nerve with me.”

Dr. Eklund decided to deploy the same strategy at Potomac. He and his team would read books together and then talk about it. Dr. Eklund said he could see a change happening. Both he and Potomac’s team members were more open and vulnerable in their conversations. Some of the team members even approached Dr. Eklund to tell him that he had changed, that he was “hardly the same boss” as he was before.

While those changes might have been subtle, there were some tangible

benefits that arose. Revenue started to take off. Potomac went from a single doctor practice with deposits of about \$1 million, to in a few years being a 2-doctor practice (Dr. Eklund brought on an associate) with deposits of \$4 million. “When we hit the \$4 million mark, my team put a big Congratulations sign on my chair in my office,” Dr. Eklund said. “They were celebrating it more than me.”

## Personal and professional growth

Dr. Eklund said being vulnerable with his team, and being interested in their growth as human beings, are what led to their financial success. Potomac Dental Centre uses a ladder system in which each department has steps team members can take for their personal growth, “and we provide the training opportunities so that the team members can take those steps,” Dr. Eklund said. At each monthly meeting when an employee goes from one level to the next, Potomac makes a big deal out of it. “We really celebrate it.” Party hats, kazoos, everyone clapping and cheering – it shows the team members a lot of support.

The ladder system is also way to provide transparency for team members on what Potomac as an organization can offer. Each level on the ladder has salary ranges. “So someone who comes here can see that they can take steps to not only have an enriching career in dentistry, but



they'll understand how it can put them on a path that will enable their financial goals, like buying a house. We want them to feel that financially they're in the right place."

In the spring of 2021, Potomac tried some typical ways of filling positions via job listing websites, but didn't get a response. Dr. Eklund said an ad on Facebook from The DEO about its upcoming Fall Summit attracted his attention. "I could see that their focus was on culture, building not just stronger businesses in dentistry, but having happier lives of all the people that are part of it," he said. Dr. Eklund signed he and his daughter up for the Summit. His daughter lives in California while working on a master's degree, but also helps Potomac's marketing efforts.

Dr. Eklund said The DEO's Fall Summit was tremendously helpful in learning best practices in connecting and recruiting. When he returned to the office, he began implementing what he learned. "We took our core values, and made that a part of our recruitment pitch," he said. "We basically said that if these values are important to you, come work with us. If these things aren't important to you, find another place to work. We did it in fun, but it was real, direct." They also ran ads in Zip Recruiter and leveraged social media. "In less than 30 days, we had over 90 applicants for hygiene, front office, and dental assisting."

### Using your gifts

Culture extends to how Potomac treats its patients. Before any cleanings, X-rays or examinations are

done, the staff – as well as Dr. Eklund – sit down with each patient. "We just try to connect with them like a human being," he said. "We'll find out things in their life. Not everyone's open enough to share those things, but a lot of people are, and we'll see what areas of their life that they have deficiencies in regarding their ability to eat or their smile."



For instance, a grandmother told Potomac team members about the time one of her grandkids asked why her teeth looked "that way," while another patient recounted how he feels too embarrassed to eat in a social setting. Dr. Eklund said he and his team might spend a combined hour with the patient in the chair before they get to the examination. "Once we find the holes in their life, we can fix the holes in their smile."

Patients come to Potomac because they feel like there's something "different about us," Dr. Eklund said. He and his team aren't driven

by revenue. They want to make an impact in their community. The Potomac team wants to win and it shows with the increased revenue, and how many more lives have been changed.

Dr. Eklund said he wants to give even more opportunities for those stories to grow, as well as his team members to grow, in 2022, but having one office has limited that.

So, he is looking to branch out into another location.

"I have a deal with my staff," he said. "I told them I want to develop them professionally. They're too good for me. There's no reason why they should be working at my office because they're too skilled. So the other side of the coin is it's up to me to find opportunities to use and fulfill their gifts. That's driving me to prepare to open another practice, and hopefully this will lead to a string of practices – not so that I can work harder, but so I can give opportunities to my team members to express those gifts that are growing in them." ■

# Bringing Dental Practice Data into the Cloud

Open Data Warehouse pioneer tab32 is revolutionizing the dental sector

**People might not think of their local dentist's office as a prime target for technological disruption — but that's exactly what cloud-tech innovator tab32 has set out to do.** In the 8 years since Kiltesh Patel founded the company, he has seen the industry embrace new technologies and evolve their data practices. Today's dentists, he says, are much more sophisticated in their use of data and software to deliver cutting-edge care for patients, even in the face of pandemic-related challenges.

"Today's dental practices, and especially Dental Services Organizations, are increasingly relying on cloud tech and Open Data Warehouse technologies to coordinate their operations," Patel explained. "Just like any other sector, the dental industry is increasingly powered by data — and dentists and DSOs recognize the need for technologies that let them access, share, and use that data effectively."

To support that transformation, tab32 has developed industry-leading cloud Dental Practice Management Software (DPMS) — a patient-first solution that delivers comprehensive patient experiences through the entire value chain of the care continuum. Now, tab32 is extending its offering with Open Data Warehouse, the industry's only data

warehouse solution, using next-generation data science and machine learning features to revolutionize patient care and enable practices and DSOs to unlock growth opportunities.



## The power of data

The game-changing Open Data Warehouse feature gives practices and DSOs on tab32's platform full access to all of their data, allowing them to customize their reports and access analytics and business insights they didn't previously have. "Our Open Data Warehouse is practice management agnostic," said tab32's Chief Strategy Officer Melissa LuVisi. "It's incredibly powerful if you're on the tab32 platform. But you don't have to be on our platform to get access to our Open Data Warehouse product."

In fact, one key innovation underpinning tab32's Open Data Warehouse is its commitment to data interoperability. As patients move between orthodontists, pediatric

dentists, oral surgeons, anesthesiologists, and other specialists, tab32 makes their data instantly available, enabling seamless communication and freeing both practitioners and admin staff from the burden of tracking down scattered records.

Those capabilities are increasingly important as practices grow, LuVisi explained. Transitioning to the cloud is an important investment as dental businesses prepare for future growth, and it's easiest to implement early in your growth journey. "You might think you're too small to need a coordinated data solution, but it's always best to implement cloud-based tech before you run into problems," she said. "Your data infrastructure should support and enable your growth, not constrain it."

As the dental industry moves toward a DSO-led model, with practices joining into larger groups, such solutions will become increasingly important. Leveraging tab32's Open Data Warehouse gives leaders visibility into all aspects of their business, across multiple practices, enabling them to make forecasts, unlock new efficiencies, and plan for their changing strategic needs. "The pandemic brought challenges for the dental industry," LuVisi acknowledged. "At tab32, we're giving DSOs and practitioners the tools they need to adapt and thrive." ■

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# The Secret to A+ Onboarding and Retention

By Dr. Craig Copeland

**Your doctors are the heart and soul of your organization, so there's** nothing more important than hiring and keeping the right people. Success when it comes to retention isn't tied to compensation or benefits, and it doesn't come from recruiting people based only on their clinical qualifications. Dental skills can be developed, but creating the right culture isn't as easy.



Solid retention starts by recruiting people who are going to fit in culturally, and who buy into everything your organization is about. At Community Dental Partners (CDP), we invested in creating a central guiding vision and a clinical constitution that permeates the entire organization.

Everything we've done at Community Dental Partners comes from a culture built on relationships, not on transactions.

For us, that started by making an investment to create a culture that our doctors wanted to stay with. A huge part of that comes from having

a vision with a definite structure that gives them a foundation upon which they can build success. That central vision is shared by everyone we hire and it makes it easy for our doctors, and prospective doctors, to see a realistic, tangible future where they can eventually own practices, in which they can grow and become a better leader, a better person, a better wife, father, husband — anything you can think of. That's what we're trying to drive and that's what has led to great retention.

If you have a clear vision set out for your doctors, and if you're relationship-minded, then everything will reflect that mindset and everything else will fall into place.

## Transparency the whole way through

It all starts with transparency. From our first contact with potential recruits, we lay out exactly who we are and what we expect out of our doctors. But more than that, we show it to them.

All of our doctors are with us for a reason. So I always encourage new doctors who are coming in to ask everyone about everything — every side of it. I'd rather a potential new hire find out everything about us — the good, bad, and ugly — before they come in.

The reason is simple, I want them to come in day one and not

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have any surprises. I can do that because I'm confident in our culture and that we all share the same vision.

### **Know what you want out of your dentists**

For us, the most critical quality is being a good culture fit for the organization – embracing the same ideals and having a desire to work toward the same goals. We don't want transactional relationships with our dentists any more than we want them with people in our personal lives.

For me, the biggest joy is seeing other people in our organization succeed. Because as they succeed, we all succeed. That's why I want someone that I can get to know – someone who I can mentor and get along with, and see them have success.

We created a document that walks perspectives through how we're going to pay them. In fact, we even created a worksheet they can take with them to other interviews so they can compare our offer to their other offers.

Since we've been giving that worksheet to the incoming docs, we've had a ton of success when it comes to onboarding the right people. Not only does it set expectations (both ways) from the start, but since we make those expectations known they first come on, we have fewer issues down the line.

### **Finding future partners**

We have a saying, "What starts well, ends well." While a resume can tell us about the person from a clinical qualification standpoint, the first step in our onboarding process is evaluating candidates from a culture fit standpoint.

Our recruiter goes through and asks the right questions. She doesn't actually dive into the clinical part, but she's the filter of that culture piece, and doesn't let anybody pass unless they seem like they're going to fit in culturally.

Another unique thing we are very adamant about is having the spouse be involved in every step of the recruiting. When we have dinners, we almost make it a requirement that the doctor bring his or her spouse, because at the end of the day, the spouse is going to be a huge part of any major decision.

The real light bulb moment for us was when we shifted our mindset from "hiring new doctors" to "finding future partners." Having that mindset completely changed the way that we view them and the way they view us.

## **While a resume can tell us about the person from a clinical qualification standpoint, the first step in our onboarding process is evaluating candidates from a culture fit standpoint.**

We start talking about the path to ownership while we're still in the recruitment phase, long before anyone has even brought up signing any papers. There's of course certain requirements that they need to hit along the way to that goal of ownership, but our full intention from the outset is for them to become partners with us someday, and we tell them that. The byproduct of that practice has been great retention rates.

When it comes down to it, the real secret to success isn't enticing sign-on bonuses, perfectly written contracts, or hitting the right formula for compensation. Instead, success comes from building great relationships on the foundation of a shared vision. It's how we get our doctors to partner with us, it's how we get them to stay, and it's how we help them succeed. ■

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**Dr. Craig Copeland** is the Chief Dental Officer of Community Dental Partners and focuses on helping CDP's doctors exceed in their careers, through mentorship, training, and strengthening CDP's support systems.

# Democratizing Access to Healthcare

Brendon Kensel, Founder & CEO of PrimaHealth Credit, discusses his organization's mission to disrupt patient finance and democratize access to care.



Brendon Kensel

**When it comes to helping patients move forward with treatment, the reality is that not enough people can afford the care they need, and finance companies aren't meeting the needs of patients or providers. That's why DSOs often juggle several finance partners in hopes of getting their patients approved for care.**

"This is an inefficient process and practices are absolutely overwhelmed navigating multiple credit solutions with low approval rates and partial approvals," said Brendon Kensel, Founder & CEO of PrimaHealth

Credit. "All of this results in a terrible experience for patients with providers treating fewer people. In short, the experience is broken, and not enough people are getting approved for care."

In the following Q&A, Kensel discussed the reasons behind why he launched a patient finance company, and how PrimaHealth can help DSOs expand access to care.

**Q: Why do so many patients get denied for financing?**

**Kensel:** Traditional patient finance companies deny more than 50% of people who apply for financing because of tight credit requirements that cater to patients with prime to super-prime credit. From a business standpoint, DSOs require a better solution considering there are over 160 million Americans with non-prime credit. Providers need one, turnkey patient finance solution that allows them to serve patients across the income and credit spectrum.

**Q: Why did you decide to tackle these issues and launch your own patient finance company?**

**Kensel:** As a former operator of an orthodontic DSO, I was so frustrated with the process of helping my patients get approved for care. I saw first-hand how patients struggled to pay for out-of-pocket expenses and it was heartbreaking when they could not get approved for financing for themselves or their children. We offered a house payment plan for patients who were denied financing, but that wasn't a great solution either



because we did not know a patient's ability to pay, and we were not great at collecting payments from our own patients. I knew there had to be a better way, so I decided to build the patient finance platform I wish I had when I was operating my DSO.

**Q: How is PrimaHealth Credit different from other finance companies? Why did the world need another finance solution?**

**Kensel:** We are on a mission to democratize access to care. And that is not something you hear very often in patient finance. It's easy to finance those with excellent credit. But that leaves too many people without access to care. I started PrimaHealth Credit because the industry needed one patient finance solution that could approve most patients with one credit application. So that's what we did. In partnership with Citizens Bank we launched the Greenlight program, a one-application-for-everyone solution that approves up to 90% of people so providers can treat more patients, and patients can get the care they need with an affordable monthly payment.

Unlike other patient finance solutions, the PrimaHealth Credit and Citizens Bank partnership brings the agility of a fintech with the strength of a bank to deliver a world class experience that finally addresses market needs: one application, instant approvals, real-time reporting, and a custom finance program built for dental and orthodontic practices.

**Q: Why is it important for you to help as many people as possible access care?**

**Kensel:** Limited access to financial solutions means limited access to care. We want to change that. Serving credit challenged and underbanked patients doesn't have to be a scary or unprofitable proposition. There are so many reasons why someone might have credit that isn't perfect including students, people with low income, or a brief period of unemployment due to hardships such as

**“Transparency, fairness, and accessibility are the table stakes. In the future, providers will stop juggling multiple financing solutions and will instead build a deep partnership with a finance partner who actively participates in the growth and success of their business.”**

COVID. And the way you approach approving people who don't have great credit isn't with traditional underwriting. You need sophisticated credit analytics that can analyze hundreds of attributes to assess a patient's ability to pay. That's our superpower. We've built a platform that delivers deep credit analytics and machine learning to accurately match patients to payments they can afford. There's no reason why only prime credit customers should be able to access patient finance solutions to pay for their care over time. We help more patients get approved so practices can profitably care for more people.

**Q: How much additional revenue can practices expect to add to their business?**

**Kensel:** Great question. We build patient finance programs for our partners that are specific to their business: their terms, their payback options and their risk tolerance. We are helping providers grow production by up to 20%, while reducing bad debt write-offs and increasing cash flow.

