

# DE | MAGAZINE

DENTIST ENTREPRENEUR ORGANIZATION

## Women in DSO

Women Leaders in Group Dentistry

**Meet the Women**  
in DSO Board

**How to Address  
Gender Inequity**  
Within Dentistry

**Changing How  
People Feel**  
About the Dentist

**Leading Women  
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**A Vision**  
for the Future

Dr. Aman Kaur



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# Changing the Narrative

By Josey Sewell



## A great relationship is about two things:

1. Appreciating the similarities, and
2. Respecting the differences.

We are all about girl power at my house. In fact, traditional gender roles cause significant confusion for my children (19, 12, and 8 years old). My husband is a stay-at-home Dad, and I'm the breadwinner of our family. My 8-year-old has always known Dad to be at home and the one that handles homework, soccer practice, cooking, cleaning, and shopping. The other night before bed during our nightly snuggle fest he said to me, "Mom, why do people always talk about 'Mom's cooking'? Moms don't cook, Dads cook!" My family is proof that we can change the future by changing the narrative our children hear.

Over 90% of dental team members are female and 50.6% of graduating dentists are female. However, less than 10% of executives in dental groups and DSOs are female. Research tells us that when women are part of leadership teams, the culture and profitability of a company improves significantly. So why aren't more women in executive leadership roles? The answer is complicated, and deserves the industry's attention.

I've had more experiences than I can count when I was the only woman in the room. I've been blessed to work with men who treated me as an equal partner, respected my opinion, and honored who I was. I've also had many occasions when my opinion was disregarded, my ideas stolen, and my kindness taken advantage of. More than once I was promised things like shares or ownership in a company, only to find myself the recipient of empty promises. That's why I risked starting my own company in the middle of a pandemic.

We have to educate our male counterparts on what it means to work with women in positions of leadership, and help them embrace the differences in leadership styles as strengths. Women don't need to act more like men to lead. They need to lead in a way only women know how – through nurturing and supporting others.

Yet, the greater struggle we have in securing women in leadership is the way women treat other women. If you ask any woman despite their title, background, education, or position they can all share stories when they have been hurt by other women. I've witnessed firsthand social media "influencers" who claim to support other women distinctly tear down and destroy other women in person. We can do better.

If equality was an easy fix, it would've happened already. The most important thing we can do is to educate ourselves, seek first to understand then to be understood, and find ways to intentionally make choices that might feel uncomfortable because we've never done it before. My challenge to you is to expand your thinking and your decisions to bring in people who are different from you and enjoy the process of learning something new.

We are in the most exciting and transformative time in dentistry. The decisions we make today will cause a ripple effect into the future. May we all choose to be more kind, more inclusive and more thoughtful about the people we surround ourselves with and trust to lead our teams and companies.



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# Reprioritizing Our Workdays and How Employers Should Embrace It

BY MARYAM BEYRAMIAN, DDS, MBA

## Friendships, relationships, work, and family must fit into a 16-hour day.

We fill our hours and days with matters that align with our objectives and goals — they define us. As we grow old, the balance of time and money tips, and we end up cherishing more of our minutes, as the infamous White Rabbit once did.

I started a Dental Support Organization (DSO) in 2002. I had recently graduated dental school and had big ambitions. One location, led to two, which led to six. Both my husband and I were working six days a week with a young child at home. When I got pregnant with our second child, I knew things needed to change; my 16 hours had to be filled differently, so I cut down to a part-time schedule. When our second group, Westwind Integrated Health, formed years later, my life had changed and so had my needs.

Prioritizing and optimizing the utilization of time is an important aspect in life. As a professional, we can be drivers of our own destinies and authors of our own novels. Dentistry has evolved for professionals and with the rise of various DSO affiliations we can build the career we want. We no longer have to make lifestyle choices — we can finally have harmony between our personal and professional lives.

Parents no longer want to sacrifice moments with their children



and our applicants have different needs especially after COVID-19. New expectations for a work-life balance required the creation of a more adaptable workplace that brought to the forefront work flexibility and family relationships. With support through DSOs, associates and partners can paint their own landscapes of an optimal 16-hour day.

As an employer, I am always looking for the best talent. The lens of which I look at recruits has shifted, however; now I look for great talent and create spaces and schedules to fit their needs and priorities. At Westwind, we just hired a phenomenal new dentist and created a schedule around her, so she can pick up her child from school each afternoon.

Though she may work fewer hours than other providers, that doesn't speak to her talent or level of productivity. Neither is sacrificed. She's one of many employees — men and women — at Westwind with flexible work-home schedules like this.

By reimagining work-life balance, our patients are served well, employees and their families benefit, and our business flourishes. I'm thankful for the talented professionals that work on my team. Developing schedules that allow them to better fulfill their obligations as parents or caregivers gives me more pride and satisfaction in my DSO.

Now more than ever, we need to have an open mind when speaking with candidates. That's why as a member of the ADSO Summit Curriculum Committee, we developed sessions focused on attracting untapped talent and creatively addressing the changing work-life expectations. Having a compassionate dental office promotes a healthier, happier workplace and that in turn provides better care to patients. The upcoming ADSO Summit, beginning March 29 in Austin, Texas, is an opportunity to discuss the future of dentistry. Come visit me in the HR Panels, I would love to know how you paint your 16-hour day. ■

**About Dr. Maryam Beyramian:** Dr. Maryam Beyramian is the CEO and Co-Founder at Westwind Integrated Health, which has 11 locations across Arizona. Dr. Beyramian received her Doctorate of Dental Surgery (D.D.S.) from the University of Michigan in 2001 and graduated at the top of her class.

# Leading Women in Dental: Susan Greenspon-Rammelt

**Susan Greenspon-Rammelt is Chief Legal Officer, EVP of Business Affairs, Corporate Secretary, and a member of the Board of Directors of SmileDirectClub, the next generation oral care company with the first medtech platform for teeth straightening. Prior to SmileDirectClub, Susan served as a corporate law partner at Foley & Lardner LLP, where she represented domestic and international enterprises, and a partner at Dentons US LLP.**

In the following Q&A, Susan discusses her involvement as a founding board member of Women in DSO, as well as how SmileDirectClub partners with dentist entrepreneurs in their growth journeys.

**Q: You are a founding board member at Women In DSO®. Can you tell us why you wanted to be involved?**

**A:** As a woman in the legal profession, I have long been a proponent of encouraging and developing female leaders. It's extremely important for all of those in a leadership position – both men and women – to mentor and inspire the next generation of female leaders to create a more balanced industry. I was excited to have the opportunity to join Dr. Aman and Women in DSO, and I look forward to the work we will do to create a much needed and important space for the next generation of leaders in DSOs.

**Q: What are the goals or initiatives you are looking forward to working on with Women In DSO®?**

**A:** I am really looking forward to the mentorship initiatives that we have started and will continue to launch through Women in DSO.



Susan Greenspon-Rammelt

Mentorship has been one of the most meaningful parts of my career. I have been fortunate enough to mentor many emerging female leaders over the last 20 years. It is incredibly rewarding to have

played even a small part of so many career growth journeys and knowing the impact these leaders will make to better our world.

We have a lot planned for our Women in DSO members and future members. Beyond mentorship initiatives, we also provide networking opportunities. Building relationships is so key to creating a community of female leaders and I look forward to meeting more women in the industry and really being able to kick off some of those opportunities in Vegas this month.

**Q: As a leader at SmileDirectClub, what opportunities does your organization have to help dentist entrepreneurs in their growth journeys? Specifically, women?**

**A:** At SmileDirectClub, we look for opportunities to profile, support, and celebrate female dentists and orthodontists that want to embrace change, technology, innovation and share in our mission to democratize access to care. We recently partnered with celebrity cosmetic dentist, Dr. Amira Ogunleye. Dr. Amira is part of the SmileDirectClub Partner Network and really exemplifies our mission in her day-to-day work. Dr. Amira provides opportunities to aspiring women leaders through her many pursuits, including the recent launch of her mentorship program that will support the next generation leaders within the dental industry. We look forward to continuing to work with many women in the dental industry both internally within our dental team and externally with our many Partner Network doctors.

Practice growth is also at the top of our list to support dental entrepreneurs. Through our Partner Network, dentists and orthodontists now have the ability to offer SmileDirectClub clear aligners to their patients. With cost and convenience as the two big brand differentiators for our business model, we are giving doctors the opportunity to easily add a new service offering for their patients while also enabling them to reach more patients through our marketing efforts and in-turn, grow their practice. ■

# Changing How People Feel About the Dentist

Swish Dental Founder Dr. Viraj Desai is reimagining what it means to deliver a first-class experience for patients, and the dentists who care for them.

BY GRAHAM GARRISON



**When Dr. Viraj Desai, DMD, first started practicing dentistry, she was** a little surprised with how the style of everyday offices closely resembled that of an emergency room. There was an emphasis on optimization, quick clinical diagnosis – but not an environment that catered towards personalization.

“While most patients were familiar with medical doctor visits, I found that a number of patients had rarely been to a dentist, and were anxious about the unknown,” she said. “Along with getting a quick diagnosis, they were looking for a personal connection to help guide them through their concerns.”

Dr. Desai personally faced uncertainty while navigating her own career journey. Who could she ask for advice for turning a solo practice into a group practice while cultivating a workplace culture that fostered growth and opportunity, especially for women in dentistry?

“I think in this case, both the patients/doctors wanted the same thing; an environment that was supportive to all needs.”

This led Dr. Desai to create her own dental group practice in 2017, Swish Dental, by reimagining the experience for both patient, and provider.

## **New and fresh spaces**

For Dr. Desai, the first big step for Swish involved creating spaces



within the locations that were new and fresh, but didn't scream to patients that "we need to get you in and out." Her vision focused on studios that were friendly, welcoming, and familiar places for people to receive care. To reflect that vision, the offices embody the unique characteristics of the Austin neighborhoods they are a part of. "Most people, when they come to Swish, it's not just because of the dentist; they're looking forward to being in the presence of familiar faces, and a familiar place."

Creating a vibrant group dynamic amongst Swish dentists was just as important as the patient experience. Indeed, dentists who feel good about where they work will in turn give patients access to better types of care. "Culture is incredibly important in creating a warm environment, but also one with guidelines," Dr. Desai said. "We obviously strive to make the patient experience as great as it can be, but that's only accomplished if the organization believes in the values and systems/processes that are put in place."

Dr. Desai said she strongly believes in empowering her staff. Training, especially in regard to personal project management, is critical. "We want to give our employees as much autonomy as possible, and that starts with making sure their personal lives are prioritized."

Swish offers hands-on support and mentorship during an individual's employment. Team members can get both feedback and hands-on help or assistance if needed. "The empowerment of the staff and culture around that has been greatly beneficial for

us," Dr. Desai said. "While we hope that every employee stays with us for a lifetime, I'm incredibly proud to know that if they do leave, they can look back at the company and acknowledge that what they learned at Swish only helped them propel their career."

### Here to serve

While employee retention for any business has been tough over the last two years, Dr. Desai said Swish leaders have found that going back to their culture, mission statement and values has helped the



organization navigate workforce challenges. "As far as retaining our employees, providing a purposeful place for them where they feel that they support the company, and the company supports them, has been truly beneficial."

To date, Swish has 150 employees, 12 locations, and 16 dentists. Dr. Desai said that they're looking to build out their infrastructure in 2022 and possibly add some locations.

As a result of the pandemic, consumers are wanting more on-demand service, including with healthcare. "Overall, patients want the best of the best, and they are willing to pay for it," she said. "So the level of expectations, and asks, have increased tremendously."

Dental group practices that want to successfully navigate those changing expectations must find the right balance of evolving to meet marketplace changes, while staying true to one's mission statement. For Swish, it all comes back to the patient experience. "We've had a ton of great innovation these past few years," Dr. Desai said, "but at the end of the day we're in a service business and need to be cognizant about that." ■



Dr. Viraj Desai, DMD

# Dollars & Sense

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**Maintaining staffing costs while** remaining competitive within the labor force is a prevalent struggle for dental practices across the country. Every practice strives to remain profitable and compliant—while providing a high standard of care to their patients. “Wage creep” has further complicated this problem.

The Department of Labor (DOL) reported that consumer prices rose 5.4% during the 12 months preceding September 2021. Inflation at a wholesale level climbed a staggering 8.3% from August 2020 to August 2021. Most notably, the Social Security Administration announced that beneficiaries will get a cost-of-living adjustment of 5.9% in 2022—the largest increase in decades. Inflation fears are not only substantiated; it’s already having an impact on employee wages in the dental field.