**Q: What does the future of patient finance look like?**

**Kensel:** Technology will continue to help transform healthcare so more patients can access the care they need, and providers can just focus on providing great care. Transparency, fairness, and accessibility are the table stakes. In the future, providers will stop juggling multiple financing solutions and will instead build a deep partnership with a finance partner who actively participates in the growth and success of their business. That's the PrimaHealth Credit model today. And we continue to innovate to deliver experiences and solutions that make the patient finance experience as simple, honest and helpful as possible. ■

# Creating a Culture of Excellence

Why culture is the most valuable asset you have as a dental leader : By Dr. Yahya Mansour, Co-Founder and Chief Dental Officer, Rodeo Dental & Orthodontics



**The average pit stop in the first Formula 1 (F1) auto racing championship** took over one minute in 1950. Today, the average F1 pit stop takes 2.5 seconds. Things change for the better if we are committed to learning and relearning.

Managing offices in a top-down hierarchical approach is outdated. Today, it's about a culture of camaraderie through empathy, collaboration and teamwork. That's how we've grown Rodeo Dental & Orthodontics to 34 locations in two states with more than 100 full-

time doctors. We've won awards like "Best Place to Work For" and "Best Dentist" by *D Magazine*, and it's our culture and people that pushed us there.

We all need a formidable team just like the F1 pit stop crew all rely on each other, and each piece is

dependent on the other. The key is hiring people that are good at what you're not and that are a good culture fit. Culture is the most valuable asset you have as a dental leader, and it doesn't show on your balance sheet, but it's been the key to scaling Rodeo Dental & Orthodontics.

As the son of two dentists, I grew up in a solo practice and I've seen dentistry evolve. But living by the Golden Rule and following simple tenets are as important today as they were back then. Treat

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your people right and they will go above and beyond for your patients and organization.

### **The root that bears the fruit**

Culture is a living and breathing organism within your organization. It's the root that bears the fruit and must be constantly nourished, promoted and protected. The great companies have a great culture, and you see companies with a great culture survive and thrive even during tough times. The key to creating a strong culture is mapping out your vision of what you want your culture to look and feel like.

We all want to belong to something and have an identity. After all, we are a tribal species that likes to identify with like-minded people. For example, At Rodeo Dental, we're

**When we're onboarding a new team member, we not only train them but also tell them the origin story of Rodeo Dental & Orthodontics. Why are they here? Why are we here? We also want to get to know them.**

called "Roadies," to show what team we are playing on and align us on the mission at hand, and that mission is to give every patient the key to access high end dental care.

Groups of people or tribes unite behind a common "enemy". In dentistry, it's caries or gum disease.

### **Have you ever measured the ROI on a strong culture?**

The return on a happy culture is exponential. What does this mean for high achievers who aren't good

for your culture? It's an unpopular opinion, but you need to let them go. They are a short-term boost but will destroy your culture overall. For example, if someone is constantly late when you have a culture of being on time and you let it slide, it creates favoritism and friction within your team. Those that show up on time will grow resentful and will create distrust between you and your team.

Culture and happiness don't show up on a balance sheet, but you feel it down the line in results. NFL quarterback Tom Brady was a notable case leading the Tampa Bay Buccaneers to a Super Bowl championship in his first year on the team. He came from a culture of winning and excellence with the New England Patriots, and quickly implemented it on his new team, taking player misfits and turning them around.

Having a winning mindset within an organization makes everyone on the team better.

### **Mission, values and culture**

Our mission is to give families the key to high-end dental care. We begin every meeting with our stated mission and use our external uniting force to rally around. For example, if your team is fighting a battle on childhood caries, and you know that kids miss more school days due to caries than asthma, let





your team know that. That's your external enemy, and a strong rallying cry the entire team can get behind. The team now has a higher purpose, one that is bigger than their daily duties, and it gives their work meaning and value that goes beyond the daily grind.

When we're onboarding a new team member, we not only train them but also tell them the origin story of Rodeo Dental & Orthodontics. Why are they here? Why are we here? We also want to get to know them. What is their vision? How does their role play a part in defeating the common "enemy" and accomplishing the mission? Each new Roadie goes through a cultural onboarding that shares our core values so that we can show transparency on what it means to be here.

### **Investing in your leadership and team**

Investing in your leadership can take different forms. For our doctors, we do a one-on-one clinical mentorship program that helps them develop clinical skills. We've found that it's an important part of building our culture. We also have philanthropic causes that help the underserved, whether it's pro bono dental

care partnering with Dentists Who Care, or sponsoring schoolchildren to go to the LEAP Foundation. Working with an organization that supports a great cause unites people.

We also learn and grow together through continuing education. This helps to build careers and skillsets, and creates events for people to get to know each other and have fun. If you're just starting out and funding these events is an issue, ask your vendors about it; they're usually happy to help. Our doctor career path builds on these skillsets and lets providers know tomorrow is better than today. Show your people how they can grow.

I'm reminded of the story of a janitor at NASA in the 1960s named John. He was known to stay late mopping floors. When one of the engineers asked him what he was doing there at night, he responded, "I am helping put a man on the moon." He knew what the mission was, how his role played a part in the fulfillment of the mission, what tribe he belonged to, and he was appreciated for his hard work.

Appreciate your team and they'll accomplish the mission. ■

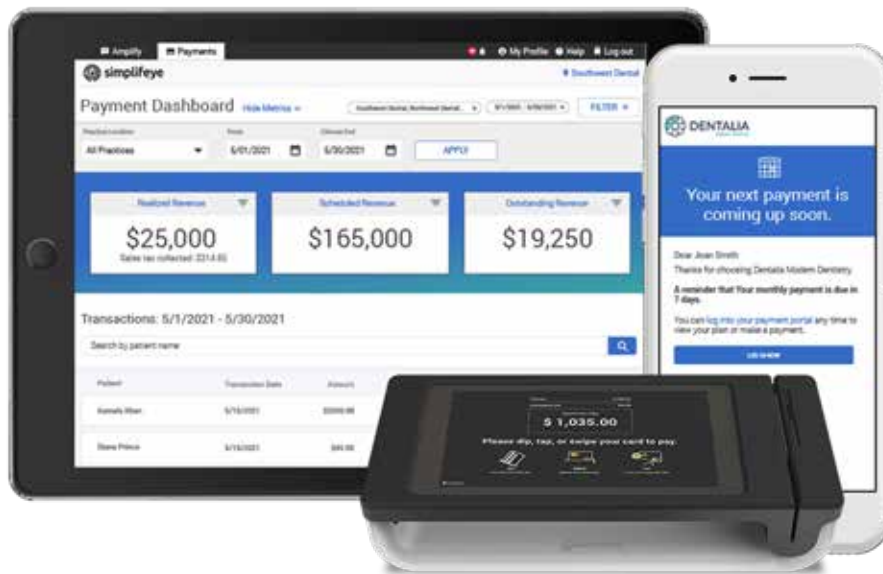


**Dr. Yahya Mansour**  
**DDS, MS, DICOI, FAGD**

Dr. Yahya Mansour received two bachelor's degrees, one in Neuroscience, the other in Biology, then went on to receive his master's degree in Biochemistry and Molecular Biology – all from the University of California. He then went on to receive his DDS from University of the Pacific in San Francisco, California. He continues to advance his knowledge in implant and cosmetic dentistry by attending Continuing Education courses on a monthly basis. In his spare time, Dr. Mansour enjoys soccer, basketball, swimming and scuba diving.

# The Great Resignation & the Great Adaptation

How to use technology to help your remaining team save time, reduce stress, and increase profits. By Ryan Hungate, DDS, MS, Founder of Simplifeye



**Are you exhausted running your dental group practice?** You're not alone. For the past two years, you've juggled one challenge after another, and along comes Omicron.

Dental group practices have staffing shortages from illness and exposure, on top of the shortages already caused by resignations and retirements.

It's hard to find quality hires, and practices are having to pay more in salaries and benefits than ever before. Plus, practices are paying more for supplies.

Fortunately, technology and automation can reduce overhead, improve working conditions, and increase revenue for your practice or group.

## The Next Normal

COVID-19 transformed our daily lives. It fast-forwarded technology adoption and created a self-service, instant-results culture. People discovered the convenience of being able to shop online anytime, rather than when stores are open. They discovered they like being able to



make appointments and reservations online, rather than having to wait to call when the doctor's office, restaurant, or hair salon opens.

According to a McKinsey Global Survey of executives, the pandemic caused companies to accelerate the digitization of their customer interactions and internal operations by several years. The executives surveyed said 80% of their customer interactions now start online.

## Adapting to Changing Patient Expectations

### Online Scheduling

Online scheduling is no longer a nice-to-have. It's a critical part of the patient experience. The key to successfully implementing a self-scheduling platform in your practice is to choose one that gives your practice the ability to customize which procedures, providers, and appointment times you want to offer. You should choose a partner that is easy to set up, fully integrates with your practice management system in real-time, and allows your team to still schedule appointments manually, too.

### 24/7 Customer Service

Your potential patients are online during lunchtime, nights, and weekends. Do you have employees available to answer questions over the phone 24/7?



## The average dental practice has over \$1.2 million of unscheduled treatment in their records. Tools that use AI-based algorithms make it easy to identify patients with incomplete treatment plans and text them a link to schedule online.

One way to adapt is to add a live chat service to your website. Select a company that responds to your website visitors within seconds, collects all the relevant information, and converts those chats into appointments.

For instance, New England Dental Group moved from having their internal scheduling team handle live chats to hiring a professional live chat service and generated an additional \$46,000 in revenue in just two months.

“The conversion rate online has been tenfold,” said GT Thiagarajah, the Director of Operations. “I wish I had found this earlier. It’s a no-brainer.”

Adding technology such as live chat and online scheduling saves your team hours on the phone and saves your patients from the aggravation of being put on hold or sent to voicemail.

### Work Smarter, Not Harder

Technology automates other tasks that are currently hard, annoying, or time-consuming. The average dental practice has over \$1.2 million of unscheduled treatment in their records. Tools that use AI-based algorithms make it easy to identify patients with incomplete treatment plans and text them a link to schedule online. Choose a service that lets you identify unscheduled patients based on procedure, last treatment date, remaining insurance coverage, and more options. Implementing a tool like this would generate hundreds of thousands of dollars for every practice without changing any processes internally and without requiring additional effort from the front desk team.

Is your front desk overwhelmed? Between checking patients in and out, verifying insurance, and answering phones, your team is juggling a lot, which increases the likelihood of mistakes. One easy way to free up more time at the front desk is to use wireless credit card readers that let your team collect payment from anywhere in the practice. Additionally, you can send patients automated text-to-pay reminders that get paid up to 80% faster than paper invoices.

James Clear, the author of “Atomic Habits”, says the best way to create a good habit is to automate it so you never have to think about it again. Fortunately, dentists and DSO executives have the tools available to automate many of the tasks that used to take their team hours to accomplish. From the great resignation to the great adaptation, successful companies are using the tools available to them to save time, reduce stress and increase revenue. ■



### Ryan Hungate, DDS,

is a practicing orthodontist and the founder and CEO of Simplifeye, a company focused on streamlining processes to increase patients and revenue while decreasing overhead. Dr. Hungate is one of the country's leading experts on the intersection of dentistry and technology. He shares easy-to-implement advice for dentists who want to modernize their practices and reduce overhead by adding automation and workflows to help their businesses run more efficiently.

Dr. Hungate graduated from the orthodontic specialty program at USC and continues to volunteer his skills each month to help children. Prior to dental school, Dr. Hungate worked at Apple's headquarters and helped design the customer workflow adopted by Apple's retail stores globally.



# How to Create and Present Compelling and Competitive Job Offers

By Jackie Brown



**Hiring a new team member isn't a single action, it's a process. And** that process can be stressful – after all, you're trying to create an offer that attracts potential candidates, negotiating a fair and clear contract, keeping track of all the state's legal rules and requirements in order to protect the company, all while trying to find someone who is both clinically qualified and a good culture fit for the organization in order to provide the best care to your patients. On top of that, there's also usually the urgency to get roles filled as soon as possible so you aren't losing out on revenue.

We're here to help with some ways that can make that process more streamlined, efficient, and better for everyone involved.

## The process

Regardless of whether you're hiring a new associate, a hygienist, an office worker, or anyone else, making

compelling, competitive job offers starts with having a clear idea of exactly what you're looking for in a candidate. And unless you want to do this all over again in the near future, it's more important and more worthwhile to take your time and find the right person, rather than trying to get the position filled as quickly as possible.

In a way, we're all in sales. What we're selling is our office, the opportunities available with the job, the perks that come with it, a career path, and so on. Focusing on those things will help the job offer not feel like a transaction.

## Levers to pull when hiring an associate

Once you've found a good candidate and gotten them on the hook, now you need to reel them in. A contract is often the “make or break” point when it comes to onboarding, which is why we recommend putting the contract on the table early on in any discussions. After all, why go through all that work only to get to the end and have someone turn down the job because you couldn't agree on terms?

It might seem counterintuitive, but it actually makes it easier to close the deal later on because you've already reviewed and answered all of the questions about the details of the potential job offer. Once you've gotten them comfortable with the contract details, you can now spend the majority of the process focused on what they will actually be doing, which is far more important.

When you aren't counting on a salary negotiation to seal the deal, it might

seem like there isn't anything else that you can use. If you're using the offer to convince them, you're missing the mark. You should have already had them at this point. Remember, this isn't a transaction. There are other "levers" you can pull and put in the contract to sweeten the deal. Keep your non-negotiables like base compensation and production pay in tact, but use other levers to help close the deal. Being transparent about the job's non-negotiable compensation from the outset means that everyone's expectations are clear throughout the process. Throughout the whole process, make sure that you're paying attention to the things in their lives

that are most important to them and use those as your levers. Anything that taps into their emotions is going to help you when you're giving that job offer. Here are some general ones that work well as levers you can pull and include in the final contract:

- Flexible schedules
- A one-time sign-on bonus
- Support or help in paying off any student loans
- Help with daycare or childcare services
- Tickets to a sports event, theatrical production, or a concert
- Additional PTO hours, even if it's only for dates in the first year

When you have conversations around compensation, whether it's with current employees who you're moving to standardized contracts or newcomers, always make those conversations about the whole strategy of compensation – the big picture. Dive into what it really means for the whole package including any bonuses, payments towards CE credits, benefits your pay for, etc. With that said, another thing we strongly recommend is standardizing your contracts across the organization. When you have a standard contract, you are able to use those specific details in your recruiting strategies, it decreases



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## When it comes to communicating the offer in writing, avoid language like, “We couldn’t find a better candidate than you,” or “You’re the best we could find,” or “You’re so amazing.”

the noise that can come from doctors and potential candidates wanting to negotiate changes, and it allows you better visibility when you have a clinician wanting to leave your practice. You already know what the major details are because they are the same for everyone. This will help keep the entire process smoother and reduce any possible friction down the road.

### What goes into the offer

The offer letter is basically a promise of employment. Once the candidate has signed it, it’s an agreement. So be sure to include all details and any contingencies so your company is covered if the employee doesn’t follow through. There are some basic things you want to have in your general job offer:

- › For clinicians, include the contract which outlines their compensation structure as well as any adjustments they should expect that will be taken out of their production or pay
- › Salary (Clearly define what the compensation will be)
- › Position and job title
- › The effective date of the offer letter
- › Any contingencies for background checks or performance requirements
- › Disclaimer of “At-Will” employment, if applicable in your state; this should be included in any contracts offered
- › Location, address, supervisor
- › Anything you’ve discussed during the interview, or offered to them over the phone

- › Clearly articulate all the details about payment mechanics including pay dates
- › A place for them to sign the offer letter

Legal matters may not be a fun topic to talk about, but it’s one of those things that really could affect your brand. For any offer letters templates you will be using, make sure your legal counsel reviews them to ensure they are legally sound and you are covered. The last thing anyone wants is to have any kind of litigation, especially with something as simple as a job offer.

To that end, make sure that the only things written down in an offer are facts, not feelings. When it comes to communicating the offer in writing, avoid language like, “We couldn’t find a better candidate than you,” or “You’re the best we could find,” or “You’re so amazing.” Avoiding words and phrases such as these will keep you from having to defend them later during any potential litigations arising from a termination of employment.

By all means, welcome them to the team. And of course you can tell your new team member that they’re amazing. You can tell them how excited you are for them to join your team, but you don’t want that written down in a contract where that kind of language can become binding.

Throughout this process, it’s important to remember that a job offer isn’t a transaction, it’s an experience. That might sound radical, and it’s certainly not the norm, but think of it this way – you aren’t hiring an employee, you’re offering another person an opportunity to change their life. ■



**Jackie Brown**

is Executive Director of Human Resources for Community Dental Partners. Having earned a Bachelor’s Degree in business administration and management from West Texas A&M University, Jackie went on to study for an MBA at Texas Woman’s University. She joined the CDP team in 2019 as the director of dentist recruiting. Today, as executive director of HR, Jackie is dedicated to providing leadership and clarity, building relationships, and removing road-blocks for supported doctors and staff as she helps them connect to a bigger purpose. For her, it’s about more than just the work — it’s about the people.

# Dental Express bolsters its workforce through empowerment in tech

Using the right technology can help with training in group practices, allowing them to focus on good employees

## Talented people are out there.

Some are in your practices and others are looking to work for you. The challenge for DSOs is creating an environment where they can thrive and grow.

Teresa Williams, Chief Operating Officer of Dental Express in San Diego, Calif., said technology can play a key role in attracting, retaining, and empowering DSO workforces. “It’s a talent war, but talented people are out there,” she said during the DSO Leadership Summit in 2021. “And technology helps us discover that talent in them and helps them see that in themselves.”

Williams discussed how to empower employees through technology. “Reading through job descriptions in the past for dental office receptionists, I’d see something at the bottom about being a team player. It was always listed after requirements like knowing how to file a PPO insurance claim, having experience with certain dental software, and knowing how to work with HMOs and Medicare.”

Being a team player within a strong cultural setting seemed like

an added benefit. “We were looking for them to empower us to be successful and then talking about culture,” Williams said. She argued that it’s DSOs’ job to empower their employees to be successful, not the other way around.

“Some of the cloud-based dental software and analytics platforms that are out there now allow us to make expert operators out of people that we hire from Starbucks or people who were thinking about working at Target,” Williams said.

Dental Express trusts Dentrix Ascend® to empower its team. The cloud-based practice management software by Henry Schein One grants DSOs and group practices the ability to integrate workflows within and across locations, no matter how many there are. Its easy-to-use interface allows easy staff training, moving even novice employees quickly from new user to expert and reaching full productivity almost immediately.

“Most successful DSOs have a formula that works,” Williams said. “They may have analytics plugged into the back of their server software

or maybe things that have been custom written. They’re invested in these things and it’s scary to think about doing something different. But my challenge at Dental Express was not letting my experience of what had worked in the past get in the way of what could work better now and in the future.”

Dentrix Ascend provides a unique workflow that guides DSOs and their teams to greater efficiency using popular devices from any location. When you’re not physically in the practice every day anymore, you must lead through influencing other people and verifying what’s happening in the practice. That’s hard if you cannot access the data. Dentrix Ascend eliminates these silos, helping you build a stronger culture and empowering your people across your locations.

“Don’t just lean on what made you successful,” Williams said. “But pivot and be more responsive to what you need now. That’s something we learned. The types of challenges DSOs face today are much different than they were before.” ■

To learn more about why the Dental Express team trusts Dentrix Ascend with its growth goals, visit [DentrixAscend.com/DentalGroupPractice](https://DentrixAscend.com/DentalGroupPractice).



# How to Prepare for Successful Hiring

Best practices for hiring, recruiting, and retaining associates/staff in a chaotic marketplace. : BY GRAHAM GARRISON

**When it comes to the current talent pool of good, quality dental staff candidates, Dr. Eric Roman said dental group practices need to accept the industry's reality. "Let's be honest about it. We have all the makings of a nightmare."**

Dental staff have always had the challenge of working hard to make sure that patients don't walk out the door angry. "We have one of the hardest customer service jobs around because of how our patients, given a choice, would rather not be in our offices," said Dr. Roman. "We tend to hurt them...even when we try not to. It's not fun to hold your mouth wide open for hours, and it tastes like crap. Everything we do is expensive. If that's what our product experience is like, is there any wonder why this is a hard business for customer service?"

The pandemic's challenges only added to the pain points. First was the dental industry being told they were not essential. Then, due to a combination of risk, demand and legislation, the pay scale skyrocketed overnight. All of a sudden, fast-food restaurants like McDonald's were paying more than what dental group practices were accustomed to paying for a skilled dental assistant.

All those factors have added up to a drained talent pool for the dental industry. Statistically, dentists came back, and many assistants and front office staff came back. "But do you know who didn't come back? Our hygienists."

Hygienists are the most critically trained role outside of the dentist. It takes years to build a hygienist – and for a number of reasons they chose to leave the industry during the pandemic. "Every single one of my private coaching clients has had to completely change their perspective on the provision of hygiene care because they're just not available," Dr. Roman said. "And it's going to be years before they are."

Indeed, the market has changed, and it's never going to be the same. However, it's not cause for despair. There are plenty of best practices for dental groups to rethink how they recruit, hire and retain their team. In the following article, Dr. Roman, Head of Group Training and Learning and Development / Partner, DEO; and Josey Sewell, Head of Implementation and Coaching / Partner, DEO, discuss, best practices for recruiting, hiring, and ultimately retaining a highly successful dental team.

### Facing facts

Dr. Roman said step one in the process is unorthodox. "We have to honor the fact that we're actually part of the problem and the reason people left."

Dental group practice leaders need to be open and honest that "we've allowed for the creation of a difficult working environment. When you look inwardly, you have to say, 'I'm part of the problem.'"

Fundamentally, the dental experience is pretty much the same as it's been for 100 years. What dentists do, how they do it and how they treat customers hasn't changed a whole lot in over a hundred years. "And so... that's on us," Dr. Roman said.

And by customers, Dr. Roman doesn't just mean patients. Dental team members qualify. Roman said the industry got lazy with its systems, and never adapted to creating healthy work environments like other industries were forced to in order to maintain people. "Now we're paying the price for not having to adapt over this past century of hiring and management."

Regarding hiring practices, leaders must own the fact that employees now aren't growing on trees. Not only that, but team members coming in are from a different generations. "Generational dynamics are not a game," Dr. Roman said. "Every generation has distinct new behaviors from the ones before them, as well as from the ones that follow." For instance, Millennial and post-Millennial team members want a healthy work environment and a place where they're proud and excited to get up every day to go to work because of what they're doing.

"And that's not what we've created," Dr. Roman said. What the new generation of prospective replacements are asking for, the industry currently doesn't have much in the way to offer. "We are not healthy work environments for the most part. And that's the reason that these hiring and management practices have to change."

Roman said when he first started practicing, he would just put out an ad in the newspaper and get 300 perspective applications. His organization had to create systems to filter all the applications. "But now I hear about people in the same markets putting out ads in 20 places and not getting any applications."

Everybody is hiring, not just dentistry. Dental group practices are competing against Amazon, McDonald's and big corporations that have massive budgets, worker bonuses, and benefits. With such stiff, entrenched, and refined competition, dental group practices must look inwardly to create better systems and practices for hiring and retention.



## Write out – and live out – your core values

In today's marketplace, leaders must look inwardly and ask themselves, is their priority just to pad their own pockets and make as much money as possible, or are they really being truthful to a vision of how they

Josey Sewell said one of the things we learned from the last two years and the "Great Resignation" is that people are tired of working for companies and bosses that don't care about them and don't serve a greater purpose. "Having a good job is more important to Millennials than having a family or

the vision and values, Sewell said. Vision and values aren't just a great way to recruit top talent (because they can tell within minutes if you really are true to your vision and values, so you can't lie about it), they become the North Star for the company. When everything falls apart and the stress and burden become too much – a compelling vision and values will help us get out of bed and face the day to solve the problems.

There are steps to make sure you're hiring around your core values. For companies who have the right core values, Sewell has them list out each one and then write down one or two questions for each value. She recommends using behavioral-based and open-ended questions.

For instance, the wrong way to do this would be to ask: "Are you growth-oriented?"

The right way to do it would be: "Tell me about a time when you faced difficulty at work and how you overcame the difficulty?" Or "When you don't know something you need to know, how do you acquire the knowledge you need?"

You have to listen to how the individual responds and see if you can assess how well they might or might not be growth-oriented. This is much more nuanced than just listening for the "right answer," Sewell said. You must take everything into context, how they describe their previous work experience, how they ask questions, body language, etc. "It takes practice but is a skill that can be learned."

Sewell has team members create a rating system to help objectify as much as possible. If you have five core values, but based on the interview, the



impact the lives of patients and team members? In other words, does the vision for the company motivate their team to get out of bed and come to work in the morning?

"That's a really big deal, because the truth is, 90% of us have the exact same vision, 'We're here to provide great care,'" Dr. Roman said. "That's not really motivating. People are looking for something they can get behind. Quality of care should be an expectation and not something that sets you apart. Plus, no matter what you think, most of your patients and team members can't tell the difference between A-quality and C-quality treatment."

owning a home, this is the first time in history we've seen this shift."

Gen X and Baby Boomers placed having a home and a family more important than having a good job. However, people in the workforce today will work harder for a purpose than they will for money, Sewell said. "They want to feel like they belong, they seek opportunities where they can grow, they want their work to mean something, and they want to make a positive impact on the world around them."

Daniel Pink in his book, "Drive" said, "[P]eople want three things: purpose, autonomy, and mastery". We can give people purpose through

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candidate only answered two of the questions in a way that aligns with your values, they typically are not a fit. “Keep in mind we often have to do our very best in an interview to assess for core values, but it may take the onboarding period or up to 90 days to really know if someone is truly a core value fit,” Sewell said. “Just like we do our best to systemize our workflow for clinical work, we can systemize our recruiting and hiring process. Every step in the process can be designed to help ascertain if candidates fit your values.”



### **Close the back door**

If employees have been leaving the team, group practices have to acknowledge that and have open and honest conversations with the team on the reasons they may have left, so they can in effect “close the back door” from future attrition.

Dr. Roman has challenged the leaders he consults with to be open and vulnerable with their teams concerning turnover and ask, “I know that we’ve had great team members leave. It stings. What can we

do here to make this environment what we need it to be? Can you (the team members) be partners with me and lean into it? And before you give me a notice tell me, ‘I need this to change in the environment for it to be a place I can be excited about.’”

### **Be willing to hire employees back**

In some cases, employees who leave for a higher salary may soon discover that they’ve transitioned to an unhealthy work environment. Dr. Roman asks leaders if they have

the courage to keep the door open for those former team members who may have second thoughts about leaving.

“Human nature says that even though they’re not happy at the next job, they won’t come back to you, even though they want to, due to embarrassment,” he said. “So, I’m challenging all my employers that when they’re experiencing loss, they need to be strong and grounded on the exit.”

He recommends leaders tell their departing employee, “It breaks

my heart I have to lose you, but I understand you need to try this change. Before you go, can you tell me what things we would have needed to do to have kept you? And, I want you to know that I’m welcoming you back here with open arms at any given point if what you are leaving for doesn’t meet your needs.”

Dr. Roman said he recommends leaders create a schedule of when they reach out via text message or email, just to check in. This is most effective when done several times over the course of the first weeks and months post-departure. He recommends asking questions like “How’s the new job working?”, or “What have you learned there that we should incorporate?” “You would be amazed at how effective this strategy is at creating safety for team members to return.”

### **Offer training to current team members**

Dental practices used to think they had to catch fish (i.e., new team members), but that’s not the only option, Dr. Roman said, who uses the concept of a fish farm where schools of fish are developed. “We can grow and cultivate our own fish.”

What that means is creating pathways to give people the skills they want and need.

Indeed, more companies are investing in training internally and giving team members pathways to enhance their skillset. The most successful group practices are doubling down on how they develop people, Dr. Roman said. “The truth is, I’ve always had better experience finding the right people first and giving them the skills second.”

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## Prepare for successful hiring

In the fall of 2020, the Washington Post reported that there were 10 million job openings in the United States, and just 8.4 million unemployed. Thus in order to attract job candidates, dental group practices have to wade into the struggle for the most precious resource businesses are all fighting for – attention.

“We are bombarded every minute of every day with an incredible amount of content,” Sewell said. People are looking to find a place where they belong. A job ad might be the first interaction someone has with your business. “You want it to be something that catches that precious attention and holds them long enough that they click to find out more, or even better, feel compelled to apply. “We have seconds to try to attract people – that takes effort and intention and a well-written ad.”

## **Sewell advises DSOs take time to build an ideal candidate and team member avatar, then make a list of what that ideal person would want to see, what would attract them and make them take action in applying.**

Dental group practices posting job ads need to know there is a difference between the ads themselves and the actual job description. Job ads are to attract candidates, Sewell said. “Nobody is attracted to a job description. In the past we’ve had the luxury of posting a terrible job ad and still had a lot of responses.

Now, the market has shifted, and the job ad should be looked at like a piece of marketing material. It needs to capture and hold attention. It needs to be ALL ABOUT THE CANDIDATE and not the dental group practice.”

Sewell advises DSOs take time to build an ideal candidate and team member avatar, then make a list of what that ideal person would want to see, what would attract them and make them take action in applying. “This is marketing!” she said. “It should have great copywriting. It should spark interest, and excitement and a desire to find out more about your company. It should be all about culture, team, and vision.”

If your job description was written five or 10 years ago, Sewell said to get rid of it. If you’ve ever had the situation where someone says, “Well, that isn’t in my job description” you might need to see if that

person is really a fit for your values, and you need to rewrite your job descriptions. This should not be an exhaustive list of tasks. This should be about outcomes, clear expectations, and the contribution and impact someone makes to the team.