Wages, and associated human resources costs, are usually the single largest expense for dental practices. Compounded with inflation and wage creep, these expenses are a foundational area of focus for dental practices to maintain profitability. onDiem’s CEO, Joe Fogg, observed these obstacles the dental industry

is facing, and was driven to provide a solution that not only increases profitability and reduces costs for dental practices, but also addresses the need to attract and retain qualified dental professionals.

The solution—launching in Spring 2022—is a patent-pending product called onDiem ClearPay. With increased labor transparency, practices will receive a line-item invoice for hired temp shifts. These line-items will include professionals’ wages (rate X hours worked), a breakdown of labor-burden costs (FUTA, SUTA, Insurances, etc.), and onDiem’s service fee.

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This radical shift in transparent staffing and evaluating profitability is a new way of thinking—one that onDiem believes is long overdue. onDiem ClearPay will help to educate practice owners and managers about the true cost associated with W2 employees (state and federal taxes, insurances, etc.) while clarifying the misconception that staffing agencies are padding their profits with inflated service fee charges. It is also important to note that each state has differing tax rates, pay in caps, and insurance rates.

Additionally, as part of onDiem ClearPay, onDiem will be building a seamless and automated Invoicing and Payment Portal into the Practice User’s current onDiem account. This product will be available to onDiem practices. onDiem Service Fee will differ based on Subscription Enrollment status. ■

**About onDiem:** Headquartered in Portland, Oregon, onDiem’s staffing platform connects dental practices with dentists, hygienists, dental assistants, and front office personnel for flexible staffing opportunities. With a free account, practices may create temporary shift posts and communicate with candidates. Professionals may create a robust profile and resume, while searching and applying for temporary and permanent jobs in their area. As employees, not contractors, onDiem professionals enjoy healthcare benefits, paid time off, employer-paid taxes, and insurance coverage, along with the ability to set their own work schedule and hourly rates. onDiem eliminates the burden of staffing compliance, so practices can focus on maximizing production and revenue. onDiem’s platform serves over 34,000 dental professionals and over 16,000 dental practices nationwide.



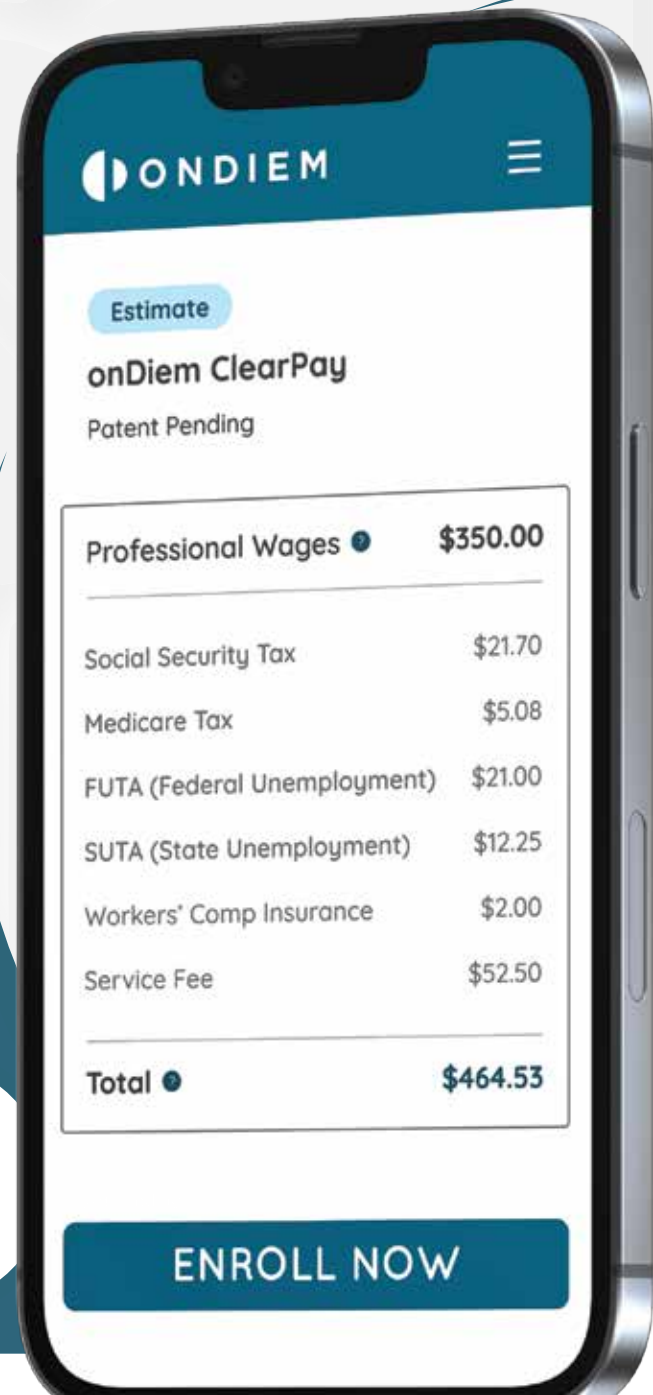
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# Comprehensive Care

Dr. Bobbi Stanley's well-thought-out approach to her dental practice offers patients everything they need for complete oral health. BY PETE MERCER



**Earning the trust of your patients might be the most critical part of dentistry.** Many patients experience fear and anxiety when it comes to receiving dental care, and a good dentist will actively work to alleviate those fears and earn the trust of their patients with each visit.

Dr. Bobbi Stanley is the Co-Owner of Stanley Dentistry, and Co-Founder/Senior Instructor, CEO at the Stanley Institute for Comprehensive Dentistry. Based out of North Carolina, Dr. Stanley works to build that trust with her patients every single day through comprehensive dental services and a team that is equipped with the latest tools and innovations to provide better patient care.

## What makes Stanley Dentistry unique

Stanley Dentistry is located in Cary, North Carolina, just west of Raleigh. Established in 1995, Bobbi Stanley and her husband, Robert, have built an organization that is investing in their team and providing excellent patient care. While there are plenty of dental practices for patients to choose from in the area, Stanley Dentistry offers patients a unique experience that is hard to find anywhere else.

“We are a very comprehensive office,” Stanley said. “It’s rare when you have to leave our office for anything, because we have four doctors in our office and we all practice what we are passionate about. We can offer everything in dentistry.” Between the four practicing doctors at Stanley Dentistry, they cover all 10 dentistry disciplines.

This is a huge part of the value proposition for Stanley Dentistry. By offering everything that a patient would need, it saves the patient time and effort that would be spent setting up insurance and contact information for the patients and

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their families at different specialist offices. On top of all that, it gives Dr. Stanley's team an opportunity to build a relationship with patients to ensure that they feel cared for and appreciated.

After you have established that relationship of trust with your patients, it can be difficult to send them to a specialist for any of the procedures they might need. Dr. Stanley's approach to serving her patients ensures that they're able to visit her practice for all their dental needs. "Every dentist knows that if you don't do root canals in your office, and your patient needs a root canal, they are typically going to ask you to do it. Because they trust you. They want to stay where they are."

With only one location, Dr. Stanley's team can focus more on quality than quantity. At one point, they tried to open a second office in a smaller town, 25 miles away. The purpose of this office was to serve the underserved and help people who were restricted by insurance

and couldn't afford dentistry. Eventually, overhead costs forced her to reconsider what she valued about her organization: offering the best customer service and best dental care possible.

The second office was closed to maintain the integrity of the dentistry and the organization. From there, Dr. Stanley expanded the original location. "We just said we are going to help the underserved by helping the underserved. If they can't pay, they can't pay. It's fine. But there are people who desperately need dentistry, and we will give it away as we have to."

Stanley Dentistry has team leaders in each department, acting as a management role for each division of the team (i.e. admin team leader, hygiene team leader, assistant team leader, call center team leader). With this structure, any team members with questions or concerns can go to their designated team leader. From there, the team leaders can go to Dr. Stanley if needed.

Dr. Stanley says that dentistry as an industry does not focus enough on the business of dentistry or leadership. "Dentists went to school to help patients and be dentists. Many dentists don't even like being a businessperson, which is why office managers are a critical piece of the organization." She has organized her practice this way because she is truly passionate about the business side of dentistry.

"I'm not against having a CEO, whether it's your office manager or someone else. There definitely needs to be a leader. But I do believe that the dentist needs to be involved in the vision," Dr. Stanley explained.

### **Defining the culture from the top**

The company culture at Stanley Dentistry is very important to Dr. Stanley. "I believe in a culture where people love what they do, and they love doing it with people that they love doing it with." For her practice, Dr. Stanley decided to never just hire a "warm body" to fill a space. She hires people who are qualified for the role that she is looking to fill, not because they're an extra set of hands.

Even if she doesn't have an opening, she will hire the right people for her patients. Describing her hiring process, she says, "I've bumped into waitresses in a restaurant and asked them if they wanted a job just because I liked their personality and service that they were giving, and then we found a job for them."

In addition to finding the perfect fit for her organization, Dr. Stanley is looking for people who want to grow as well. "When we hire people, we



fill their assets out and we will move them into the position where we feel like their assets can really grow.”

Growth is a huge part of the Stanley Dentistry culture, so much so that Dr. Stanley encourages her team to pursue what they love to do. Even if that takes them away from Stanley Dentistry. “Several of my team members have gone on to create their own businesses or do things because they were passionate about it, and I believe in empowering people to do that,” she said.

Breaking down her average week, Dr. Stanley makes sure to have production days, planning days, and personal days. While she makes sure that she has a personal day each week, that is the hardest one to maintain consistently. “I love what I do. Sometimes I forget that I just need to chill out and have fun, because when you’re a business owner, your work is your pleasure.”

While many dentists have standard hobbies like reading, running, or playing sports, Dr. Stanley chose a hobby that allows her to literally pull away from the challenges of running a business: flying planes. “When I take my plane and I go up in the sky, you can’t reach me. When I’m flying, I am away from everything and it’s just me. It’s really nice.”

## Manifesting a vision

For something like Stanley Dentistry to work the way that it needs to, there needs to be a vision in place that will define and shape the direction of the organization. Dr. Stanley says, “I have a one-year plan, a three-year plan, a five-year plan, and a 10-year plan. I have it all mapped



out, but I have to constantly go back and look at it to make sure we are either on track or changing to where we want to be long term. But that doesn’t happen by accident. It takes a lot of planning time.”

In the ‘one-year plan’, the focus is largely on how many patients Dr. Stanley wants to come in. Everyone is focused on the same goal, checking in on progress once a month. The ‘three-year plan’ focuses on smaller objectives that her team can pivot to right now. “That may be something like ‘do I need another team member to get my 10-year goal, and where do I see that happening? Within the next three years, do I need to hire another associate?’” Dr. Stanley explained.

The ‘five-year plan’ is focused on the practice as a whole. Less about human talent working in the office, and more about the space itself. Updating equipment, investing in new tools, and adding things like an ortho wing in the office. Whether they are expanding the building itself or training staff on



new equipment, Dr. Stanley and her team strategize how to prioritize their finances and do extensive planning to ensure that everything goes as smoothly as possible.

Stanley reserves the ‘10-year plan’ for her Big Hairy Audacious Goals. These are the long-term, compelling ideas for where she can maneuver Stanley Dentistry next. “How can I just do the unthinkable? Where can I take this practice that I feel like I may never reach, I’m going to reach it?” ■

# Riding the Dental New Wave

How Gary Bird and SMC National are delivering a jolt of fresh energy to new patient marketing.

## Gary Bird loves to innovate.

The founder and CEO of dental marketing powerhouse SMC National, Gary leads a company that has doubled in size – twice – since the beginning of 2020, earning a place on the latest INC. 5000 list of fastest-growing companies and a long roster of happy clients. While Gary would be the first to attribute that success to the efforts of his team, a key element has been his willingness to try new things in an industry that even insiders will admit is sometimes behind the curve.

Take, for example, the company's subscription pricing model, under which clients pay SMC a single monthly subscription fee to bring new patients through their doors. More commonly associated with companies like Netflix, subscription pricing means an end to contracts – and can be adjusted to provide different tiers of service depending on each client's needs.



“If we build a service and a culture capable of producing great results, clients will want to stick around – no contracts necessary,” Gary says.

At SMC, those results flow from the rigorous use of data to drive new patient generation. While every marketing company incorporates data into their work, many are notorious for flooding their clients with reports detailing junk stats like page views, impressions, and click-through

rates that have little impact on a client's actual returns. However, the SMC team is zeroed-in on separating the signal from the noise – capturing and using only the numbers that lead directly to new patients.