A few must haves for Sewell include a brief description of why

this position and the roles and responsibilities are mission critical to the vision of the organization, the one to three key performance indicators this person should be driving on a daily or weekly basis and “this job is for you if...” and “this job is not for you if...” where key behaviors and expectations are described.

## Getting it right

Dr. Roman said the industry doesn’t have a hiring issue. “The truth is we have a management issue,” he said. “The people left because of poor management – we weren’t delivering what they wanted.” Before dental group practices start hiring, he reiterates that they must get their management systems corrected. “Because if we bring in great people, but we don’t have the right systems to support them, they’re going right back out the back door.”

Leaders connecting with their people helps stop employees from leaving in the first place and elevates their performance and willingness to stay. “When our existing people are excited about where they work...because of the great management practices...they, in turn, help us find and select our next employees,” Dr. Roman said. “My single greatest acquisition tool was raving fan team members. When our team members loved where they worked, they recruited on our behalf.”

So whether it’s management, values, job ads, hiring practices or team morale, when dental group practices get their mindset and tactics in order, “when we finally put the horse before the cart,” Roman said, “great things happen.” ■

# How to Hire Dental Associates and Improve Retention

Four principles to make your search for dental associates easier and more effective. : BY DR. CHARLES MOSER



**Building a productive, efficient dental practice requires time, money** – and most importantly – a great team of people that you can trust. Knowing how to recruit, hire and retain top dental associates is one of the most critical challenges of operating a dental practice.

I have worked in the dental industry for over 30 years, ranging from cosmetics to implants and eventually to a Dental Director of a large group practice in Houston. I had 16 locations, and I hired, fired and managed up to 50 associates at any given time, with about 250 staff members. I have a deep understanding of what dental groups and practices are facing when searching for a dental associate. With these four principles, your search for dental associates can be much easier and more effective.

## 1 Hire for success

The interview process is a critical piece of hiring successful candidates. If done right, the interview will illuminate what you need to know about the candidate. Without the right steps in place to identify the information that you need, the interview process can be needlessly difficult.

This is where the core values of your practice and the applicant

come into place. If you're not at least introducing your core values into your hiring process, it will be harder to avoid any problems that might come with your new associates. I encourage you to sit down and define three to seven main core values and bring them up during the interview process to ensure that there is some form alignment between your company and potential new hires. If there is no alignment whatsoever, the relationship will likely not work out.

When you're interviewing, you want to find out where the applicant needs training and whether you can provide that training or not. We can take people and train them in dentistry, but you can't train morals and ethics. If you're interviewing someone who says their number one priority is making money, you might want to ask some follow-up questions to ensure that their morals and ethics align with yours.

Finally, you need to be crystal clear about the expectations of what you're wanting from the person you're about to hire. These need to be very detailed and specific about what you want this person to do, and even how much you want them to do.

## **2 Retain through associate psychology**

In order to retain your top talent, you will need to learn how to do a lot of different things at once. Creativity is key to employee retention and there are many different approaches to improving retention. You may find that offering a sort of menu of different things that address the needs of your associates at different

stages of their life is a powerful tool for retention.

For instance, there are a lot of younger associates working in the industry right now. Many of them may be in the stage where they are having kids, which means that they will need childcare. Larger organizations could have the unique opportunity of providing childcare by building a childcare facility that is central to every location. Younger families would see that as a value-added service that gives them the peace of mind that their children are being cared for, without any fines for a late pickup.

**When you're interviewing, you want to find out where the applicant needs training and whether you can provide that training or not. We can take people and train them in dentistry, but you can't train morals and ethics.**

Continuing education is another huge incentive for associates that are looking to develop their professional skills and grow in their roles. The best approach for continuing education is to look at it as an investment in your people, so it should be a program that provides value and challenges your team to grow. Additionally, you could look in to bringing continuing education in-house. Companies like Dentsply, Burkhardt Dental Supply, Henry Schein Dental and Benco Dental will come to your office and do continuing education for your associates and dental assistants as well.

Compensation for dentists can be tricky. A lot of associates are looking for dental groups that pay a flat salary, and you might even be able to give them a smaller percentage of product and collections if they knew that their check was going to be the same. There's a system that you can create that puts them back on a percentage of collections if they fall below a certain point, ensuring that they aren't spending all their time in the doctor's lounge.

## **3 Provide ongoing clinical support**

Another way to invest in the success of your employees is to provide

ongoing clinical support. Leverage critical training systems to set your associates up for success, whether it's in a group setting or one-on-one. Give them assignments and challenges to complete. Bring them in on cases to get more experience and make them do treatment plans. Anything that gives your associates an opportunity to get into the details would only benefit their professional growth and the success of your organization.

At South Texas Dental, we held quarterly meetings with a dozen doctors that I hand selected for a sort of "doctor's round table." We met at nice restaurants and had a





two-hour presentation, where each doctor presented for six to seven minutes in front of the group. Everyone hated it, but it provides a tremendous amount of value to your associates. If they can get up and present in front of their peers, it elevates their language and elevates their ability to talk to patients.

If we train ourselves to think that we are in the sales industry, it helps us to better “sell” treatments and care that our patients need. But you need to be able to communicate with people. Mentoring and investing in your team is the key to developing their skills in the workplace.

#### 4 Improve performance

A key part of the ongoing clinical support is reviewing the work of your associates to ensure that they are meeting the standards set by your organization and the industry itself. Consistent compliance checks are a huge piece of improving the performance of your team. Even if your compliance department is relatively new and small, it’s important to establish a cadence of checks

on all the procedures, X-rays, and treatments to meet the specific criteria for each of your processes.

It’s important to establish expectations in the hiring process to help your applicants better understand the outcomes they should be achieving each week. When you create these tangible expectations and have them written down, you can go back and easily evaluate the doctor on their performance. A job description isn’t bad to have, but it’s hard to check the outcomes against a vague description that doesn’t tell anyone what exactly is expected. Use these expectations as a checklist to refer to during reviews and mentoring sessions.

If someone fails to meet your expectations, approach this discussion as a coaching opportunity instead of a disciplinary measure. Address any issues that they might be facing and see how you can help them get them back to where they need to be. You probably won’t be able to help every one of your associates, but people are much more receptive to criticism when it comes from a place of respect. ■



#### Charles Moser, DDS

Dr. Moser graduated from The University of Texas Health Science Center, San Antonio, Dental School and completed a General Practice Residency at St. Francis Hospital in Hartford, Connecticut. In 1994 Dr. Moser purchased his first private practice in downtown Houston with the simple mission “The patient is the most important person in the practice. Comprehensive quality care with respect and integrity.” In 2009, Dr. Moser was asked to join South Texas Dental as the Dental Director for the Houston and San Antonio regions. South Texas Dental, with over 40 offices, is one of the largest Medicaid providers in the state of Texas. As Dental Director Dr. Moser oversaw 40+ dentists and over 200 staff. Dr. Moser is a Certified Speaker Trainer and Coach for the John Maxwell team and an approved speaker for Dentsply.



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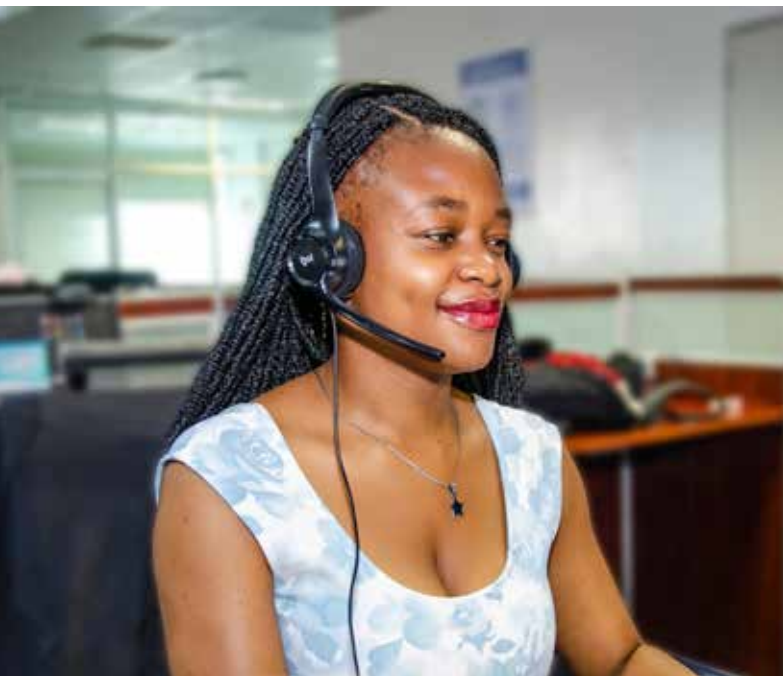
# Elevate Your Culture with the Right Team

By J.W. Oliver Jr.

## **Change and growth will be the focus for successful**

DSOs looking to make an impact in their community, industry, and on the bottom line, in 2022. A critical element to their success is hiring the right people for the job while cultivating a culture that's in line with the organization's mission and core values.

Kaizen, a Japanese term meaning "change for the better" or "continuous improvement," can help a rapidly growing company with this element. It is a Japanese business philosophy regarding the processes that continuously improve operations and involve all employees. Kaizen sees improvement in productivity as a gradual and methodical process. The concept of kaizen encompasses a wide range of ideas. It involves making the work environment more efficient and effective by creating a team atmosphere, improving everyday procedures, ensuring employee engagement, and making a job more fulfilling, less tiring, and safer.



The DSO industry is experiencing almost immeasurable growth. Continuous improvement in processes, hiring the right person for the job, and managing an office environment is no job for Barney Fife, Mayberry mentality. It requires a strategic and well-defined plan.

## **Mission and Core Values**

If you do not have a well-defined mission statement and core values, make that a priority. Centering every decision around these – asking if the decision gets you closer to or further away from the mission – can make decision making painless and move your organization along the right path like a compass set on "True North!"

At SupportDDS, ours is "A commitment to excellence while making a Global Impact for the Kingdom." With our core values: Faithfulness/Generosity/Resilience/Inspirational/Excellence.

If you do not have a well-defined mission statement and set of core values, make this a priority. Use your team to assist in developing these, and then as the leader, finalize and implement.

## **Not Me but We**

Hire for the TEAM! CEOs, owners, and executive leadership will often look at areas that they feel or anticipate they will need help in while failing to incorporate or bring the team into the decision-making process. Learning where potential weaknesses are at currently, or where lack of manpower in certain areas exists, can assist in developing the team approach and set you on a course for success to build a culture of inclusiveness.

## **Ask Who not Why**

Common mistakes that remain a detriment to culture and team include directing inefficiencies towards a particular position or person. Often we assume the position they originally were hired for can be done with the same manpower with disregard to the load. We must



consistently meet with and evaluate the work required of each team member. Culture is being respectful of team members' time and their role in the success of the organization. KAIZEN!

Take the office manager's role. When there were minimal new patients each month, it was expected they could handle the load surrounding insurance verifications, new patient forms, follow-up to treatments plans, A/R, etc. As the practice and/or a number of practices grew, the necessity for skilled and trained teams to handle each of these independently became imperative. Building teams in RCM, Re-care, Insurance claims/verifications, and other critical roles can be counter-productive to your core team in building a culture that embodies your mission and core values.

Ask questions, find out where the "boots on the ground" see a bottleneck and have a need for assistance. This will enable you to "elevate" those team members to new heights, thus allowing them to flourish in the role where they excel. Have enough resources to handle important tasks during lunch hours, team huddles and even after-hours phone calls. Utilize remote teams to support your team to enable growth. Think outside the box. Empower your team.



Do your team members have a clear definition of their roles and enough support to complete the tasks? Culture is having enough resources to the workload while exceeding the patient experience.

### **More Time/More Profits/More Impact**

2022 presents an opportunity like no other. With the right attitude, the right plan and the right team members, you can expect exciting changes and exponential growth. As you expand those horizons, bringing on teams that fit your culture will be your most difficult challenge. Consider utilization of remote/virtual teams to aid you in meeting your goals and developing the culture.

SupportDDS is an excellent resource for full time, dedicated team members with university education levels that can far exceed your expectations.

"Your Systems, Your Way." Our objective is not to show you a new way, but to implement our teams seamlessly into your organization, absorb them into your culture, and create an environment for KAIZEN to be embraced and allow for success! The key is the right people to fit the position.

This focus allows you to have more productive time for yourself and your team, increase efficiency and profitability while making an impact on healthcare and the persons of the community. KAIZEN! ■



**TOP 10  
SUCCESS TIPS**

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



# How to Manage Remote Team Members Effectively

By Pete Mercer



**In the beginning months of 2020, employees and employers everywhere** were introduced to remote work, something that was likely a novel concept for many. Remote work became a consistent part of life for a lot of people: a hot topic discussed ad nauseam by thought leaders and influencers on LinkedIn, a burning question of efficacy for business leaders, and an overall discussion on the work-life balance for American workers as a whole.

Not every industry is equipped with the tools to make remote work feasible; for example, restaurant and retail workers have no choice in the matter. Many employers struggled with the decision of moving to remote operations, and not without good reason for concern. For industries that weren't accustomed to

implementing remote employees, it became a question of how to operate smoothly and efficiently without the controlled variables of an office environment. It's not entirely unfair to say that it's a bit of a gamble – some employees simply aren't made to work outside of the office.

For many dental groups, the possibility of working remotely became a cost-effective solution that allowed them to hire more support staff to make the in-office operations more efficient. It's all about equipping your teams with the tools and software they need to perform their jobs like they would in an office.

While hygienists and doctors aren't able to perform their duties outside of the office, there are plenty of other ways to implement remote workers that can improve your bottom line, support your patient care outcomes, and increase productivity. Ken Kaufman, Chief Financial Officer at Community Dental Partners described his remote team, saying, "At the practice level, we're not doing anything remote. From our perspective, it was kind of the support center functions that really have the most opportunities to go remote. My finance team is remote, and my accounting team is split. It's a challenge sometimes to figure out how to keep everybody aligned, to keep the culture going. We're testing and trying things a bit to figure out a good solution."

## **Adopting new technologies**

A crucial step to managing remote workers is adopting new technologies to bridge the gap between remote workers and in-office workers. These

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tools are meant to encourage collaboration, ensure accountability, and streamline communication between your teams.

Dr. Ron Taylor, Founding Partner and CEO of Trident Endo, says “Everybody always has their focus on the end goal, but they kind of lose sight of the journey in between. We have an office in Pennsylvania, but our main headquarters is in Maryland. The practice manager is in charge of all of the office managers. They have their weekly meetings, establish their KPIs and follow up on their KPIs. We use Microsoft Teams, and I feel like we’ve only scratched the surface of what it can actually do. If anyone has a problem or needs to ask a question, you can just hop on Teams really quick, share your screen, and somebody can help them out.”

Finding technologies to adopt into your practice can be challenging with a saturated market, but it really comes down to finding something that works for you and with you to achieve your goals. It’s easier to pick communication tools because they don’t require a larger investment. However, remote call center employees require an integrated phone system that they can easily access from their home.

Taylor said, “It goes back to having the right people, in the right seat, on the right bus. Sometimes you have people who align and are a great cultural fit, and sometimes you don’t. It starts with just having the right people.”

### **Streamlining communication**

One of the biggest challenges to implementing a remote team is

maintaining consistent communication throughout your organization. Establishing a work-from-home program for your organization creates a barrier of communication between the office and your remote workers. Tools like Slack and Microsoft Teams are designed to improve internal communication for your organization and connect with those that are working from home.

If you can effectively streamline communication for your practice, you will break down the barriers built up by having a remote team. Schedule weekly meetings to discuss objectives, goals, and KPIs, as well as smaller one-on-one meetings to give the remote teams a better opportunity to get to know their team members and engage with your organizational culture. Culture is nothing without a strong communication system, which is why it’s so important.

### **Leveraging new remote roles for your organization**

Timber Dental, a family dental team serving Portland, Oregon, established a new remote role to provide a better customer experience and better patient care. A remote patient care coordinator is meant to help alleviate the pressure off the phones in the front office of the practice. The patient care coordinator provides a direct patient contact service instead of an online chat bot where your patients can feel heard and cared for, while supporting the productivity of your front office.

Kate Casparro, a remote patient care coordinator at Timber Dental, discussed the value of the role

saying, “Timber has a focus on meeting our patients where they are, and a lot of our patients are technologically savvy. They enjoy being able to multitask and make an appointment over the computer while they are working or whatever, helping their kids with school. So, we came up with the remote patient care coordinator. It’s a live person monitoring the chat, someone with dental experience that knows how to answer scheduling questions and insurance questions and other things like that.”

By moving the patient care coordinator to a remote position, you can easily schedule patient appointments, field questions about various treatments and cleaning procedures, and build that relationship before they are even in the office. Casparro says, “Timber has this really amazing support culture system where they want the human aspect to be as obvious and apparent as possible in your chats with the patients. So having that support made it really easy to add a human touch to the chats. We’re able to add emojis and laugh along with the patients. We also respond to any type of time-sensitive material very quickly because we do have access to the front desk staff as well.”

Managing a remote team isn’t impossible. Define the culture of your remote teams early on and give them the tools they need to operate productively and efficiently. Remote work allows your employees to work from the comfort of their homes, ideally giving them more time with their families and a better work-life balance. ■

# The Right Stuff

Using HR to invest in your dental practice

**Knowing when to implement a Human Resources department for your growing dental practice can be challenging, but it is a crucial part of your growth and culture. An HR professional can secure top talent, improve employee retention, and bring balance to a tumultuous work environment. Recently, The DEO discussed the importance of HR and how to hire efficiently with three professionals within the dental industry:**



› **Michael Gregory** is the Regional Manager at The Winning Smile Dental Group based in Brandon, Mississippi. The Winning Smile is a group of family-friendly dental practices that strives to provide a 5-star experience.



› **Esida Destani** is the Human Resource Director at Underbite Dental Management, based in New York, New York. Underbite is a management consulting organization that provides practices of all sizes with centralized tools and resources.

## **The DEO: What are your three primary responsibilities for your organization?**

**Michael Gregory:** My three primary job functions are trying to locate and evaluate talent, improving employee retention, and developing our D players into C players. I also focus on day-to-day accountability and day-to-day operations. What processes are we failing at? What processes are we succeeding at? How can we maximize efficiency in these processes and how do we simplify things more than anything?

**Esida Destani:** My primary overall functions are:

- › Collaboration with the senior leadership to understand the organization's goals and strategy related to staffing, recruiting, and retention.

› I also plan, lead, and develop policies, to support our company's human resource compliance and strategy needs.

› Lastly, I also oversee and administer the compensation, benefits, and execute best practices for hiring and talent management.

## **The DEO: How do you go about finding good talent?**

**Gregory:** I'll be honest and say it's not easy. The first avenue I am looking for is, is there someone I know I can trust that can refer someone to our location? That's the first step for me. Do we know anyone that we can try to bring on board that is going to match our core values? If not, we will try to open it up a bit more.

We have found that trying to hire via Facebook or something like

that, you get a ton of applicants, and maybe 2% of them have the qualifications you're looking for. So you spend a lot of time just searching through the weeds to hopefully find that one person of the 125 that applied that has experience. That's still even better than some of these paid searches like Indeed. You get an even larger pool at that point, so it's an even longer process of finding someone that actually meets what you're looking for.

**Destani:** Our primary source of finding talent is our employee referral program. I'm a big believer in in-house referrals. If you refer your friend or family member, that shows me that you love your job, love the company, and believe in our core values. On a different note, not all referrals are successful. The

expectations are high, so sometimes the team expects you to hire them because it's their friend, sister, and family. Therefore, we provide a fair interview process for referral applicants to avoid any biased decisions from the hiring managers.

We offer \$1,000 per year, up to three years, to the employee who referred the candidate for the program. Both employees do have to be employed by us during that time.

**The DEO: When is it time to hire an HR person?**

**Destani:** I think when you realize that the people that work for you need to grow and develop their skills you realized you need an HR department. As an office manager for many years prior to becoming an HR Director I always felt the need to provide my team with more opportunities in their career, but I didn't have the tools or resources to do that. Developing an HR department after 3-4 locations I believe is necessary. There is a tremendous need for training and developing the managers on how to retain employees and improve the culture in the workplace. We developed our HR department after we had 3 locations.

**The DEO: Are there certain industries that stick out when looking at a candidate's background?**

**Gregory:** If you can look at a person's resume and see that they are coming from a customer service background, then you feel more confident hiring that person. So if you know they worked at Chick-fil-A for two or three years, you know the level of customer service that's



**I think what we look for is someone who just wants to grow. It doesn't matter where they came from.**

been ingrained into them. But if you see they have worked at a place that's notorious for having the worst customer service ever, then you know that's probably not been ingrained with them. I don't have a specific industry as much as it's kind of specific thing I'm looking for.

**Destani:** I would add that retail & service industry are significant. If they've been a sales manager they might be ideal for a treatment coordinator position. We provide dental training and the rest is mostly sales

experience. Furthermore, we have had success finding talent from the service industry such as Starbucks and fast food chains. My first job was at Burger King. I was promoted to manager there and took a few courses. So definitely in fast food, the customer service needs to be top-notch, and you have to work in a fast-paced environment and provide great service. I heard someone say once, "It's not customer service. It's the customer experience and excellence." That's what we're looking for. ■



# Connecting Dentists to Dental Assistants

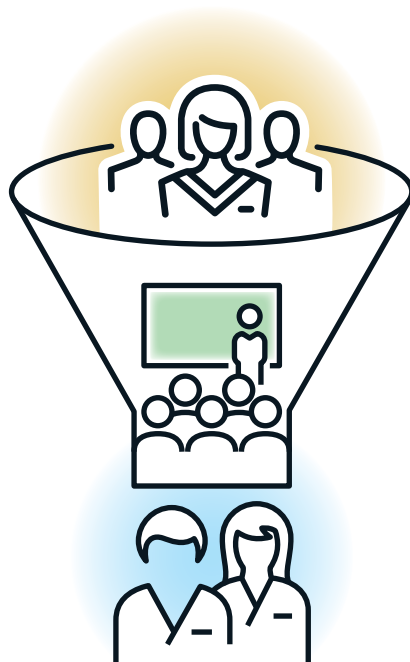
**Finding dental assistants for your practice might be more difficult** than it used to be, but it doesn't have to be impossible. At Accelerated Dental Assisting Academy (ADAA), students participate in a 10-to-12-week dental assisting course that gives them the hands-on learning experience they need to succeed in today's dental market. Despite the challenges with staffing dental assistants, ADAA has crafted a unique and creative approach to recruiting, training, and staffing the next generation of dental assistants.

Mishaux Ramirez, CEO of Accelerated Dental Assisting Academy, said, "Our mission is to give students an opportunity to discover their life's career path through an affordable, convenient, and achievable education. We focus on partnering with top notch dental offices to host our school, so we can provide our students with a great experience during their course. In return, the hosting office benefits by having an in-house hiring funnel."

## The ADAA difference for the students

ADAA courses are intended to provide students with a general knowledge of the dental field. Many students have used ADAA to get their foot in the door of a dental office and start working as a dental assistant. Students gain basic knowledge and skills of dental terminology, X-rays, impressions, and 4-handed dentistry through lectures and clinics.

In addition to the real-world, hands-on experience for students that are new to the field of dentistry, ADAA also offers a Career Services



Program to assist them with the job search process and Life Coaching for their careers. ADAA's Life Coaching teaches students the soft skills they will need to be better employees like punctuality, how to communicate with patients, and the importance of a positive attitude.

"We take pride in being affordable, convenient, and achievable for

students," Ramirez said. "We offer interest-free payment plan options to better help our students afford the program. The classes are held on Saturdays, so our students can sustain a full-time job while attending their classes. The class is structured with lecture and clinical hours, so students can get the hands-on experience they need before entering the workforce."

## The ADAA difference for the dentists

While ADAA offers a unique educational experience for the students, they want to make sure they take care of their hosting doctors. When dentists partner with ADAA, the Academy rents the office to hold the dental assisting school within the practice – this way the hosting practice earns some passive income. After the semester is over, hosting dentists have the first pick of hiring the top graduates.

ADAA's goal is to be an easy solution to the ongoing staffing challenges that most dental practices face. All that is required of the dental partners is the use of their facility during non-operational hours.

Ramirez said, "Our operations are designed for the hosting doctor to earn passive income with very little effort. We cover all costs and manage all operations associated with the school such as licensing, curriculum, marketing, and much more." ■

# Need Dental Assistants?

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## Host A Dental Assisting School With ADAA



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# Improving Your Human Resources Department

BY DEE FISCHER AND GREGROY MOKOTOFF

**It takes a lot of moving pieces to make a dental group successful,** all working together to grow and improve the business. The human resources department is a critical piece of that puzzle, providing your employees with the resources they need to be engaged and productive team members of your organization.

Without a healthy HR department, your organization will lack the fundamental tools it needs to maintain a healthy atmosphere for your employees. Everything from your company culture to your hiring initiatives to employee engagement to providing a comprehensive benefits package will suffer. While there are plenty of systems and processes that you can put in place, you will need humans to implement those systems.

Gregory Mokotoff, the Regional Director for North American Dental Group explains his approach to improving the culture at his organization, saying, “In The E Myth, they talk about hiring ordinary people, but why don’t we try to hire extraordinary people? What are we looking for in our staff members? Well, I want them to be humble. If you have a big ego, that generally does not survive in our type of environment. You’ve got to be hungry.

I want you to want more than you have today. I want you to need to improve yourself.”

Improving your HR department will not only benefit your organization, but you and your employees as well. Ignoring an unhealthy HR department, or even foregoing an HR department altogether, will ultimately harm you and your employees and make it harder to hire new recruits.

## Continuity across the organization

Continuity and communication across the organization is a critical part of operating a business. Your employees need to see daily communication to understand what is happening in the office, what is happening with their coworkers, and sometimes to remind them what is expected of them.

Dee Fischer, CEO of Fischer Professional Group, said, “You could use Slack, you could use Teams. The thing I like about these tools is they bring awareness of what is going on in your organization. It is also accountability. People are seeing what is going on with the organization and with their peers.” At Fischer’s Professional Group, Fischer and her team use a consultative approach to understand the challenges that your dental practice is facing and how you can overcome those challenges.



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Fischer's Professional Group uses score cards to track business objectives to provide accountability to businesses about what is happening within the organization on a daily basis. Fischer said, "Are you tracking unscheduled hours in your practices? That is one of the things we have on our scorecards at Fischer Professional Group. We should be tracking unscheduled hours and how many unscheduled hours you had for the year. I showed a practice the other day, they needed two less hygienists and one less provider, because there were so many unscheduled hours."

Using tools to improve communication throughout the office will greatly improve communication and continuity among your employees. A shared experience can also improve continuity, like a corporate retreat or reading a book. The focus is to get everyone on the same page. Mokotoff said, "Slack is a great way to get continuity across your organization. Another great way is to have people read a book together. What you want to do is look for a book that everyone could read from the janitor all the way up to the CEO and understand."

### **Leveraging leadership development**

Developing leaders and training associates is another crucial component of HR, as well as another way that your organization will suffer if your HR department is unhealthy. "Leaders need development," Fischer said. "They need to be challenged. Build that into the budget. Is there a budget for culture? Is there a

budget for team meetings? All those kinds of things need to be built into the budget."

Provide opportunities for your leaders to take that next step in their role, improving their professional and personal development as an employee of your organization and a member of the dental industry at large. Giving your leaders every opportunity to succeed will only help your team to achieve business goals and grow. Fischer also says that investing in the future of your company means budgeting for acquisition and growth. "There also needs to be a budget for succession planning, an acquisition team and transition team that costs money."

## **Developing leaders and training associates is another crucial component of HR, as well as another way that your organization will suffer if your HR department is unhealthy.**

### **Recruiting new team members**

One of the most important parts about HR is finding new talent and recruiting the right people for your dental group. Improving your HR department will not only simplify the internal hiring process for your team, but it will also make your organization stand out in the sea of companies looking to hire people.

Hiring and training new employees is hard enough, but the actual casting of the net and the search might be even more difficult. Writing

a job description is sometimes considered a lost art form. It requires very specific ingredients to write a good job description.

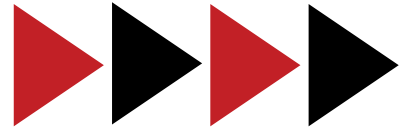
"We need to think about what goes into a job description and how clear the job description should be," Fischer said. "It should tell you what the working conditions are. Are you standing up? Are you sitting down? What are we doing? It should include the core values of your company. We want culture. We want trust. We want togetherness. We want generosity."

Finding good candidates is one thing but hiring the right one is something different altogether. Carefully review the candidate's qualifications, ask engaging questions about

their experience and what they're looking for, and clearly outline the expectations for the role. If you do all the hard work on the front end, you might just minimize the chances of hiring the wrong person.

Mokotoff says, "If you are a doctor, I want you to be able to think you want to produce more tomorrow than you did today. Maybe you want to learn a new procedure. If you let people into your organization who are ok just being comfortable, then those are the results you are probably going to get." ■

**[ULTIMATE GUIDE]  
TO HIRING, RETAINING, &  
COMPENSATING ASSOCIATES**



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 abundantly-minded, entrepreneurial-thinking, growth-oriented 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, The DEO members have 1,500+ practices with an aggregated combined revenue of \$2.56 billion. The DEO offers individual membership options (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 a yearly Growth Summit open to the public.