As Gary puts it, “We are not an SEO company or a pay-per-click company. We are a new patient generation company.”

To make it easier for practice owners to understand exactly where their money is going and what their outcomes look like, the company has created its own app, which updates key metrics in real-time. Gary describes the app as a marketing dashboard where a client (and SMC) can identify, for example, how many calls placed to that client's front desk resulted in a new patient appointment. If the conversion rate falls below, say, 85 percent, SMC can step in to train that client's phone team on how to do better at turning calls into visits.

Likewise, practice owners can track their ROI – monitoring their monthly marketing budget against accurate new patient data – while SMC uses the app to regularly tweak each client's marketing campaigns and optimize performance based on current trends.

“We're hyper-focused on the relationship between marketing and business operations,” Gary notes. “We use data to alert us when marketing isn't working or if the operations side isn't converting the marketing opportunities they receive. Then, we know exactly how to make improvements.”

Gary sees a strong culture as equally essential as numbers, and sustaining that culture as a big piece of his job. The all-remote company thrives while operating across four time zones, hosts a Slack channel that often alternates between endearing shows of mutual appreciation and zany humor, and gives full-timers two Fridays off every month. Within the dental industry, SMC team members have a reputation for being both friendly and dedicated – which those inside the company say is also the case behind closed doors.

“We really go the extra mile to take care of our team, so they do the same for our clients,” Gary says. “We believe that's a winning recipe for all parties involved.” ■



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# Growing Your Practice to \$5 Million and Beyond

BY DR. WHITNEY D. WEINER



*“We cannot become what we want by remaining what we are.” – Max de Pree*

**Growth is hard. In our practices, I’ve found that once we approached the \$5 million mark, that’s when it became critically important to hire and reposition the right people and utilize the right processes to keep everything moving forward. Without a clear vision, scaling your practice will likely be more challenging with each passing day. I believe that through failure we learn our greatest lessons. In this spirit, I would like to share a little bit about my professional journey.**

I’m still a newbie in the world of practice ownership as I bought our first two general dental practices (while being seven months pregnant with boy No. 2) the summer of 2018. Prior to this, I operated in a

two-doctor, boutique private periodontal practice, working four and a half days a week. I hit the ground running before ever seeing my first patient at this office. I Google Mapped every general dentist

within 20 miles and visited 300 offices in the first four months to drop off goodie bags and introduce myself as the new specialist in town. This was humbling as it was a rarity I was even allowed to pass by the front desk and meet a doctor.

During my time at this office, I grew the company top line tremendously, built many relationships, and launched a successful study club. I was periodontist by day, mom and wife by night. I gave it all I had every day. I floated that world and had a partnership deal that did not work out, which turned out to be a huge blessing.

After my partnership deal fell apart, I took six months off (thanks

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to my supportive husband – love you Eliot!) to study the market – past and future trends – before deciding to build my own group dental practice. I used that time to gain a better understanding of what I wanted from a dental group practice, as well as what my patients would be looking for. I worked hard on my “why” as I knew that building and scaling a great company would take on a life of its own. Like many dentists, I don’t do things half ass, so if I was going to launch, I knew I would work harder than I ever had before. What I didn’t realize then was that growing this company built on a foundation of compassion – for the people we serve – would become such a part of me and such a source of pride in who I am and what I do. I believe with my whole heart that Whole Dental Wellness makes the lives of everyone we touch – our team, patients, and community – better.

### **Flexible with your vision**

To me, flexibility is a critical component of growth. I’ve found that without a healthy amount of flexibility in my decision making and planning, our practice would likely have nowhere to grow. It’s important for the vision of your company as well. Vision is one of those buzzwords that generates a lot of talk on various social media and leadership sites, but one of the greatest misconceptions about vision is that it must stay the same. Through experiencing it firsthand, I found the incredible value of being flexible with my vision.

People often ask me, “What is your exit strategy? How many

offices do you want to have?” My vision has always been more about “impact” than a number. I don’t know how big we want to scale. It will depend on what opportunities there are for us to expand our footprint without compromising our core values and commitment to the communities we already serve. I will continue to look to my team for guidance with this critical decision. For us, our current is building systems – allowing systems to run our company, not people – to maximize impact within our team, our patients, and our community.

**My plan was always to have in-house specialists, but I had to adjust my idea of the timing. Thankfully, I had some friends who helped us out when we needed it, and that setback ended up being a catalyst for our vision and growth.**

While we’ve maintained our focus on our impact, my vision has had to be rather fluid for when things change unexpectedly. For example, when I bought the two general dental offices in 2018, I merged them immediately. Within six months of this merger, one of the two general dentists had a heart attack just months after I had given birth to my second child. Naturally, that dentist triple produced over the other dentist, so our company was in danger. It was a challenging time, but because of the relationships I had built in our community, I was able to scramble and bring in specialists quickly to bridge the gap. Within months we went from being a two

doctor, general dentist office to having an in-house endodontist, periodontist, and oral surgeon.

My plan was always to have in-house specialists, but I had to adjust my idea of the timing. Thankfully, I had some friends who helped us out when we needed it, and that setback ended up being a catalyst for our vision and growth.

### **Building a customer base**

When it comes to building a customer base as a specialist within a general practice, I’ve found you may have to get creative. When I lived in

Australia, I was the first periodontist in my group practice. The vibe around the office was very much like “Oh, you can’t get external referrals. There is no way any dentist will refer to you when they know we have our own dentists here.”

Challenge accepted. I built a website and brand for myself (@thesmilesurgeon) and drove up and down the south coast of Sydney with my little branded macaroon bag, assuring other dental practices that if they sent their patients to us, we would not vortex them. I spoke of my character and how I believe in collaborative care, affording our patients the best quality work

available to them. I knew it would work in the United States because of what we built in Australia.

After two years of building up a customer base in Australia, we were getting about two days a week of external referrals (on top of what our in-house general dentists were feeding me). We found that operating an organization with a strong moral compass gave general dentists a way to see that we were not a threat to them. When we did have those harder conversations where patients did not want to go back to their general dentists, we would advocate for the dentist and talk about how wonderful they are. We always encouraged external referrals to stick with their general dentists, which helped to further cultivate that relationship with the dentists.

Let me be clear – the system isn't perfect. Some patients will refuse to return to their general dentist and that is a very sticky situation that – I'll be honest – hasn't always gone well for me. But in those moments, you too see the character of the dentists you work with. I have an anti-scarcity mentality. I believe our biggest hurdle in building or practices is getting patients to walk in our doors vs. shop at the mall or online. The dentist down the street or "rival periodontist" (this always makes me laugh now) isn't – and has never been – the threat. It is through empowering and educating our communities of the importance of oral health that we grow. Teaching people how oral health relates to whole body health. And that is the belief that Whole Dental Wellness was born on.

### Developing your culture

As I mentioned earlier, I structured what I am doing about my "why." I believe so strongly that we are creating a huge impact to the people we serve and on the home front. For me, that is my three boys and husband. I've done the grind. I've worked late nights, early mornings, and many Saturdays. I've worked five days a week while going out to meet referrals, lecture at local, national, and international meetings, and build study clubs. I wouldn't change any of that as it helped me grow and shaped my vision and goals moving forward. It built grit. But let's be honest, working like that is physically and emotionally draining. When I get home now, I feel rejuvenated, thankful, and grounded. That feeling is what continues to push me to keep working on my own leadership and scaling our company.

### Our model is very much focused on promoting from within breaking down that label of worth.

As we continue to acquire dental practices, part of my role is to go in, build up the team knowledge around the foundational importance of periodontal health, get the team going, make everyone super excited, and then backfill myself. While I may be working five to six days a month in the chair now (and keep cutting this back), I still put in about 50 hours+ a week doing other things.

Not being tied to the chair allows me to invest in my home life as well. I'm now able to schedule workouts

with my friends, get a massage, and drop my kids off at school – all things I longed for in my previous positions. I can work from home when my kids go to sleep and make them pancakes in the morning. I'm present in all parts of my life – not just my work. At the office, most days I feel like the rah-rah unicorn rainbow, cultural ambassador, keeping our team excited about what we do and the impact we create. They are a big part of that and it's my job to ensure they understand that without them, we cannot do the great work we do.

I'm spending more time these days investing in my team because I strongly believe that there is so much talent in the workforce that has not had the opportunity to shine and grow. People get labeled as "front desk" (a huge pet peeve of mine – people are not furniture!) or

"dental assistant," and valued based on what their hourly wage is – as if that defines them.

Our model is very much focused on promoting from within breaking down that label of worth. We've been promoting employees within our team and launching new divisions – such as centralized supply ordering, bringing RCM as a service in house, and launching our own insurance billing department within the last year. The heads of these divisions were team members who had been in

their previous roles for over a decade in offices we acquired. Through listening to their goals and wants we were able to not only allow them more autonomy and happiness in the workplace but also launch new departments within our company. A true win-win as we like to say.

I'm very inspired by Gary Vaynerchuck. One of the things he said that resonates with me is along the lines of "Know what you suck at and hire around it." I've done a lot of introspection on the qualities and abilities that I lack, and intentionally spend the time finding the people that excel in those areas. After hiring (or promoting) these people, I also work to help them understand that what they are doing is import-

ant. I want them to feel like a critical part of the team, because I would not get the job done without them. And that is reality. We are only as strong as our weakest link. We all have blind spots. A big part of our organization is stripping the ego out of all of it. We say that the team can let a doc-

tor go because we are all on the same playing field. We encourage our docs to use their first names (vs "Dr.") as we are all people with one common goal – to improve the quality of lives of the people we serve – our team, our patients, and our community – because they deserve it. ■



**Dr. Weiner** has received numerous accolades for her work as a surgeon, a researcher, and a lecturer, she is most proud of her role as a leader – in her practices, her home, and her community. She founded Whole Dental Wellness with the belief that true dental care must look beyond the mouth and embrace everyone as a whole. She believes in collaborate leadership and radical interdependence. Her optimism is

contagious as she is centered in a foundational belief that you only fall forward, and the best is yet to come. You may knock her down, but you will never knock her out.



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# Entertaining an Unsolicited Offer? It's like Bringing a Knife to a Gunfight

If you have a practice with over \$1 million of collections, or more than one location, it's a safe bet that you've been contacted by a buyer, and possibly received an unsolicited offer from them.

Buyers in our market love to connect with dentists and groups directly to help inform them of their EBITDA and value. Why wouldn't they? They get to control the story, the financials, and the process. The less you know, the better for them.

My only hope is that you didn't take that offer. Taking an offer from a buyer without running a competitive process is doing you and your estate a disservice. If you took that offer, you left money on the table and, worse, might have missed the opportunity to do a deal with a partner that would be a much better fit for the long run.

Working through an unsolicited offer from a Private Equity-backed DSO is the equivalent of bringing a knife to a gunfight. That nice business development person you are talking with (the one who is getting to know you and your spouse over plates of sizzling steaks and bottles of red wine while promising you rich returns on your equity) is not the only person on the team working



BY KEVIN CUMBUS,  
PRESIDENT OF TUSK  
PARTNERS

**There are over 100+ PE-backed groups in the U.S. today, and I would venture to guess that none of them would take an unsolicited offer.**

to buy your business. Behind them, there is a team of analysts, high-priced attorneys, brilliant CPAs, and Private Equity guys who are all wading through your numbers, helping the CEO pull together an offer that they hope you will accept. In deals where you are unrepresented, you are outgunned, outmanned, and will likely be outdone.

They start by asking for financial and operational information, and you think, what can it hurt to share? This opens the door, and they ask for more and more and then set up calls to clarify some items that they have discovered. All the while, they're gaining more clarity into your business.

Do you think that a Private Equity group that owns a DSO will sell to the first group that provides them an offer? No. There are over 100+ PE-backed groups in the U.S. today, and I would venture to guess that none of them would take an unsolicited offer. Why? They know how the game is played – they made the rules. They know that the only way to maximize the value of their investment is to go through a marketed process. Even PEGs want an M&A Advisor / Investment Banker to help them prepare their business for sale and drive a competitive process. Competition and deal tension drive up value.