The DEO has curated these resources to help dentist-entrepreneurs/leaders of emerging dental groups take the next step toward achieving their visions. One area where we see dentist-entrepreneurs time and again seeking guidance for growth is hiring, retaining, and onboarding associates. To grow your group, you need to get out of the chair or spend less time there. No doubt it can be daunting to introduce associates into your group — making sure they align with your vision and culture — but we can help.



# 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, or 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, to systems and infrastructure, to revenue cycle management, to creating leaders, and more.

The DEO understands these issues, having helped 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.

The team component of The Model is pivotal to growth, especially associate hiring/retention. This guide can help you optimize your hiring system, ensuring that associates are aligned with your vision and that your team is not in chaos but stays in momentum.





# HOW TO HIRE, RETAIN, AND COMPENSATE ASSOCIATES



“We don’t want to be a pit stop in your career.” That’s the powerful statement that Mike Agugliaro, CEO of Business Coach used at the beginning of job postings. He hired employees for the long term and let them know that’s what he was doing. Right now high employee turnover seems to be everywhere. But just as Mike developed a culture that ensured long-term retention, you too can buck the trend of high turnover in your dental organization.

In this market, you have to keep your key players. Of course everyone is key, but without committed associates, you simply can’t scale as fast. Therefore, we’re excited to share with you our recently updated, “[Ultimate Guide] To Hiring, Retaining, & Compensating Associates.” To download it, simply scan the QR code to your right, to gain instant access. It’s one of our most popular resources and we think it will be a help to you, especially now.

It’s important to note that a lot of factors play into recruiting and keeping staff / associates. Many entrepreneurs run into the mistake of thinking that money is the only motivator for hiring and retaining employees. While it’s true that money is definitely one of the larger motivators, there are many other factors that prospects and employees consider when joining and staying at a company respectively.

Since associates are the bread and butter of your dental group, it’s of the utmost importance to review and optimize your approach to all the factors that go into hiring and retention. Bringing on the “right” associates



and ensuring they align with your vision will allow you to focus on the business of scaling your dental group. This guide offers tips, tactics, and best practices in the areas of hiring, retention, and compensation. Inside you’ll also find a hiring assessment tool, recommended team profiling assessment tools, as well as additional resources to access. Following is a sneak peek of what’s inside the guide.

## Highlights Of The Retention Tips You'll Find In This Guide:

### #1: Hire the Right Candidate in the First Place

Play to your strengths. Ask prospects, “what’s your biggest motivator?” or “what do you value the most in a company?” Their answer(s) may give you an idea of your ability to retain them.

### #2: Don't Become Complacent

Assess your strengths and weaknesses using the DEO C.L.A.M.P.S. Associate Candidate Motivation Model. This model outlines multiple factors that drive new prospects to join, and existing employees to stay. As an entrepreneur, you should highlight the things you do well on job applications, and improve on things that could be better to retain these hires. (To use this model download the guide by scanning the QR code to the left, to gain instant access.)

### #3: Offer Perks to Improve the Personal Lives of your Associates

A good example of this would be a daycare. Many associate dentists are at the age where they’re starting families or already have families. Having a daycare onsite or offering a stipend for offsite daycare addresses a problem that many young families face in their personal lives.

### #4: Use Anonymous Employee Engagement Surveys

This will help you monitor how satisfied and engaged your associates are. Are they happy to show up and work toward their potential? Address any red flags to improve retention among employees and associates.

### #5: Recalculate Share Price Frequently When Scaling

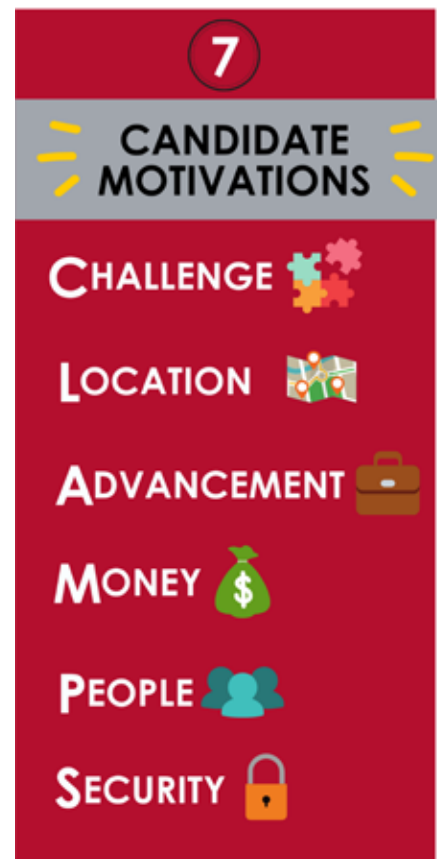
This only applies to owners who have decided to issue company stock as a way of compensation to key performers; however, it’s a good retention tool for those doing down this path. Assuming your company is growing, it might be a good idea to recalculate the share price frequently.

### #6: Build a "Legacy," Not a "Done and Gone" Practice

Many owners run into this dilemma as soon as the thought of exiting becomes more apparent. Owners have this idea of selling high then riding off into the sunset. Unfortunately, thinking in this way is detrimental to retention. Be parental in your leadership style and have an altruistic mindset to retain both employees and associates.

### #7: Learn from Maslow's Hierarchy of Needs

No matter what generation, people want their lives to matter. They want to make a difference. They want to know their contribution matters. They want to feel their involvement will impact others. Actively engage with and encourage your associate's individual goals.



# Developing a Winning Culture

DR. GREGORY TOBACK



**My passion for cultivating a “championship team” was one of the initial drivers that motivated me to begin scaling my dental business.** Sports dynasties have an ability to create a winning culture and this concept intrigued me. Championship teams have a very strong bond that ties them to a common goal.

The experience of connection and community has been explored by authors including Sebastian Junger in his book “Tribe: On Homecoming and Belonging”. Junger argues that the bond of the tribe is strongest when there is a great and common threat to all members of the commu-

nity. There is a purpose that brings the tribe into a single focus that creates this primal connection. Once the threat has passed, the challenge of perpetual tribal unity begins. I’ve reflected quite a bit on this and how it pertains to what we are building at Resolute Dental Partners.

After owning my own periodontal practice for 18 years, we started our DSO in 2018 with the goal of acquiring referral practices and creating a self-sustaining dental organization. I felt confident that I had mastered the ability to challenge a team, create unity surrounding common goals, and have the group predictably respond with a culture of enthusiasm and engagement.

However, once we acquired our first practice and I had applied my historical systems for team building,



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I was confronted with a very different reality. We were faced with a team who had anxiety about the unknown. They harbored suspicion about our motives, and did not feel connected to our company. At the same time, they became united stronger than ever in their negative feelings towards us. It was then that I realized that they had a tribe indeed, and it was a different tribe than ours. They had bonded together against a common enemy and threat. It was us, and it was as if Resolute was a foreign presence in their land.

That's when I realized we needed to grow as a company, and begin

to understand the teams that we acquired. Until we truly learned what they feared, and what their basic and vital needs were, we could not yet begin to serve them. And until we figured that out, there would be a gap between their tribe and ours.

Covid-19 has been challenging for all of us in dentistry over the past two years. However, in one particular way, Covid saved Resolute. I'll never forget when in March 2020 our entire company assembled on a Zoom call and I shared the news that the pandemic would shut our doors to patient care indefinitely. We were facing months or longer of uncertainty.

The Resolute team went into high gear to create pathways of connection for team members throughout each of our offices, to optimize communication, organize resources to support team members who would be most heavily impacted by the shutdown, and financially strategize to preserve the integrity of the company during this critical time. The spirit of community support was palpable as we witnessed a level of communication, care and kindness between all team members like never before.

Unintentionally, we saw something incredible happen. A common

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enemy had emerged that threatened all of us without prejudice. The interpersonal walls came down and we united to confront this great threat together. We learned that when the enemy was greater than our differences, it united our teams with a common purpose. Covid accelerated the creation of a unified culture within our company light years faster than we had been experiencing previously.

### **From a common threat to common opportunities**

Eventually, we all returned to the day-to-day work of dentistry. Although the pandemic was hardly over, everyone settled into the “new normal,” and we talked less and less about survival. As the dust settled, I reflected about how the unification was so natural and effortless during the height of the crisis.

**By increasing bilateral communication, we've been able to provide a voice for our team members and have them feel much more part of the process. And this results in a greater probability of acceptance, adoption and engagement of strategic initiatives.**

But what had we learned? How could we translate our experiences to the daily grind when we are not holding on together for our lives? It was imperative that we see the opportunity to gain a deeper understanding of what we experienced as a company during Covid, and use that to create momentum for our future. Our vision was to build a great

company that gave pride to each team member that they belonged to our tribe. How could we do this when there is “peace in the land” and the challenges of our daily grind begin to divide us once again?

I began to formulate this idea that if we could transform the energy we experienced from a “common threat” to a “common opportunity,” we could mature our culture into a more sustainable and healthy future. We needed to understand what makes our people feel like they belong to a community that cares for them and provides them with the resources to thrive and grow. Then we needed to be very intentional about responding to these tribal needs.

### **Connection**

Members of the tribe want to feel they're connected to the community, and that they're part of some-

thing that is happening “with them” instead of “to them.” Prior to Covid, we would battle this concept that messages coming from strategic planning sessions would be cascading down through the ranks and be received as “Resolute says we have to do this.” No matter what the intended spirit of the effort was, I realized that there was always the

tendency to interpret the initiative as a directive. By increasing bilateral communication, we've been able to provide a voice for our team members and have them feel much more part of the process. And this results in a greater probability of acceptance, adoption and engagement of strategic initiatives.

We began to get much more intentional with our company surveys. We now use a platform called “Engagement Multiplier” that provides an anonymous path for feedback while using an algorithm to measure the responses and the health of the team. We've found that using the survey twice a year gives us the proper cadence to make it meaningful. The survey itself is not enough, and it requires a responsive action by the leadership to create validation. I found that sharing the results on a monthly update video was the best way to disseminate the information of what we've learned, and what responses the teams could expect. This provided context and improved the survey participation rate.

During the shutdown, we would host a weekly Zoom call. We would review the current state of the pandemic, what Resolute was working on, and what future actions could be expected. One of the common responses that we received on our surveys was that many team members missed the weekly calls. When there is a void in communication, anxiety rises within the community, just as much as effective communication can stimulate unity and engagement. Weekly calls were not sustainable, so we developed our “Resolute Monthly Video Update”.

This was modeled almost like a 20-minute news program, and covers all of the major happenings within the company. The video is posted on our communication platform (we are presently using Slack but are getting ready to move over to Google Spaces), and everyone gives the video a thumbs-up when they have watched it, while being able to have a running dialogue about any of the content.

Prior to Covid, much of the “fun” communication between team members happened on public social media such as Facebook, Instagram, etc. During Covid we amplified our internal communication through the use of Slack, and created channels for company announcements while also fostering “fun channels” where team members could share anything they wanted from family photos to their favorite recipes. It’s become a lively digital environment that has allowed members to get to know one another even if they don’t work in the same physical space.

## Recognition

Every member of a tribe wants reassurance that they are a vital member to the common effort of the community. We want to make sure that nobody feels invisible, and that they know that their efforts are recognized and appreciated.

Fridays are commonly our “shout-out” days, where our Slack boards are alive with team members recognizing one another for outstanding performance and contribution. Managers also identify team members making unique contributions that are in alignment with our core values. These moments are acknowledged through personal texts by leadership, and filtered for public recognition of the top shout-outs on the monthly video.

Commitment to these behaviors has led to a culture of appreciation, and recognition of one another that has become a palpable habit within each of our practices.

**We are much more transparent in our compensation levels now and providing the routes to grow in areas that will lead to greater income.**

## Growth opportunity

Our first core value at Resolute is Growth Mindset, and we encourage each team member to see themselves in a bigger future. It takes hard work and commitment to grow, but it happens organically when the environment fosters openness and sharing of intellect between team members. The down time of Covid gave us a phenomenal opportunity to provide educational content, and we were amazed at the thirst our team had for learning. The overwhelming truth is that most people want to advance their career and feel like they are moving forward. Probably the most challenging of our initiatives, we are building a learning platform through Google to provide education to all of our team members starting with our “Standards of Care”. In addition, we are developing ways to build a more robust educational pathway to leadership.

Compensation is critically important to address head on, and should not be viewed as mysterious. We are much more transparent in our compensation levels now and providing the routes to grow in areas that will lead to greater income. Great team players are hungry to advance their career and we wish to foster that competitive spirit.

Resolute is a young company and we have so much to learn. However, combating the great threat of Covid made these three foundational truths quite apparent to us, in order that we might embrace them and build upon them. It’s potentially easier to unite a team in times of crisis, but the traits of a great organization are that it can translate those unifying principles once the threat has passed. ■



### Dr. Gregory Toback

is a board-certified periodontist and is the founder of Resolute Dental Partners. After practicing for 20-years as a traditional referral-based specialist, Dr. Toback began a new chapter in building an interdisciplinary dental organization. In less than four years, Resolute has capitalized on the rapid pace of practice transitions in the Connecticut market, growing to 7 locations and recruiting an outstanding team of skilled general dentists, prosthodontists and periodontists. Dr. Toback has taught practice growth principals to over 100 periodontists through his HP3 curriculum, and is a regular speaker at major periodontic and implant conferences.



# Solmetex Compliance Center

**Staying in compliance with EPA rules and regulations can be both complicated and time consuming, especially for growing dental group practices who must track recycling of collection containers and amalgam buckets filled with amalgam waste across several locations.**

Solmetex is committed to helping dental group practices alleviate the guesswork around EPA compliance, thus protecting your organization from unnecessary fines, through the use of its online Compliance Center – a first-of-its-kind website that gives dental group practices real-time insights. To be compliant with the EPA Dental Rule of July 2020, most offices that place or remove amalgam must install an ISO 11143 certified Amalgam Separator and recycle its collection container when solids reach the full line or at the one year mark, whichever comes first. Also required is the use of a clearly labeled amalgam bucket to recycle any material that comes in contact with amalgam. Lastly, offices are required to use a vacuum line cleaner with a neutral pH between 6 and 8.

The Solmetex Compliance Center portal dashboard allows you to see:

- › Accounts in compliance (offices who have either installed their amalgam separator within the last 12 months or have recycled a collection container within the past 12 months)
- › Accounts with approaching deadlines (offices who recycled a collection container 11 months ago and are nearing the one-year mark)
- › Accounts that are out of compliance (offices that are overdue for a collection container change)
- › Accounts with no separator (offices who either don't have a separator or who have yet create a Certificate of Installation within the portal)

Through the Compliance Center, dental offices have an easy process of recycling. For instance, if the dental office is recycling a collection container, a member of the

team simply logs into the Compliance Center, clicks on a shipping label tab at the top of the web page, enters in the product they need recycling for, then enters the shipping code that's on the container. The portal will then generate a UPS label, custom coded and ready to print. Once the recycler gets the container or bucket, the recycling information and certificate will automatically be available within the portal within two weeks of shipment.

Offices that are in compliance will then have instant access to their records and can log in and print their Certificates of Recycling should they have an inspection. It's a much easier way to keep track of the paperwork should it be needed.

Also through the portal, dental group practices can enroll in the Solmetex Compliance Program. Solmetex designed this program as a turnkey solution to ensure your practices are always in compliance. Participation in the program enables offices to set their own auto-delivery schedule of the required regulated product on a schedule and frequency of their choice.

Indeed, with no fees, contracts, or hidden costs, the Solmetex Compliance Center and Program will ensure your practice follows the EPA's standard, helping you avoid any unnecessary fines or office shutdowns. ■





# Solmetex Compliance Program

The Complete EPA Regulatory Compliance Solution for Special Markets

benefits

The **Solmetex Compliance Center** was uniquely designed in partnership with one of the largest DSOs in the country to provide dental group organizations a tool to manage EPA Dental Rule compliance across all their dental practices nationwide.



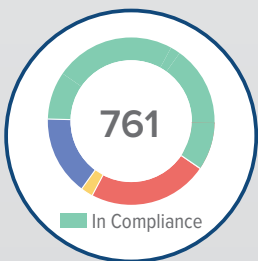
## Solmetex Compliance Center

Account management portal that provides real-time compliance data across all the practices in your network.



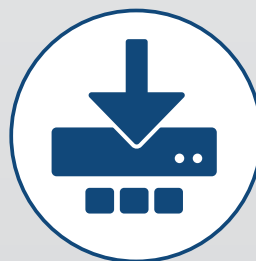
## Custom Territory Views

Custom account login with the views that fit your group's needs. National, regional or individual office logins allow you to manage your locations.



## Recycling Overview

Overall history of amalgam separator installation, plus recycling history of collection container and amalgam waste buckets across all practices.



## Account Reporting

Export dental practice account data to your desktop in Excel or PDF file formats.



## Solmetex Compliance Program

Maintain compliance nationwide by setting custom delivery schedules through your dealer/distributor partner of your choice.



## Certificates of Compliance

Access to product shipping labels, Certificates of Installation and Certificates of Recycling, available 24/7/365 at NO CHARGE.

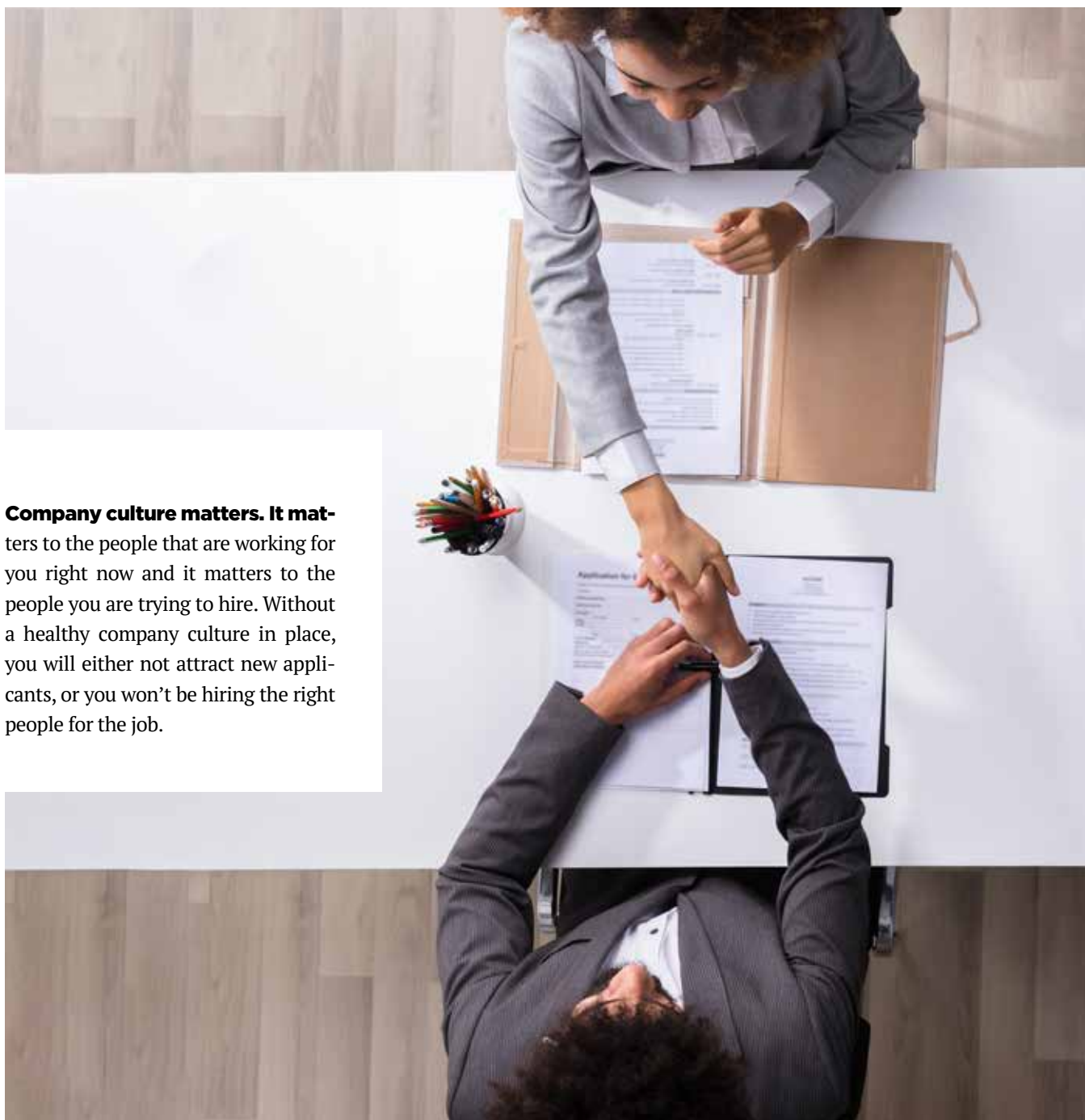
**Interested in learning more about the Solmetex Compliance Program?**

Contact our Special Markets Group at  
800-216-5505 or [special\\_markets@solmetex.com](mailto:special_markets@solmetex.com)

# Best Practices for Hiring the Right People

By Cameron Herold

**Company culture matters. It matters** to the people that are working for you right now and it matters to the people you are trying to hire. Without a healthy company culture in place, you will either not attract new applicants, or you won't be hiring the right people for the job.





Consider Google and Microsoft. Which of these companies do you think of as a great company to work for? No one ever says Microsoft. Why is that? They're both on the West Coast of the United States. They both have billions of dollars in cash. They're both in the computer space. They both hire computer engineers. They're both tech companies. Why is it that Google is the best company to work for and Microsoft never really makes that list? It's because Google decided culture was critical. From the beginning, Google decided that culture was going to be a core part of their business. This is exactly how we need to be thinking about our dental practices.

Culture may seem like one of those buzzwords that people use to be trendy, but it truly is a critical piece of operating a successful business. If you have any hope of hiring the right people for your organization, there are a few best practices you can follow to create a better environment for hiring the right people.

### **Visualize your business three years in the future**

Imagine if you could look at your locations or your business three years from now. What would they look like? Athletes use the process of visualization. They practice seeing themselves performing events repeatedly in their mind, so that when they perform the event, it becomes instinctual. Can you imagine if you were so clear on what your business looked like that your business operated on instinct?

The problem in most of our companies is the entrepreneur usually

has a vision and no one else can read their mind. It's like asking someone to describe a scene from a movie that they've never seen. If our employees can't see what we can see, they stumble through day-to-day trying to build our company for us. They aren't even making bad decisions; they're just making decisions based on what they think we want. We need to tell them what we want.

If you're going to write a Vivid Vision®, it needs to be a four- or five-page written description of your company three years from now. Get out of the office to seek some inspiration, and don't be afraid to get out of the box and dream big. For the best results, consider doing this without the use of technology. Writing this out by hand on a piece of paper will remove any potential distractions and allow you to focus on the future.

**If our employees can't see what we can see, they stumble through day-to-day trying to build our company for us. They aren't even making bad decisions; they're just making decisions based on what they think we want.**

Pretend that you're walking through your company's org chart. Describe what your marketing will look like. Describe sales. Describe finance. Describe dentistry. Describe all the different aspects of your company, using three or four bullet points around each area. Describe what the customers are saying about you, what your company culture looks like, and what your locations feel like, inside and out. Our role as the entrepreneur

is to describe it in its finished state so that the team can work together to bring that vision to life.

### **Recruiting, interviewing and hiring**

Are you looking for a way to improve your recruitment process and increase retainment? Using a recruiting bonus is a valuable approach to beef up your recruitment process. If I'm hiring a \$60,000 person, I put a \$30,000 recruiting bonus in place. Anyone that refers a new hire is going to receive a \$30,000 bonus at \$6,000 a year for the next five years. Because it's essentially free money, people will start poaching new recruits for you.

The first thing that happens for each new resume that comes in is our email system kicks back an auto reply saying, "Thanks so much for your resume. Please read our Vivid

Vision® and this article of us in the media. If this sounds like the kind of company you want to help fly to the moon, apply now and put 'interview me' in the subject line." If they don't reply using the phrase "interview me" in the subject line, we don't even read the resume. We keep moving. If they can't follow a simple detail, they would not fit in with our culture. When they reply saying that they would like an interview, we

kick back a second auto reply, saying, “Thanks again! We’ll be inviting you to a group interview. Before we bring you in, we need a quick two-minute video about why you want to work with us.” That becomes a great screening tool for culture as well.

For the recruiting process, try getting all your job postings written by a copywriter so that they pop off the page. While you might be able to write an informative job description that covers the basics, a professional copywriter can craft a compelling reason why people should come to work for you.

### Getting the right people on the bus

In the book, “Good to Great”, author Jim Collins talks about getting the wrong people off the bus, the right people on the bus, and everyone in the right seats. What he means by that is either “you’re with us or you’re not.” You get it or you don’t. There is no halfway.

**It’s the dentist that no one can stand, or the hygienist no one can work with. Studies say that the cost of keeping the wrong person is 15 times their annual salary.**

Essentially, I want you to focus on getting the right people in your organization, and the wrong people out. Even though it’s just as important as finding the right people, I have yet to find a company that works hard enough at getting rid of the wrong people. We all talk about retention, interviewing, recruiting, and culture, but we don’t talk about identifying the cultural cancers and getting rid of them.



Your receptionist should be your director of first impressions. As the first point of contact with everyone in the organization, the type of person you have as a receptionist matters. If you have a grumpy, negative receptionist, it will destroy your company. In my opinion, your dentists are the least important people in your company. With as little time as the dentists actually spend with their patients, it’s much more important to have excellent hygienists and front office employees.

When we are interviewing and hiring people, we need to be so clear on what we’re looking for. I’m much more interested in someone who is a great cultural fit than someone who has all the skills. Culture first, skillset second. Steve Jobs used to say that if he didn’t see the “twinkle” in their eyes, he didn’t bring them in to see if they had the skills because he didn’t care if they had the skills.

Our job as entrepreneurs and leaders is to grow the skills and confidence of our people. But what if you have someone who gets super high results, but with a low core values’ fit? Unfortunately, these are the people you must fire. It’s the dentist that no one can stand, or the hygienist no one can work with. Studies say that the cost of keeping the wrong person is 15 times their annual salary. Are high results worth the extra money you would be spending each year? ■

**Cameron Herold** is known as The CEO Whisperer and Business Growth Guru. As COO of 1-800-GOT-JUNK?, Cameron guided the company from \$2 million to \$106 million in revenue, expanded to operations in four countries and 330 cities, while the organization was named as the number two company in Canada people desired to work for. In 2016, Cameron founded the COO Alliance when he realized that there were no peer groups for one of the most crucial roles in the company – the Chief Operating Officer/2nd in command. For more information or to contact Cameron, visit [coo-alliance.com](http://coo-alliance.com).

# Building Effective Associate Dentist Incentive Structures

How the right incentive structure can set your organization up for long-term success with associates



**Effective associate dentist structures help to attract, hire, and retain** top talent for your organization. Finding the right way to implement these structures to improve employee engagement is crucial to the success of your organization.

In a recent interview with The DEO, John Arnold and Eric Scalzo of Waller Lansden Dortch and Davis LLP discussed different associate dentist incentive structures being used today.

**John Arnold** is a partner at Waller where he focuses his practice on representing private equity groups and their portfolio companies across the healthcare services space. Arnold

serves as go-to outside counsel for many national DSOs and has significant experience representing DSOs and dental groups on structuring, transactional, corporate and compliance matters.

**Eric Scalzo** is a partner at Waller, representing private equity clients and dentists and other providers in the formation, acquisition, growth

and sale of group practices and portfolio companies in the practice management space. Scalzo has grown a team with the knowledge, capability and flexibility to handle high 9-figure platform transactions as well as single location acquisitions for growth-minded companies.

**Waller Lansden Dortch and Davis LLP** is a full-service firm with nearly three decades of experiencing representing dental practices and DSOs on matters ranging from complex corporate, transactional, tax and compliance matters to government investigations and high-stakes litigation.

**The DEO: What is an associate incentive program?**

**Eric Scalzo:** Associate incentive programs are compensation and leadership programs designed to attract, retain and incentivize rock-star and shooting-star associates within an organization. There are two common approaches taken with respect to associate incentive programs. The first is a non-equity, but equity-like, incentive structure, and the second is an equity or ownership incentive structure. And both incentive structures offer several different flavors.

A non-equity incentive structure involves a contractual arrangement that usually mirrors the economics of ownership, but without any downside of having minority owners. An example would be bonus compensation tied to the practice's profits or the upside upon a sale of the practice. An equity incentive structure involves actual ownership. That ownership may be at the practice level or in a DSO.

We are seeing clients use combinations of these structures in creative ways to recognize leaders in their organization.

**The DEO: Why are some dental groups forming DSOs? How does it benefit them?**

**John Arnold:** There are a number of reasons why a dental group may form a DSO. For multi-office groups, centralizing back-office services may improve efficiencies and boost profitability, and a DSO structure can also provide flexibility if the practice owners wish to pursue a transaction in the future. But there are also

benefits related to associate incentive programs, and we continue to see dental groups forming DSOs to establish associate ownership opportunities and structures that allow the founders to retain control of their professional entity, implement creative incentive structures, such as office specific DSO entities and offer ownership opportunities to non-dentists. On the flip side, it is important to note that a DSO structure is not always right for every dental group. When we encounter a situation where a practice's founders formed a DSO for the sake of having a DSO, we often find a DSO structure that is not fully implemented and, in some cases, that was resulted in meaningful tax consequences in connection with a sale or required significant work to correct the structure.