Private Equity Groups understand that they need to prepare to sell to maximize their value. When they submit unsolicited offers, they know you are not prepared and look to take advantage of that. It is how the game is played. If you are going to play the game, know the rules – get an M&A Advisor and win the game. ■

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# Structuring for Success

When it comes to growth and expansion, you need a well-defined team. BY JOSEY SEWELL



**Entrepreneurs have been changing our world for as long as we can remember.** As you grow your business, whether you are acquiring practices or building them, the composition of your leadership team is key. When it comes to growth and expansion, there are three things needed to propel your organization to success: someone to dream big, someone to make a plan, and a well-organized team to make it happen.

## The Visionary

It all starts with a Visionary.

Visionaries, as the name suggests, can see that the world needs something that isn't there and feel a calling to be the one who creates it. Visionaries are the "big-idea" people who are constantly coming up with

new and innovative ideas. They're charismatic people who inspire others to follow them and help make that vision real. What I love about Visionaries is that they don't just believe that the impossible can be done, but they believe that it must be done.

Visionaries typically have a good pulse on the industry, and are great with communication and negotiation, which is why they're often the founding entrepreneurs of organizations. It is a truly incredible skillset and integral to the successful growth of any group.

However, these incredible strengths and talents come with challenges that are specific to Visionaries. Visionary entrepreneurs don't see problems, they see solutions. But that same ability to see the big picture creates some blind spots that they might not be aware





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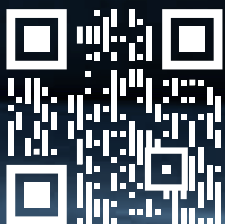
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they have. This can give them an unrealistic sense of optimism, which I call “Visionary delusion.” They are quick to latch on to big ideas and have a hard time letting go of their “great” idea once they’ve had it.

### **The Operator**

Visionaries think outside of the box. They don’t like to live by the rules and can become really resistant to following standardized processes ... even when it’s a process they created. They can also struggle with the day-to-day minutia. Their drive to chase each new idea makes them inconsistent and not great at developing people or managing them.

Which is why any successful Visionary needs their counterpart – they need an Operator.

## **Every company needs a Visionary and an Operator who are the main decision makers for the organization.**

The Operator is a forward-thinking problem solver who has the unique ability to harmoniously integrate the major functions of the business, run the organization, and manage the day-to-day issues that arise. An Operator is the glue that holds the people, processes, systems, priorities, and strategy of the company together. The Operator is someone who is adept at self-management, decisive, good at planning and organizing, resilient, and a strong manager who catalyzes the team.

The Operator faces a unique set of challenges. The job is thankless. The Operator’s role is to be the stick

in the mud, to be the hole-poker. They’re there to bring the Visionary back down to earth. This can create a lot of friction and tension. Ultimately, their value to the organization comes from doing the hard job of telling the Visionary “No,” and holding the Visionary accountable.

The conflict between a Visionary and an Operator is important because it energizes creative freedom. When that conflict is healthy conflict, it drives innovation and gives rise to our best ideas.

Visionary and Operator – one sees the future, the other makes it happen. The Visionary is the “Why” person. The Operator is the “How” person. And the best Visionaries and the best Operators have a bit of each one inside of them.

### **The Accountability Network**

Every organization needs to have a clear structure in order to function well. The owners and investors choose a Visionary to guide the business. The Visionary should then choose their own Operator. Together, the Visionary and the Operator form the head of the organization. Neither is higher than the other – they are accountable to each other.

Every company needs a Visionary and an Operator who are the main decision makers for the organization. But the command-and-control style of leadership is out. You know what else is out? An

organizational hierarchy. You’ve got to flatten that hierarchy to create an accountability network.

The best way to do this is to create an organization chart – a living, breathing document that is shared with your organization so that everyone knows who to come to. You can’t build the organization chart with the idea that you must have a seat for everyone currently on your team. The ideal structure you would design may be vastly different from the reality of what you’re facing. What got you here will not necessarily get you where you need to go.

The leadership roles will be unique to each organization based on its own needs, so the first step in creating the chart is to define the rest of the major departments in the organization and the leadership roles needed for them. Build the seats first, assigning people to them comes later.

As you make the seats, list the metrics that each role is responsible for. This will determine who within the organization reports to that person. Simplify this as much as you can – three to five simple concepts are enough.

Only when you have built the structure and the seat are you going to put a person in it. As you start to fill these roles, remember that only individuals can be held accountable – a group of people can not. It’s OK for one person to fill multiple roles, but to maintain accountability, a single role can never be done by more than one person.

After you finally have all the right people in the right roles, all that’s left to do is to get out and change the world. ■

# Redesigning the Fundamental Chassis of Dental Operations for a New Workforce

The pandemic forced a hard reset for how dental practices operate. Many businesses have the desire to take on the pent-up demand, but most are hindered by an ongoing challenge that plagued the industry even prior to COVID – the ability to find and retain team members.



BY CHRISTINE SISON,  
CEO OF SWISS MONKEY

As businesses continue to look for new ways to meet their staffing and operational needs, they should look at their existing solutions and actively assess what assumptions are no longer valid, how staffing and recruitment have changed with the pandemic and when a refinement or pivot is necessary to operate effectively in this new environment. The pandemic's impact on the workforce was significant and accelerated macrorends already underway and include:

- › **New workforce generation:** The societal expectations of Millennials and Generation Z are forcing many employers to rethink their hiring and management approach. This “new” generation of workers demand an alignment between personal values and business values, as well as greater expectations regarding pay.
- › **The Great Resignation:** With roughly half of the working population sharing they are likely to look for new jobs within a year and about one-third saying they would leave their job without having a new one in place, this new market is challenging even the most seasoned managers. Employers must create more holistic employee packages that speaks to their non-financial needs.
- › **Rise in Gig and Remote Workers:** The pandemic also accelerated the rise in gig and contingent workers. These are individuals who have opted out of the traditional employer-employee contract and looking for greater autonomy with their schedule, pay and work-life balance.

What does this all mean? Below are some considerations and practical tips for operating in this post-pandemic era.

## **No. 1. Find Alignment between Business and Employee Values.**

While there is no one size fits all approach, employers that create the space, time, and resources to find alignment with their employees' personal mission experience less turnover and more engagement.

## **No. 2. Change the Narrative and Create a More Humanistic Approach to Workflow Changes.**

While many practices already have some level of a hybrid model in place, the success and effectiveness of those partnerships vary. While the status quo of using traditional verbiage like “outsourcing” may seem benign, this traditional vernacular of using a third-party denotes a certain level of transactional nature around the model. Using terms like a “hybrid model” and “off-site team” can help with the uneasiness some may have.

## **No. 3. Evolve and Expand the Hybrid Model.**

In addition, organizations may want to consider looking at creating greater operational redundancies to minimize disruptions in staffing and to allow for their management teams to focus on growth efforts. Continuity of workforce is a real competitive advantage. Practices with chronic staffing turnover see a significant impediment to their growth and the care they are able to provide to their patients. As staffing continues to be a challenge, organizations instead should shift focus to a continuity of work execution as a new paradigm for their operations. As niche operational companies grow within the industry, organizations can embrace this change and shift a greater proportion of their operations to third parties versus allocate internal resources. This is a mindset shift from labor planning to work planning. Benefits include minimizing staffing disruptions, capitalizing on their specialization and thus efficiency, costs savings, and the reallocation of internal resources to growth and strategic objectives. ■

# Set Goals, Track Performance, and Streamline Processes

BY SANDY ODLE, CO-FOUNDER AND CXO OF eASSIST DENTAL SOLUTIONS

**As a dental practice owner, you want to** know where your practice stands at all times, based on facts. Data lets you understand how your practice is actually performing instead of how you hope it is. Your Practice Management Software (PMS), and perhaps other financial software you use, are rife with data and reports you should be leveraging to help set achievable goals and track performance.

Practice owners who look exclusively at gross production often don't understand how they can be making so much money, and yet be under constant financial stress because they never seem to have enough. In reality, gross production tells you what the practice has the potential to earn for all the products and services rendered, but not what has actually been collected for those services after deducting all expenses. To know and improve upon what you're actually making (aka net profit), monitor and manage performance in these four key areas:

## **No. 1. Patient retention & acquisition**

You should always be working to fill your chairs with new patients and referrals, but your existing patients provide your best and fastest opportunities to increase the number of visits. The ideal patient retention rate is 85%, which is far above the average patient retention rate of 41%.

## **No. 2. Production per patient visit**

Increase your profitability in this area by improving on everyone's ability to make effective treatment plan presentations and making the most of the patient's time when they are in your practice.

## **No. 3. Set collection ratio benchmarks**

Use collection and A/R reports to track performance against two key goals. Know where your office stands now, regardless of industry stats. If necessary, set goals for continuous improvement as you work toward the ideal result.

- > **Zero dollars past 30 days for insurance receivables.** You can quickly get closer to this goal by switching to EFT payments from insurance companies so you get the money faster; working your aging report almost daily, and being assertive with insurance representatives so you get 100% of what your practice is owed.
- > **98-100% collection ratio.** Know how much of your gross revenue should be collectible and how much of that you actually collect, on average. Start with a goal that's attainable. Achieve it, then set a higher one. Your best tool is your A/R report, and your best strategies are to submit accurate and complete insurance claims daily, and consistently and assertively follow up on outstanding claims.

## **No. 4. Dental practice overhead**

Large or small, multi-location or single-office, you should be maintaining a complete and accurate Profit & Loss (P&L) statement. Your P&L tells you where you stand on all the elements of the business that you need to be monitoring and controlling to ensure profitability, especially overhead costs. Break out overhead into numerous categories specific to a dental practice so you can be proactive about addressing anomalies and negative trends, finding ways to reduce costs (without adversely impacting patient care and service), and optimizing total overhead percentage.

## **Streamline the processes that drive your dental practice revenue**

The more eyes on your revenue cycle, the quicker you will catch roadblocks and errors. Streamlining processes to remote team members alleviates the tedious tasks from your in-office team, and keeps cash flow consistent no matter what. Streamlining these processes is important whether you accept the assignment of benefits for twenty insurances or none at all. But who can you trust with these processes? At eAssist, we fight for all that is rightfully owed to you while you and your staff focus on serving your patients. ■



**Sandy Odle** is the co-founder and CXO of eAssist Dental Solutions, the nation's leading platform for outsourced dental billing, patient billing, insurance verification, and more. Sandy partnered with Dr. James Anderson 11 years ago, and now they work every day to provide dentists across the country with the peace of mind that they deserve.

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# Bridging the Care Gap

Oral health and primary care integration can improve community health and disease management. BY DANIEL BEAIRD



**Westwind Integrated Health has been practicing medical and dental integration since 2017.** The mission of this Phoenix-based doctor-owned, multispecialty practice is to treat patients through a big picture lens with a focus on overall wellness to help patients become the healthiest version of themselves.

“We empower patients through knowledge to change their behavior,” said Dr. Maryam Beyramian, founder and CEO of Westwind Integrated Health, who has been practicing dentistry for 20 years. “Once you educate patients about their care gaps and what their health could look like in the future, you help them believe in their healthiest version.”

Medical and dental care have long operated parallel to each other, rather than in conjunction. Evidence is mounting to the flaws in quality for patients participating in separate

healthcare systems. For example, 55 million Americans don't receive outpatient medical care, but a quarter



Dr. Maryam Beyramian

of those Americans actually see their dentist. Providing primary care services to those patients could improve population health and chronic disease management.

“Our goal is to improve our patients' quality of life through prevention of disease,” Dr. Beyramian said. “Chairside screenings close care gaps – we know this. The collaboration between our primary care physicians, dentists, oral surgeons and orthodontists has changed people's lives.”

Westwind Integrated Health has diagnosed patients with hypertension who were overweight and at risk for diabetes, along with sleep disorders, in hopes of changing the course of their patients' lives. Patients with facial pain have been treated for TMJ and corrected a sleep disorder with a sleep specialist and a neurologist.

“We have thousands of these stories, and we can fill the care gaps,” Dr. Beyramian explained. “Children with behavioral health issues who had breathing disorders that were originally overlooked and contributed to behavior problems have been treated. We make a difference in these patients’ lives, whether it’s diabetes, cancer, GI disorders, cardiovascular disease or stroke, medical and dental integration is absolutely necessary.”

Westwind began with wellness.

“We wanted to make sure our clinical goals were clear on the outcomes we were seeking,” Dr. Beyramian added. “Our complete focus on integration was to reduce inflammation. We all know inflammation is the root cause of chronic disease, and we’re able to control inflammation through our perio doctors and primary care physicians.”

Westwind’s second focus was to improve outcomes through early prevention and diagnosis via chairside screenings. This improves patient compliance. “We wanted to create a new habit of self-care for them and wanted them to understand it’s just as important to get physicals at it is to get oral hygiene exams,” Dr. Beyramian emphasized.