**For multi-office groups, centralizing back-office services may improve efficiencies and boost profitability, and a DSO structure can also provide flexibility if the practice owners wish to pursue a transaction in the future.**

**The DEO: Can you talk about liquidity options for DSOs?**

**Scalzo:** Unless your practice is one of a handful of states that allows non-dentist owners, a properly structured DSO is key to investments by non-dentists – which can range from a sale to private equity group or existing DSO platform to a growth equity investment that provides capital to grow an existing

platform to an investment designed to reward key management team members who have contributed to a practice's growth and success and keep them engaged for the next stage of growth.

**Arnold:** The key management team members – those are your game-changer office managers or senior executives who expect equity as part of their compensation package.

**The DEO: Can you break down the key associate incentive structures?**

**Scalzo:** A common first question we are asked is whether to implement a bonus or so-called “phantom equity” structure for associate dentists. This is the main non-equity incentive structure and is essentially a

bonus compensations structure that attempts to recreate the economics of ownership. This can be done as part of an employee agreement, or even a tag-along agreement, or you can set up a contractual arrangement where you bonus out or give the associate dentist an equity-like incentive. It's a very flexible structure, but it is important to remain attentive to regulatory compliance



considerations at a federal and state level. You can tie an associate's incentive to metrics like the associate's individual production, office production, or even multiple office production. If you have a team leader or someone that trains new dentists or hygienists into the fold, you can bonus them out on their contribution to the enterprise – but, again, it is important to consult with your legal advisor to ensure the structure is compliant.



## **Under a DSO model, the dental group remains owned by one or more licensed dentists and in control of all clinical operations and aspects of the business, and the associate dentist is an employee of the dental group.**

**Arnold:** The flexibility and customization are the biggest positives here. You can have something as simple as a one-paragraph bonus structure, or you can have something as complicated as a formal phantom equity plan. It can get really sophisticated.

You can also avoid corporate governance and fiduciary duty issues with this structure, and associates may like that they do not have to fund a buy-in. But there are some downsides and limitations as well. An associate may desire true ownership, and they might lose some of that ownership mentality if they're not an actual owner. Additionally, compensation is taxable as ordinary income and, while compensation

can be tied to a sale, the associate would not participate as an owner in a liquidity event.

**Scalzo:** Another structure is true ownership in the professional entity, which is familiar to everyone and easy to understand. Either the associate dentist owns the whole practice or dental group. In this case, we often create contractual arrangements to limit the associate's ability to control the practice entity or otherwise make decisions on its behalf.

**Arnold:** The next model is a DSO-driven model, and is not limited to incentivizing associate dentists. It can also be used to reward and

incentive non-dentists, like practice managers, or to attract executive talent. Under a DSO model, the dental group remains owned by one or more licensed dentists and in control of all clinical operations and aspects of the business, and the associate dentist is an employee of the dental group. The dental group contracts with the DSO for non-clinical business and administrative support services in exchange for service fees, and the associate dentist is an owner of the DSO.

To localize the associate dentist's incentive, we continue to see a lot of interest in creating DSOs that are specific to the office or offices at which the associate dentist works. These are often referred to as "Sub-DSOs" and there are a number of platforms that have found this to be one of the most effective ways of aligning incentives and creating an ownership mentality among associate dentist partners. But a major trade off is that Sub-DSO structures involve more paperwork and can be more challenging from an administrative and accounting perspective.

**Scalzo:** In our experience, there is not a one-size fits all approach to associate incentive structures and it is important to find a structure or combination of structures that is best for your organization. We continue to see creative ways that allow dentists to incentivize each other, increase access to patient care and improve patient outcomes, and we are excited to be part of this industry as it continues to innovate. ■

# Industry News

## Guardian Dentistry Partners announces new partnerships

In late 2021, Guardian Dentistry Partners announced partnerships with dental practices in New York, Pennsylvania, Texas, Alabama, Michigan, North Carolina, South Carolina and Virginia.

The latest announcement of new partnerships adds 30 more locations into the Guardian family and brings GDP's total practice count to 84. The Dental Partnership Network has seen its partnerships across the country grow exponentially since its founding in 2018 and now has a commanding presence in 10 states.

The most recent partners to join the Guardian family include:

› Drs. Art Steineker, Bubba Waters, David Lieux and Darren Dillon with their Alabama/Florida platform, Gendus Dental Partners, supporting

seven practices that span from Birmingham, Alabama, to Panama City, Florida

› Dr. Marc Liechtung, with five practices located in the New York City area

› Dr. Jonathan Penchas, with his Midtown Dentistry, comprising five locations in Houston

› Drs. Raphael Goldstein and Steven Jaffe, with three offices in Novi, Dearborn and Brownstown, Michigan

› Drs. David Deeb and Michael Fanning, located in Calabash, North Carolina

› Rhett Duleba, who has two dental practices in Columbia and Sumter, South Carolina

› Drs. TJ Patel, Vivek Kashyap and Jay Shukla, located in Matthews, North Carolina

› Dr. Eric Grimes, located in Lenoir, North Carolina

› Dr. Michael Rogers, located in Arlington, Virginia

› Dr. David Strassman, located in Allentown, Pennsylvania

› Dr. Charles Wolfe, located in Easton, Pennsylvania

› Dr. Michael Parthum, located in Clawson, Michigan

"At our core, our organization is designed to deliver exceptional service and growth opportunity for our Doctor Partners," said Dr. Hisham Barakat, GDP Chief Clinical Officer. "We're excited about how our footprint has rapidly expanded, but we are even more thrilled about the type of partnerships we've solidified. These are all leaders in their field and in their communities. And their ability to continue to make a bigger impact – be it locally or regionally or nationally – is catalyzed with Guardian. They are the GDP core values personified."

## Heartland Dental celebrates "unprecedented" growth in 2021

Heartland Dental announced the company experienced unprecedented growth in 2021 by adding 424 new practices to its footprint across its 38 states. Through the addition of 54 DeNovos, 92 Affiliations and 278 office locations through its acquisition of American Dental Partners, Heartland Dental now supports more than 2,300 doctors in more than 1,550 offices representing an increase of well over 150% in supported locations

over 2020. Heartland Dental President and Chief Executive Officer Pat Bauer noted: "Heartland Dental's support model and service offerings are widely respected within the industry, and our significant growth is a combination of the trust that doctors place in our resources and the dedication of our network of business and support professionals. Our proven systems and processes help supported doctors deliver exceptional oral care to their

patients, and maximize their own clinical and economic growth now, and into the future. Doctors know they can trust that the care they provide in their communities will continue to thrive with the support of Heartland Dental. And as we head into 2022 and beyond, Heartland Dental is committed to continuing to provide solutions to meet the unique needs of doctors, their practices, and their patients."

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# DSO Secrets: The Ultimate Guide To Building Your Dental Empire

By Laura Bowles



**The first book publication from** DEO Dental Media Publishing (an arm of The Dentist Entrepreneur Organization) “DSO Secrets: The Ultimate Guide To Building Your Dental Empire” by Emmet Scott is a No. 1 Amazon Bestseller.

“DSO Secrets” was officially released on November 16, 2021, and quickly became a No. 1 Amazon Bestseller in the Dentistry, Dental Office Practice, Dental Assisting, and Management Skills categories and landed in the top 10 of the Entrepreneurship and Management categories. It has stayed in the top 10 of the Dentistry category since its release.

In the book, Emmet shares the vast insight he’s gained from founding and running a multi-million dollar DSO, including supporting clinicians, executive teams, being on boards of DSOs, being a partner in emerging DSOs, and more.

Today, dental practice owners and their teams have ambitious

visions for growth. Then complexity sets in. To be successful, practitioners have to survive in the world of business. But there are DSOs out there that have already overcome these challenges — DSOs that hold the secrets dental groups need. “DSO Secrets” walks dental leaders step by step through the process of creating the doctor, team, and patient experience necessary to achieve their vision of growth, whether their goal is to be a top clinician in a single practice or to build a multi-practice portfolio.

This book is varied and offers an in-depth focus on what any up and coming dentist-entrepreneur or dental leader needs to know to crack the DSO scaling code. Topics include: what it means to be an entrepreneur, becoming a top-level executive, creating an amazing customer experience, marketing, messaging, human resources (associates), finance, compliance, and more.

Emmet is CEO and co-founder of Community Dental Partners which

he has helped grow from one practice to a 90+ location DSO. He hosts the popular DSO Secrets podcast, is president of the Association of Dental Support Organizations (ADSO), and is a Partner, DEO.

Here are just a couple of the powerful reader reviews from Amazon:

**A must-have for all dental entrepreneurs!** “As someone who has been in the dental field for over 10 years and built my own business, I can highly recommend Emmet’s insight and guidance in this book. He’s an excellent resource for anyone trying to take their group to the next level!” – **a 5-star review from Niekü Manshadi, Co-Founder of OrthoDent Management**

**Comprehensive and wise:** “Emmet Scott has a generous heart and a big brain. He is guided by a deep and current experience of the DSO industry which he is helping to create in its modern form. He has an abundance mentality which will help many achieve their goals in this industry.” – **a 5-star review from Nathan Chitty, CFO and Business Development Manager of Operation Dental, LLC.** ■

#### For more information:

<https://bit.ly/FirstDEOBookDSOSecrets>  
<https://www.linkedin.com/in/emmetscott>  
<https://geni.us/DSOSecrets>

# Commission Compensation

**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.*



**Ramin Bahram asked:** Hi, is anyone using a commission based compensation system for their hygienists? With salaries of hygienist having gone up quite a bit lately, does it make sense? What kind of percentages are we talking about?

## DSO Secrets Facebook page members responded:

“My daughter is a hygienist and makes 25% of her net production. She does two columns with an assistant.”

– **Angela Jones Golden**

“We tried in our office and it just didn’t work. Hygienists got overly competitive with each other, and created a lot tension with the front when there were holes in the schedule. Now we do a competitive market hourly wage and then bonus based on KPI such as perio dx & fluoride.”

– **Chris Vanderpool**

“We do 30% of adjusted production. The requirement is that the hygienist needs to average \$225 average production per patient to quality for the commission.”

– **Brooke Adair**

“I have also used a hybrid. The hygienists I have employed by and large want the safety of an hourly, so that’s what they get. In addition they have gotten a percentage of additional procedures they can influence and perform. In Florida that’s sealants, fluoride, etc.”

– **Dick Lester**

“I built a 3 tier option for hygienists for their compensation. Not every hygienist wants the same thing or is motivated the same way.

1. Slightly lower base plus compensation (15% bonus after prod goal is hit for the day)
  2. Higher base
  3. Straight commission percentage of net production that day
- It gives your hygienists the autonomy to pick what is right and motivating for them and they feel very valued too.”

– **Kalie Popp**





# Your Systems Your Way



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- Claims Submittal & Tracking
- Handling Of Denied Claims



## Business Team

- Working Your Recare
- Reactivation Of Patients
- Scheduling & Confirmation Of Appointments
- Incoming & Outbound Phone Support



## Revenue Management

- Posting Payments
- Account Audits
- Payroll Support
- Accounts Receivable & Payables



## Additional

- IT Support/Help Desk
- H.R. Support
- Compliance
- Policy Manuals/Processes



## No Contract

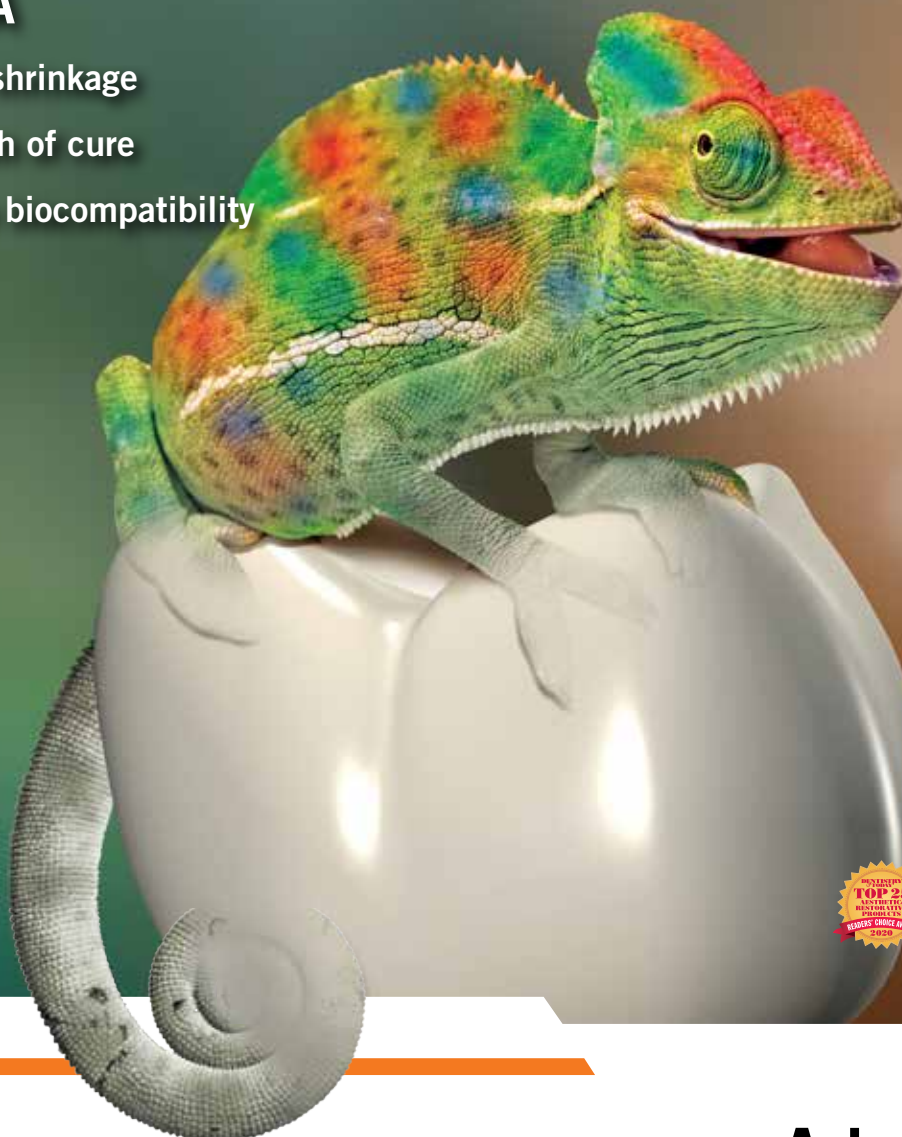


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