Dr. Beyramian said many patients don’t know there are solutions to their problems, and they accept their health issues as part of life. But Westwind can help them through an integrated experience they’ve never had before. “When they believe that you’re not a retail facility, they stop shopping around and they start listening to you. They trust you,” she said.

Patients often get “lost” in the medical system due to lack of

collaboration between medicine and dentistry. And patients can disappear from the dental chair when they’re diagnosed with something like cancer. “No one tells patients to keep their oral hygiene appointments during these times and those patients can be lost. We need our medical community to help us, and we need to be vocal about it,” Dr. Beyramian said.

Westwind’s dentists and physicians work together in its clinical department. “Our culture has an equal mindset. We have monthly meetings where physicians present topics to educate us on different facets of medicine. Our team members then share that education with our patients.”

**“We make a difference in these patients’ lives, whether it’s diabetes, cancer, GI disorders, cardiovascular disease or stroke, medical and dental integration is absolutely necessary.”**

– Dr. Maryam Beyramian

With 20 multispecialty doctors on staff, Westwind’s team focuses on providing whole-body health to their patients. “Our bodies aren’t divided into pieces. We are one body, and we need to work together to become healthier as a community,” she said.

Integrated health is resonating with a patient base that is hard to find – between the ages of 20 and 40 years old. Forty percent of Westwind’s patients fall in that age range. “That’s the black hole of patients,” Dr. Beyramian said. “Nobody 30 years old sees a physician until something is wrong with them.” But Westwind’s younger

patients are drawn to its whole-body healthcare experience.

“We asked our patients how many would prefer an integrated clinic and 93% of them said they were interested, while 87% said they preferred it,” Dr. Beyramian added. “78% of them said they would spend up to two hours in the office and many more of them said they would spend as long as it takes. We have the relationships within our medical community that drive those patient behaviors.”

Dr. Beyramian emphasizes that Westwind doesn’t have a special patient population. They see the same types of patients that other

dental practices see. Their patient breakdown is half male and half female. They have 11 locations in the Phoenix Valley area that serve different patient populations, including pediatric, young adult, geriatric and lower income patients.

“My practice looks like your practice,” Dr. Beyramian said. “But we wanted a vision for the future of our DSO group. Our goal is for our patients to have less hospital visits, less ER visits and less money spent on unnecessary things. Dentists should be integrated into primary care. We’re the first line of defense for our patients.” ■

# How to Address Gender Inequity Within Dentistry

Investing in women employees is the best way to grow your business.

**The dental industry has made great strides in addressing gender imbalance:** women now graduate in equal numbers from dental school. But women remain underrepresented when it comes to leading our industry. Today, women make up 95% of hygienists, but less than a third of dentists.

Research shows that gender diversity increases innovation and productivity. Hiring women in leadership roles will ultimately drive up the bottom line and prepare your organization for long-term growth and success. At, tab32, we're doing just that: today, 60% of our top leaders are women.

How did tab32 build a women-led team? The answer is simple: we've invested in women, taken risks, and shown women they're valued. Here's what that means in practice:

## 1. Hire women leaders.

With industry-wide extreme staffing shortages, we have an opportunity to attract new talent. Bringing women into senior roles requires existing leaders to step up: create diverse hiring committees, and prove your commitment to equity with conscious hiring, competitive compensation, and promotion policies.

## 2. Use tech to drive retention.

Women often take thankless frontline jobs when they start

out. Replacing tired tech with more effective digital tools can eliminate friction and boost retention. Cloud solutions that enable remote working can also help women to balance domestic obligations and deliver value for your organization.

## 3. Help women grow.

Don't let women be held back by low expectations. Give all your workers opportunities to think creatively, strengthen patient relationships, and boost revenues. The more you treat employees as knowledge workers, and not mere paper-pushers, the more they'll flourish.

## 4. Network like crazy.

If you're a woman, make it your personal mission to forge connections with other women. If you're junior, they will lift you up; if you're more senior, you can offer mentorship. Either way, we all benefit. Men aren't off the hook, either: it's your job to advocate in rooms that women aren't in, and to invite female colleagues

to network alongside you to foster long lasting success.

## 5. Let women lead.

To cultivate women leaders, remember that your best future leaders might be in roles you don't think of as "leadership track." It's up to you to unlock their potential. Help employees set KPIs and tangible career metrics in order to cultivate leadership momentum.

Ginger Rogers did everything Fred Astaire did — backwards, in heels. Similarly, women who overcome challenges to rise to the top of the dental industry are major assets to employers: whip-smart, tough, and full of energy.

At tab32, we know supporting women is about making our business the best it can be. Half our patients are women, and we need female perspectives to meet their needs. If you aren't helping women to lead, you're wasting human capital, and holding back your business.

In fact, tab32 has become a talent-magnet as word of our diversity has spread, and we often hear from women seeking new opportunities. The bottom line: to retain great employees, or draw industry-leading talent to your organization, it pays to invest in women. ■



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Dr. Aman Kaur



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# Women in DSO®

The organization's inaugural event lays the foundation for success.

**There are many more women leading dentistry today than 10 years ago.** The ADA's Health Policy Institute (HPI) shows the percentage of dental school graduates who are women grew from 46% to 50.6% between 2009 and 2019. Plus, the percentage of dentists in the workforce who are women grew from 24.1% to 34.5% between 2010 and 2020. And that's just at leadership levels. "Women have been doing the lion's share of the work in dentistry and DSOs when all levels of the workforce are included," said Dr. Aman Kaur, a seasoned executive, DSO industry veteran and Founder of Women in DSO®.

Women in DSO® is an organization created to empower and advance women in the DSO space and grow future women leaders of the industry. Its inaugural event, Empower and Grow 2022, was held in March at the Aria Resort & Casino in Las Vegas.

"The phrase I keep hearing is 'it's about time,'" Dr. Kaur said. "We believe there's an abundance of sunshine for everyone and when women are rising, it elevates the industry."

She's been pleased by the support and response from the DSO industry. It's been primarily a volunteer-based organization since its creation. Focused on the core values:

- › Courageous.
- › Compassionate.
- › Committed.
- › Change Ready.

Women in DSO serves as a platform to advance and promote women leaders across the DSO space. Leaders currently in leading, managing, directing, supporting and

developing the industry's most progressive and high-performing dental practice groups.

"We want support from current leaders, both women and men," Dr. Kaur said. "We have received tremendous support from many organizations. While the number of women in the dental industry is growing, it is about time we also see women representing the industry in leadership roles."

Dr. Kaur wants organizations and associations in the DSO industry to lean on Women in DSO for highlighting women who can share their experiences about best practices, for example, at their events. Some of the largest and most prominent companies in the industry have shown support for Women in DSO and you can learn more about them on [www.womeindso.org](http://www.womeindso.org).

"These companies are behind our mission, not just our organization," Dr. Kaur said. "Our purpose is promoting and advancing women in leadership roles. This an important mission given that the majority of our workforce are women."

She wants to make sure that mission doesn't diminish. "Women were negatively impacted by the pandemic at a greater rate than men, resulting in them leaving the workforce. My worry is that often catastrophes affect women in the workforce more than men. So, we need to stay at it. This is why we need this organization. This isn't like any other dental professional association, and it needs the industry support. We are listening carefully to suggestions and recommendations because this work can evaporate if we don't stay at it," she said.

## Inaugural event

Dr. Kaur is overjoyed and humbled to have a sold out inaugural event, Empower and Grow 2022. This event gave attendees unparalleled content delivered by some of the best leaders in the industry who have been in the DSO space for years in many different roles. And they happen to be women! The Women in DSO. In addition to great content, attendees had access to the Empower Lounge where they received professional headshots; style and branding coaching; and much more.

Dr. Kaur knows that seeing is believing. We need to see women achieving their dreams. The agenda for Empower and Grow spotlighted these inspiring stories: Drs. Amira Ogunleye and Wardha Inam.

Dr. Amira Ogunleye was a featured speaker and is the spokesperson for SmileDirectClub and an award-winning cosmetic dentist. She is the co-owner of Beautiful Smiles in South Florida and a dentist to celebrities such as Gabrielle Union, Michelle Williams, LeBron James and Dwayne Wade. Dr. Ogunleye is an Egyptian immigrant and Howard University College of Dentistry graduate. She's a wife and mother of two who is committed to lifting others as she climbs in the industry.

"It's a powerhouse of leaders in the industry – not just women leaders. But we're highlighting women's stories," Dr. Kaur said.

Bonnie St. John was the keynote speaker. Despite having her right leg amputated at age five, St. John became the first African-American ever to win medals in Winter Olympic competition, taking home a silver and two bronze medals at the 1984 Winter Paralympics in Austria. She graduated with honors from Harvard, won a Rhodes Scholarship,

earned numerous sales awards at IBM and was appointed by President Bill Clinton as a director of the White House National Economic Council.

"She knows how to overcome an obstacle and thrive. She is very impressive. It gave me goosebumps while I was speaking to her," Dr. Kaur said. Women in DSO wants to highlight and learn from women in other industries, bringing them in to help in mentorship programs and exposing them to the DSO industry can add more leaders to the DSO industry.

emPower Networking is Women in DSO's monthly virtual networking track. It began in January with Margaret McGuckin, co-founder of I3 Ignite, and Jodi Evans, founder of Revolutionary Tribes, leading a powerful member discussion on how to drive and manage executive and investor communication.

In addition to emPower Networking, Women in DSO holds a monthly virtual Exchange Circle where members exchange ideas and insights about best practices. These 45-minute live, online sessions begin with a topic presented briefly by an expert, followed by a 10-minute Q&A and an open dialogue amongst participants. The topics covered have included talks about different dental software, operational leadership, budgeting processes, annual bonuses and procurement/vendor partnerships.

Dr. Kaur said she is excited about launching the job board for members later this year that will be different from traditional job boards. It will feature companies known for empowering and supporting women, and it will profile various women leaders and how they have navigated



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their careers, including access to their bios. “Traditionally women enter dentistry in positions at dental offices, we want to raise awareness about entering this industry in roles outside of dental offices, for example in marketing, training, and even c-suite positions.”

### **Seeing is believing**

“There are many women doing great things for the industry already; however, we do not always see them representing their work and organizations at conferences or other venues,” Dr. Kaur said. “Recently we are seeing some women present at industry conferences, but it continues to feel like an afterthought. We need intentional representation of the great work that women are doing so that other women can see this and realize what is possible and can achieve similar heights.”

Since Women in DSO’s launch in last July, there have been several WinDSO panels highlighting women leaders including at Dykema’s Definitive Conference for DSOs. The WinDSO launch event was a special educational networking event to connect, exchange and inspire. Henry Schein sponsored it. There was also a panel at the Sunset Technologies Conference and a third panel at the DEO Fall Summit last year.

WinDSO panels are again scheduled this year at the ADSO Summit in March and April, the DEO Dental Group Growth Summit in June and the Dykema DSO Conference in July. “DSOs are the future of the dental industry,” Dr. Kaur said. “Our mentorship and internship programs as well as our speakers’ bureau will all

launch after our inaugural event in Las Vegas in March. This will help us further expand our pool of women leaders, empowering them to represent their organizations and their work.”

Dr. Kaur said nobody should ever feel stuck in their career. “This is for everyone,” she said. “A time comes when you need a new challenge or are no longer to work chairside, but you’re still a clinician. You still have so much to offer and can provide great service to the industry. That’s where being in DSOs and working with industry partners is so helpful.”



Many DSOs have joined Women in DSO and appointed one woman from their organizations to serve on the advisory board. “We have over 30 people on our advisory board and we’re working on different committees based on the needs identified by our members,” Dr. Kaur said.

DSOs that become members get company level benefits and can post their positions and highlight their happenings that support the mission of Women in DSO. They have access to the WinDSO’s membership benefits and can place up to 15 individuals in their company as members of the organization.

“We need senior women leaders to mentor, inspire and create a strong network of women leaders for now and the future,” Dr. Kaur said. Individual membership includes many of the same benefits as DSO group membership, gaining access to the WinDSO platform to share experiences and knowledge with like-minded peers across the DSO industry. ■

## **DSO Group Membership Benefits**

- ▶ Discounted admission to #WinDSO Annual Summit
- ▶ Leadership and Industry Development
- ▶ emPower Networking with Like-Minded DSOs
- ▶ Platform for Women Leadership and EO Implementation
- ▶ Career Page and Job Board for Recruitment
- ▶ DSO Industry Mindshare and Announcements
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# Meet the WinDSO Board

## **Dr. Aman Kaur:** Founder and President of WinDSO

**Dr. Aman Kaur is the Founder** and President of WinDSO. As a trained dentist and with extensive financial and business experience, Dr. Kaur has been very involved in the growth of the DSO industry. Dr. Kaur continually works with the VC and PE groups as an operating member and consultant for their DSO portfolios. Dr. Kaur has worked with multiple DSOs over her career in various executive roles and is very involved with Dental Vendors, DSOs, Not for profit and state Dental Associations developing business solutions along with help-



ing emerging dental organizations to build development and growth strategies. Dr. Kaur's vast dental industry knowledge and love for developing leadership teams throughout her career has given some great women business leaders to the DSO industry, especially through her partnership and mentoring relationships.

Respected as a credible voice in industry for her leadership, business decision-making, finding strategic solutions and building partnerships and alliances Dr. Kaur is constantly shaping the industry.

## **Susan Greenspon-Rammelt:** Chief Legal Officer Counsel, EVP of Business Strategy and Corporate Secretary of SmileDirectClub



Susan Greenspon-Rammelt is Chief Legal Officer Counsel, EVP of Business Strategy and Corporate Secretary of SmileDirectClub, the global oral care company and creator of the first medtech platform for teeth straightening. Susan Greenspon-Rammelt has served as SmileDirectClub's Chief Legal Officer since April 2018, Secretary since March 2019, and as a member of SmileDirectClub's board since August 2019. She has also served as General Counsel of Camelot since April 2018.

Prior to joining SmileDirectClub, she was a corporate law partner at Foley & Lardner LLP since 2017, where she represented domestic and international enterprises. Prior to that, Susan was a partner at Dentons US LLP. Susan Greenspon-Rammelt has over 30 years of experience as a corporate attorney, focusing on mergers and acquisitions, financings, restructurings, corporate governance, and general corporate counseling, particularly in the retail and beauty industries.

Prior to joining SmileDirectClub, she was a corporate law partner at Foley & Lardner LLP since 2017, where she represented domestic and international enterprises. Prior to that, Susan was a partner at Dentons US LLP. Susan Greenspon-Rammelt has over 30 years of experience as a corporate attorney, focusing on mergers and acquisitions, financings, restructurings, corporate governance, and general corporate counseling, particularly in the retail and beauty industries.

### **Q: What got you excited about WinDSO?**

**A:** Having been in traditionally male dominated industries for my entire professional life, I have always understood the importance of organizations and leaders willing to encourage and promote the ability of women to become powerful leaders within those industries. There was not such organization in the DSO space until WinDSO and the opportunity to help shape that organization so as to maximize what WinDSO can do to encourage and promote women leaders in the DSO industry is exciting and important to me.

### **Q: What are you looking forward to accomplishing as a board member?**

**A:** I am looking forward to creating legitimate networking opportunities for women in the DSO industry so they can use those networks to achieve faster and better growth. I also am looking forward to our mentoring programs. With a shortage of female leaders in the DSO and dental industries, I think providing the younger women in this industry with the benefit of mentoring is extremely important for their growth and success.



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## Amy Mendoza Leonor: Head of Marketing for Vyne Dental®



Founding Women in DSO Board Member and Head of Marketing for Vyne Dental®, Amy is a savvy leader in brand development and strategic marketing. With 20+ years in strategic marketing of industries to include private education,

real estate, advertising, culinary, design, tech, practice management, and now dental, she has effectively led branding strategy, implementation, and results-driven campaigns for 20+ dental business units, brand strategies for Breakaway Practice, Dental Whale, and 500+ dental practices and DSO groups across the US.

Amy's career spans leadership of teams rooted in design, strategy, and omnichannel marketing. She is a committed leader in both digital and print marketing strategy with a keen focus on the organization's P&L and growth development. Currently, she oversees corporate marketing, brand, and strategic development for Vyne Dental® and its portfolio of practice management technology solutions as well as marketing strategy of private dentists and DSO groups nationwide.

### **Q: What got you excited about WinDSO?**

**A:** As a board member, I am hoping to effectively drive awareness around the mission of WinDSO which is to grow and advance women across the industry. I am excited about the core values of Women in DSO. Additionally, it is my goal to further develop a global brand for not only the organization but for the leading professionals in our industry who are making great strides in their positions and organizations.

### **Q: What are you looking forward to accomplishing as a board member?**

**A:** The Women in DSO vision is groundbreaking, and I'm excited to be a part of it. The idea of not only empowering leaders that are already currently driving change in the most successful organizations in our industry, but developing the space and platform to mentor and support the future women leaders so that the industry as a whole is more diverse and rich in collaboration means we are improving and advancing the profession and DSO space as a whole, and it's an important movement to be a part of.

## Kathleen Titus: Henry Schein Director of Business Development, Strategic Accounts



Kathleen Titus, Henry Schein Director of Business Development, Strategic Accounts, has been both pioneer and significant contributor to the DSO industry since 1994. She has been advocating the landscape of our industry and our unique market

segments through a visionary lens. In 2014, recognizing the market landscape was trending ever more rapidly toward private practice aggregation, Kathleen helped to launch Henry Schein's Mid-Market specialty team, creating and bringing critical resources to aspiring group practices. One of her proudest accomplishments is her part in the creation of Henry Schein's DSO Education Forum.

It was Kathleen's vision to bring stakeholders together to share best practices, learn, and network. Her deep understanding of the industry was key to assuring content was relevant, topical, and valuable for the attendees,

and ensured that the industry (and Henry Schein) maintained a crucial forum for the cultivation of, and access to, what would become the fastest growth segment in dental. Whether you're a colleague, customer, vendor partner or industry expert, Kathleen believes in the power of collaboration for the betterment of business and, ultimately, providers and their patients.

### **Q: What got you excited about WinDSO?**

**A:** There have been a number of very legitimate organizations that showcase women in dentistry. I love dentistry, and I love the countless contributions women make. I've spent 20 years in the DSO space so when I heard the words, "Women in DSO", it stopped me in my tracks. Sometimes you just know and that was my reaction; I knew this wasn't just a great idea. WinDSO is the right idea at the right time in history. When you see women light up talking about WinDSO's vision and mission,

when people are seeking you out to learn about the organization, when the industry responds with overwhelming and enthusiastic support, it's simply undeniable. Finally, when I learned who would be involved, I knew this was going to be big. Am I excited? You bet I'm excited!

**Q: What are you looking forward to accomplishing as a board member?**

**A:** Leaving my mark on an industry that has given me wings is a dream come true. The dental industry has

provided me a big beautiful blank canvas to paint a career that has lasted more than 3 decades. Along the way, I have been buoyed up by more experts, mentors and champions than I can count. WinDSO gives me a chance to pay back. As the word "founding" implies, it's an opportunity to establish a special community that draws strength from each other and shares critical resources to empower women. As a WinDSO board member, I want to help create a sustainable organization that continues to pay it forward to future generations of women leaders in DSO.

**Brian Colao: Director of Dykema's Dental Service Organizations Industry Group**



Brian Colao is the Director of Dykema's Dental Service Organizations Industry Group. Brian has been in the dental space for over 25 years.

He is widely regarded as one of the foremost authorities in the United States on DSO formation, DSO business structures, DSO-related mergers and acquisitions, and regulatory compliance for DSOs including the corporate practice of dentistry, illegal fee splitting, advertising regulations, laboratory regulations, patient finance regulations, billing regulations, HIPAA regulations, credentialing, permit and licensure regulations, marketing regulations, and labor law regulations affecting dental practices.

**Q: What got you excited about WinDSO?**

**A:** The opportunity to work with a powerhouse board of directors that I've been friends with and have partnered with throughout the years. The ability to make a meaningful difference in the DSO industry by working for an organization whose mission is to provide access, opportunities and mentorship to the many talented women in the industry.

**Q: What are you looking forward to accomplishing as a board member?**

**A:** Making the DSO industry a better place. All of our organizations are more profitable, more effective and better places when women are fairly represented.

**Kathleen Noll: Managing Director and Vice President of Dental Solutions**



From pioneer to revolutionary – Kathleen Noll, Managing Director and Vice President of Dental Solutions joined NextGen Healthcare in 1988. For more than 40 years, NextGen Healthcare (formerly Quality Systems, Inc. or QSI) has been a leading provider

of healthcare software and service solutions dedicated to empowering the transformation of ambulatory care.

Throughout her career, Kathleen has remained passionate and committed to providing education and enabling dentists and dental organizations in the use of technology-based solutions to automate complex, mission-critical processes. Well-respected in the industry and recognized for her long-term commitment of partnering with dental

group practices and dental service organizations (DSO) to support their transformation of dental care through the use of technology to ensure that these organizations can increase productivity, reduce risk, minimize costs and improve the patient experience. Kathleen is the former Chair of the NDEDIC Board of Trustees, Strategic Planning and Uniting the Industry Committees and is a past Benjamin D. Ward award recipient. Kathleen has developed and presented educational programs on the benefits and effective use of computer technologies for clinical and business administration for dental organizations.

**Q: What got you excited about WinDSO?**

**A:** When Dr. Aman and I first discussed her vision for creating an association focused on preparing women to

succeed in the DSO industry, I was instantly engaged. Providing an environment for networking, education and mentoring of women leaders, while enabling more women to advance their careers was very exciting and long overdue.

My experiences with the DSO industry as an Industry Partner vendor dates back more than 35 years, to a time when the DSO concept and industry was first emerging. During my 33 years with QSIDental (Next-Gen Healthcare) I and my teams had the opportunity to engage with and support many of the largest DSOs in the country. Historically, the leadership teams of the DSOs have not reflected the typical workforce within the organizations where most of the frontline workers were/are women. With the vast experience of the WinDSO membership, the association is uniquely

positioned to encourage the evolution of the DSO leadership teams.

Having recently retired from a senior leadership position in a healthcare software company (which had historically had a mostly male leadership team), I felt that I could offer insight and mentoring for women who wanted to grow and enhance their careers within the DSO industry.

**Q: What are you looking forward to accomplishing as a board member?**

**A:** As a board member with significant experience in the DSO industry, corporate leadership and another association within the healthcare industry, I hope to contribute to the development of a solid foundation and on-going support for WinDSO which enables rapid and sustainable growth while continuing to add value for members.

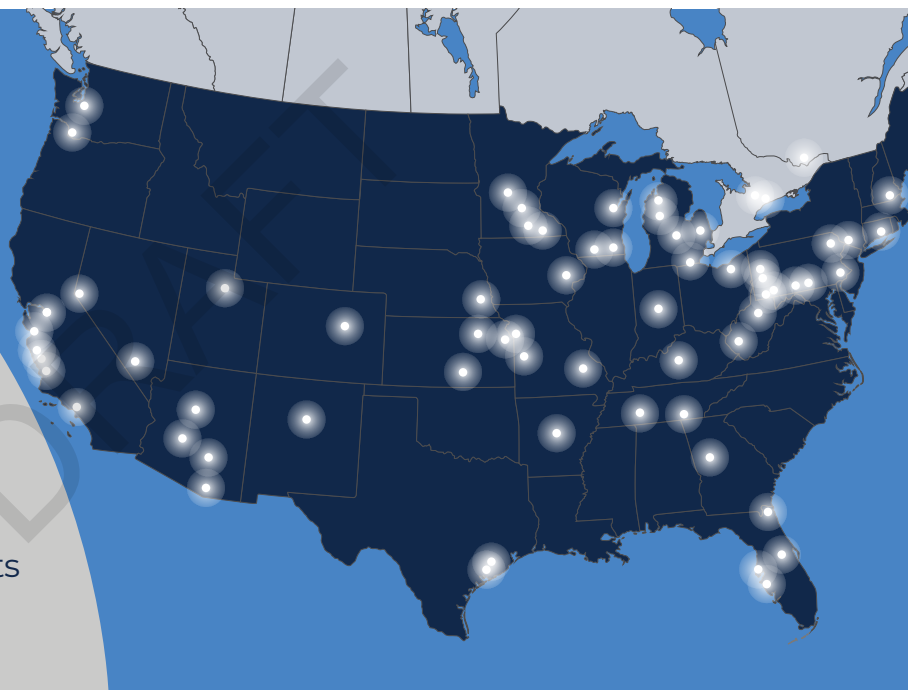


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## **Sarah Sharfstein:** Vice President Category Development, Aspen Dental



Sarah Sharfstein joined Aspen Dental Management, Inc. in October of 2018 in the newly-created role of Vice President of Category Development and Strategy, with a focus on creating and growing an Orthodontic business. Prior to joining Aspen

Dental Management, Inc. Sarah was a leader at Align Technology, the makers of Invisalign. While at Align, Sarah held a variety of positions including directing a regional sales team, developing Align's business optimization program, and leading all orthodontic study groups.

She developed Align's Key Opinion Leader program and led the Professional Marketing and Education group for the orthodontic channel. Sarah received her MBA from Santa Clara University Leavey School of Business (MBA) and her undergraduate degree from the University of California, Davis. Sarah volunteers with

the American Cancer Society of Chicago, is a member of the University of California, San Francisco Dean's Advisory Council and is on the American TeleDentistry Association board.

### **Q: What got you excited about WinDSO?**

**A:** I love the idea of bringing women in DSOs together! It is a great opportunity to celebrate successful women making impact across the industry and create a network of these leaders to support one another as they take on new challenges and look to grow both professionally and personally.

### **Q: What are you looking forward to accomplishing as a board member?**

**A:** As a board member, I want to work to create an inclusive, collaborative environment that will facilitate learning, networking and recognition for women in the DSO space.

## **Andrea Hight:** Director Strategic Initiatives, Darby Dental



After graduating from dental school in Australia where she grew up, Andrea Hight practiced dentistry for the Tasmanian Health Department before marrying an American on a trip to the US. At that point she had to switch countries. Andrea

spent 14 years with the Utah State Health Department where she developed and implemented a clinical access program to provide effective dental care to underserved populations. She assisted numerous programs to build and run dental clinics; participated in studies related to fluoride varnish effectiveness and impacts of oral health care on pregnant women and medically compromised patients; and worked on national issues. She also served as the chief occupational health officer for the Utah State Health Dept.; and helped develop state oral health policy.

Andrea has worked in several management and director roles related to public health and group practice models including as an area director and director of community health. Andrea serves on

several boards of directors and believes strongly in contributing to oral health initiatives and causes that affect the underserved in our communities. Andrea has presented regularly at national and regional oral health conferences on various clinical and management subjects.

### **Q: What got you excited about WinDSO?**

**A:** The moment I learned about the mission and purpose of Women in DSO, I jumped at the invitation to become a founding board member. Having been a part of the dental industry in various roles over the years, I have experienced and seen how women have had to work exceptionally hard to be recognized for the contributions and considered for positions for which they have been eminently qualified.

I am honored to contribute to the mission of WinDSO and that this organization has given us all a platform where we can work together to encourage, nurture, and support women in their dental careers and especially in their desires to become effective and recognized industry leaders.

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**Q: What are you looking forward to accomplishing as a board member?**

**A:** I hope to get to know the attendees, form connections and new friendships, share knowledge and promote the mission to help my fellow sisters in the industry.

**Theresa Schekirke: CEO, Gennua Consulting and President of International Woman's Forum**



Theresa is a seasoned business executive and corporate and philanthropic board member. She is currently CEO of Gennua Consulting and President of the International Women's Forum-Kansas, and most recently was the Chief Executive

Officer of Samson Dental Partners and Chairman of the Board of KCB Bank.

She serves on the Boards and Committees of not-for-profit organizations, including the Kansas School of Classical Ballet where she is President, and the Midwest Ear Institute where she is Chairman. She is passionate about funding and sustainability for the not-for-profit organizations she supports, and operational excellence of the corporations with which she works.

**Q: What got you excited about WinDSO?**

**A:** Today, most industries recognize the need to form organizations to elevate, support and empower women leaders. We've seen this attempted in the dental world, with non-sustainable results. It takes a passionate leader to get a significant and meaningful organization started and sustained, and Dr. Aman Kaur's desire to make a difference for women leaders in DSO is what we need.

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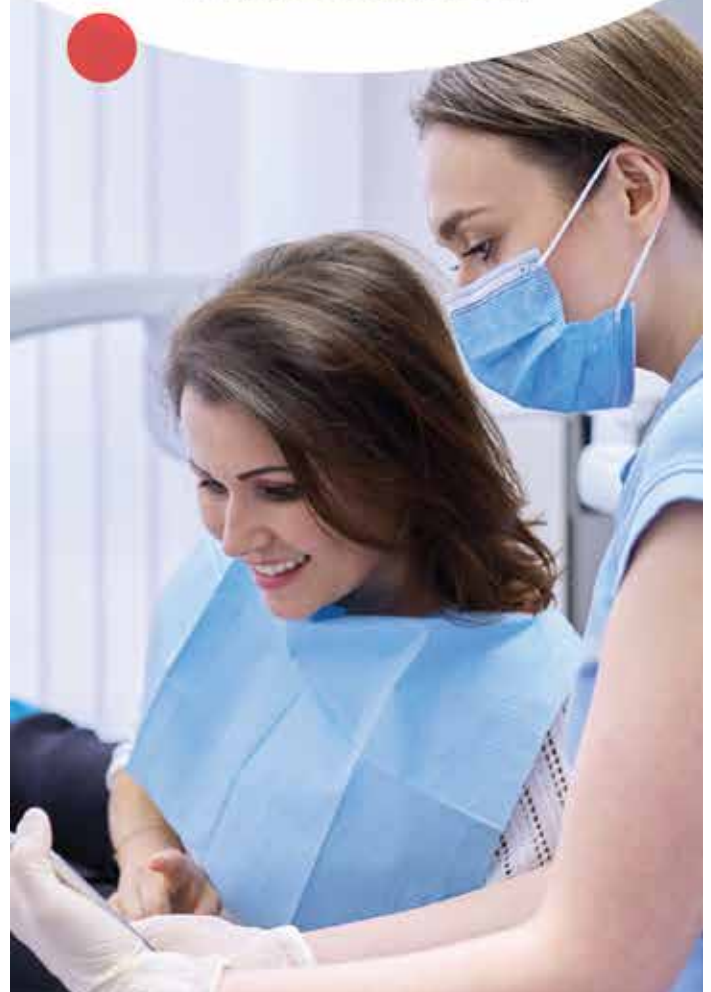
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# Guiding Leaders

Glidewell CEO Stephenie Goddard is passionate about empowering women in dentistry to advance to new levels of leadership.

**Stephenie Goddard noticed something** was missing. As of 2019, approximately 50% of dental school graduates were women, but opportunities for them to network and grow in the industry as leaders were rare. Thus she formed Guiding Leaders – a program covering important topics, best practices, and offering a space for leaders to meet, network, and grow together.

In the following interview, Goddard discusses the upcoming year for Guiding Leaders, the commitment involved, and what participants can expect to get out of the program.

**Q: What is new this year with Guiding Leaders?**

**Goddard:** The first year was 12 months long. This year we've tightened it to six months. We got feedback from everybody on the first program – what worked, what didn't, what programs rated the highest, etc. We tried to scale back and focus on the things that got the most feedback in terms of what participants needed from the program. We're adding a lot more finance and practice management to this session, whereas last time we had a heavier amount interpersonal and leadership competence building. We'll still have that, but we just toned it down.

**Q: What is the commitment?**

**Goddard:** Participants must commit to being in person for each session.

One weekend a month, they need to be in Newport Beach, California, for class. They will need to pay for their travel and hotel stay, but we cover the cost of everything else. We want participants to really engage. I'm looking for people who are willing to commit to the bigger initiative, which is creating a larger network of women in the industry. Anybody who was in the prior year's cohort will be a mentor to the participants this year. The goal is that people joining this year will then be a mentor to somebody in the following year to grow a mentoring, networking environment.



**Q: What should a dentist expect to get out of it?**

**Goddard:** Participants will get amazing courses by experts in their respective fields. They will get a mentor and an executive coach.

Even though the program is only April through October, we will pay for that executive coach for a full year. They will also have full access to a certified financial planner for a year, whom they can utilize after the program to help increase practice revenue and profitability.

Everybody will get something slightly different, because everybody is in different stages in their life. We had one person who was just five years out of school and practicing in pediatrics, and then we had somebody else who was 35 years practicing and owned three practices, three restaurants and had grandkids.

The prior cohort talked about the sense of community and support they received. They learned more about how to be a leader, how to define and envision what your future looks like and then how to plan to get there.

So let's say one of the participants wants to open up a new practice. She can sit down and put together a business plan with other participants as a sounding board. Questions they might discuss with the group include: How do you retain staff? How do you compensate staff fairly? We've created a group that now can share information with one another, which has proven incredibly valuable.

For more information, or to register for the upcoming program, visit: <https://guidingleaders.com>. ■

# **[MANAGER CHEAT SHEET]**

## **KPIS FOR 9 DENTAL GROUP POSITIONS**



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**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-focused people. The DEO connects dentist-entrepreneurs and DSO leaders to work through challenges together. They emerge confident leaders with vision and purpose to grow their dental groups.

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

To date, DEO members have 1,350+ practices combined with an aggregated combined revenue of \$2.1 billion. The DEO offers membership (benefits include: mastermind sessions, coaching, private member events, peer learning, a resource library, and more on associates, leadership, operations, and systems, recruiting, retention, financial structure, and all the issues dental group leaders face) plus yearly Summits 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 — to go from clinician to entrepreneur. To scale your dental group — you need to track the right KPIs. The numbers can guide you, telling you the facts of exactly how things are going and help shelve emotions and opinions.



# 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 from helping hundreds of dentist-entrepreneurs grow their dental groups and has developed a framework — The Dental

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

To keep your team aligned and working toward the same goals, you need clear expectations and consistent metrics for each job position. KPIs are the backbone of aligned systems which can help keep your team out of chaos and moving in momentum toward a common vision.



# KPIS FOR 9 DENTAL GROUP POSITIONS



“My biggest challenge is time, focus, and alignment from the top down.” This is what one dental leader said when discussing their biggest challenge at The DEO Fall Summit last November. If you’re honest you face this too ... the challenge of leading your team in alignment toward the same goal. How do you motivate your team and hold them accountable? That’s why numbers are so important in building a culture of knowing (and owning) KPIs.

To help you discern which KPIs are best for your team, we’re excited to tell you about our newest resource, the “[Manager Cheat Sheet] KPIs for 9 Dental Group Positions.” To download it, simply scan the QR code to your right to gain instant access. The KPIs within were hand-picked from our experience with thousands of top dental leaders. Fast-growing successful dental organizations are using these KPIs right now to align their teams and drive growth. In this resource, you’ll find suggested roles, responsibilities, and KPIs for 9 key dental practice positions. Use this Manager Cheat Sheet as a shortcut to determine your team’s KPIs — don’t reinvent the wheel, learn from those who are using these same KPIs right now to grow rapidly.

When you track the right KPIs, the numbers can guide you, telling you the facts of exactly how things are going and help shelve emotions and opinions. They can be the starting place for a super productive discussion and what areas of support are needed and a springboard for ideas.



**The result:** Better performance, with consistency, and holding your team accountable by looking at the same exact things and striving toward the same goals and vision.

Following is sneak peek of what you’ll find in the [Manager Cheat Sheet] KPIs for 9 Dental Group Positions:

## SNEAK PEAK OF KPIS BY POSITION

### Dental Group Job Position 1: Dentist (Associate)

- › Production
- › Supply/Lab Cost Per Hour
- › Plus 5 other KPIs

### Dental Group Job Position 2: Dental Hygienist

- › Production Per Visit
- › Reappointment Percentage
- › Plus 5 other KPIs

### Dental Group Job Position 3: Dental Assistant

- › Treatment Acceptance
- › Plus 2 other KPIs

### Dental Group Job Position 4: Office Manager

- › Collections
- › Cancellations/No-Shows
- › Plus 9 other KPIs

### Dental Group Job Position 5: Insurance Coordinator

- › % Claims
- › Plus 2 other KPIs

### Dental Group Job Position 6: Treatment Coordinator

- › Patient Acceptance
- › Plus 2 other KPIs

### Dental Group Job Position 7: Front Office Team

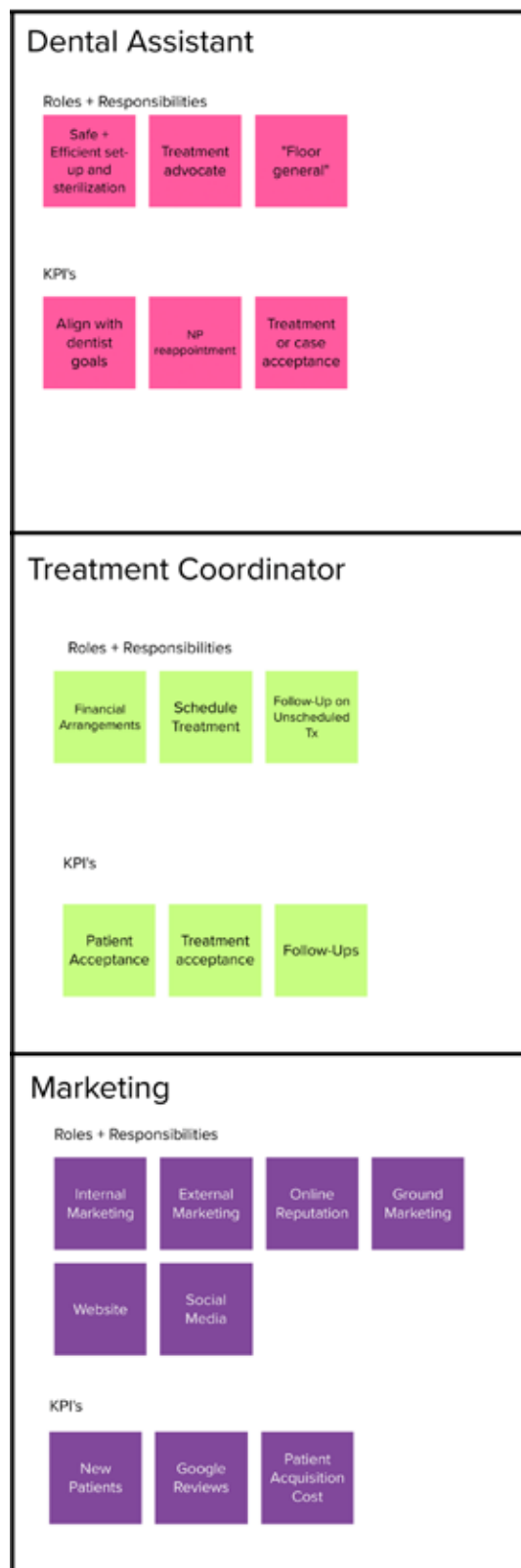
- › Call Conversion
- › Scheduling Efficiency
- › Plus 2 other KPIs

### Dental Group Job Position 8: Regional Operations

- › Facility Utilization
- › Same-Store Sales Growth
- › Plus 3 other KPIs

### Dental Group Job Position 9: Marketing

- › New Patients
- › Plus 2 other KPIs



# Practice Waste Solutions for Your Dental Group Practice

**In order to operate, dental offices** must be in compliance with several regulations on the local, state and federal level when it comes to their handling of waste materials. According to the American Dental Association, dental best management practices for waste handling and disposal involve a multi-layered defense, including use of chair-side traps and professionally installed amalgam separators, regular inspection and cleaning of traps, and use of an appropriate commercial waste service to recycle and/or dispose of collected amalgam. Dental offices must consider all these factors when providing appropriate solutions to practices in need of timely compliance.

Fortunately, Solmetex is here to help busy dental practices be in compliance with the EPA Dental Rule on the proper handling and recycling of amalgam waste, so they can focus on the daily care of their patients. Along with its comprehensive Waste

Compliance Program that includes the disposal of all regulated dental waste, Solmetex offers a variety of disposal kits for all sizes and types of dental practices, including:

## Amalgam Recovery

Amalgam waste is found within the dental practice. The most common is the “chairside trap”. Other waste amalgam items include: leftover or spent amalgam, removed teeth with amalgam fillings, empty amalgam capsules, and vacuum trap containers located by the vacuum pump. All of these contain amalgam residue. Even if a dental practice claims to be amalgam free, composite only, they can still generate waste amalgam from removed teeth and from chair-side and vacuum pump traps. The Amalgam Buckets come in four sizes and Solmetex provides a UN/DOT approved storage and shipping container with prepaid return shipping and certificate of recycling for the generator.

## Lead Recycling

Waste lead foil and lead apron are collected and placed into DOT/EPA approved storage/shipping containers for proper recycling. Lead Buckets come in two sizes and the Lead Apron Bucket fits approximately 2 aprons. Containers have labeling and shipping documents to transport waste for recycling. Generator is supplied with prepaid return shipping container, recycling, and proper documentation.

## Photo Chemical Recovery

Waste photo chemicals from x-ray film processing equipment are filtered rendering waste non-hazardous to meet local, state, and federal requirements for discharge into public sewer. Spent filter is shipped for recycling via DOT/EPA approved storage/shipping container. Generator is supplied with prepaid return shipping container, recycling, and proper documentation.

## Bio-Hazard Sharps Disposal

Variable size containers to collect biohazard needles, broken glass, paper towels, gloves, articles of clothing, bandages and gauze. Mail back kit includes prepaid return shipping container with disposal and proper documentation.

For more information, including part numbers and supporting documents, <https://solmetex.com/practice-waste-solutions>. ■



# If dry waste management is slipping through your hands...

The EPA is enforcing its Dental Rule, so if you're not managing your dry waste as efficiently as the wet, inspectors will be at the door. With decades in dental waste management, Solmetex has easy-to-use tools for every aspect of hazardous waste.

- A turnkey solution for dry waste management
- Easy online access to Proof of Recycling certificates
- Tools for handling biohazard, lead, photo chemicals, and sharps
- Disposal, shipping, and recycling in one highly functional container



**When it comes to waste management, compliance beats consequences.**

To learn more, contact **Solmetex 877-207-1551** or visit **Solmetex.com**



**PRACTICE WASTE SOLUTIONS**

Amalgam | Biohazard | Lead | Photo-chemical | Sharps



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# A Vision for the Future

MFD Dental Management's partnership with Skytale on financial parts of the business allows its clinicians to focus on delivering world-class care.

**For Dr. Steve Markowitz, “doing it alone” was never an option. A third-generation dentist, Dr. Markowitz was thrust into the role of helping to lead a dental practice while a dental school student when his father was severely injured in a ski accident. “That shaped my view of team and having to rely on doctors, employees and processes, because I knew I could not do it alone,” Dr. Markowitz said. “It wasn’t an option for me from day one.”**

Indeed, the wisdom gained from having to rely on other people has been incredibly beneficial to Markowitz's organization, MFD Dental Management, LLC an emerging dental group practice about a half hour outside of Boston. MFD currently has five locations and 107 employees. As one of MFD's leaders, Markowitz's job is to ensure that each seat in the organization has the best and most talented person in it. That's what led Dr. Markowitz to reach out to Skytale, a full-service strategic, financial, and M&A advisory firm, when MFD was at three practices and around \$10 million in revenue. MFD leaders wanted expertise in creating a clear financial vision of what tomorrow would look like next year, and five years, down the road – not just for the organization, but for each practice, partner and employee. “We needed to be able to fully understand all of the financial aspects of



Dr. Steve Markowitz

the business and how to continue to grow in the smartest way.”

Dr. Markowitz said from the initial conversation with Skytale's Founder, Benjamin Hernandez, he knew the partnership would be fruitful. “Ben is someone who understands the financial business of dentistry, but I could also tell he really cared about the success of me and every

single person that is part of this organization,” he said. “I get that same feeling from our meetings with Skytale's team. It's as if they work as part of our organization, not as a consultancy telling us what's best.”

Discussions happen a few times a week and range from how best to utilize capital expenditure budgets, to forecasting P&L, to navigating employee reviews and pay increases, to everything in between. It goes well beyond a consultant/organization relationship, Dr. Markowitz said. “I truly feel that they're a partner and part of our team,” he said. “Our success is their success.”

In a short period of time, MFD has grown almost 60% since. Dr. Markowitz credits the MFD team's drive to deliver high-class patient care, and Skytale's guidance, for that success.

When fellow dentist entrepreneurs ask about Skytale, Markowitz tells them that beyond the services offered, Skytale provides organizations comfort and sophistication. “As a dentist first, entrepreneur second, I have comfort knowing what the next year is going to look like,” Dr. Markowitz said. “It's also a level of sophistication that when we look to acquire new practices or expand, we can financially model that. Now I'm willing to take greater risks. And those greater risks have shown incredible dividends to our organization.” ■

**When fellow dentist entrepreneurs ask about Skytale, Markowitz tells them that beyond the services offered, Skytale provides organizations comfort and sophistication.**



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# Changing Lives One Smile at a Time

How to lead your team to success, while cultivating an amazing culture along the way.

BY LORRI DETRICK, CHIEF OPERATIONS OFFICER AT RICCOBENE ASSOCIATES FAMILY DENTISTRY

**When I joined Riccobene Associates Family Dentistry, I could tell this** was a different type of organization. Right from the start, I knew I had found my home.

As I interacted with our many dentists and team members, it was obvious that the culture was beyond just the rigid roles of managers, employees and coworkers. They treated each other like family. Team members didn't just show up to a job – they took ownership and pride in their work.

That's because our founder – Dr. Michael Riccobene – has built the company with one clear priority: Building real relationships with doctors, managers, and team members. Our team feels like a family because he treats them like family.

Sam Walton said it best: “If people believe in themselves, it's amazing what they can accomplish.” Through Dr. Riccobene's example, I have found that when a leader believes in their people, they can accomplish remarkable results.

Many people on staff have been with him for more than 20 years. As we have grown, new team members have told me that they feel fortunate to finally be part of an organization like ours.

As you acquire practices and grow, you're integrating people who come from a diverse range of work cultures and processes. That's something that we focus a lot of energy on, and we stay nimble by sharing our resources with new team members. This helps with that integration process so that people can absorb our values.



## The Riccobene Way

Our values are summed up in what we call “The Riccobene Way.” It's a devotion to the experiences of both patients and employees when they walk through the doors of one of our locations. When you practice empathy and put yourself in their shoes, everything else usually falls into place.

Our company motto is “Changing lives one smile at a time.” We have it painted on the walls of every one of our waiting rooms, in big letters for everyone to see. For Dr. Riccobene that means changing the lives of his employees, not just patients.

It's not just about fixing people's teeth. It's about helping people be more confident, have better lives, and helping employees get better opportunities. The employee experience is just as important as the patient experience. This value system was one of the things that really attracted me to this company.

Unlike my other work experiences with dental groups, Riccobene doesn't focus as much on metrics and numbers. Even though the company has been successful financially, staff quotas aren't the main driver.

Other DSOs may be keyed into a production goal, “This is what we have to do today, this is our monthly goal, etc.,” but that really hasn't been the discussion within Dr. Riccobene's organization. He's very focused on providing comprehensive care that patients and team members feel great about. If we do that, we believe the money will follow – which has held true.

For example, this year we rolled out an incentive program for all employees where the office managers will be able to submit stories about employee experiences with



patients that are creating good reviews and goodwill. There will be a monthly bonus awarded, and at the end of the year, the person who best emulates our customer service experience expectations will win a cruise vacation for two to the Caribbean. Our people are excited about that. It's very clear within the company that the customer experience is what matters most.

As an executive team with several new members (including me and our chief financial officer), we went through an exercise this past fall of nailing down our core values. We wanted to make sure that when we are recruiting new employees and evaluating current ones, we ask questions that align with those core values.

This involves asking questions about what an applicant would do in various hypothetical situations. Their responses give us a solid feel of their character and values as a person, and whether that aligns with our values as a company. It's important to move on quickly from a candidate, or remove someone, when we identify that they are not aligned with those values. Or else they will become toxic for the culture we're creating.

### **Creating great experiences**

One of the reasons we can attract such talented doctors, is because Dr. Riccobene is committed to giving them autonomy and the freedom to work to their own strengths.

We do have a robust compliance program, but we get few (if any) clinical complaints. We believe the quality of care is high because doctors have that autonomy. They're not pushed into doing things they don't feel comfortable with.

We also have many specialists that our doctors can refer to on-site. Of course, this makes financial sense because patients don't have to go somewhere else for specialty care. But it's also advantageous

**We do have a robust compliance program, but we get few (if any) clinical complaints. We believe the quality of care is high because doctors have that autonomy. They're not pushed into doing things they don't feel comfortable with.**

because we're not having re-dos, complaints, and refunds from not having that specialty knowledge on-site.

Like other dental groups and businesses in general, we do deal with staffing challenges – higher turnover, higher demands for employees, higher labor costs, difficulty recruiting, etc. We're competitive with our salaries, but that's not going to keep people long-term.

Instead, it is crucial to focus on intangibles, like why people want to work here. For example, we buy lunch for our offices on Fridays. And once or twice a month, every office has a massage therapist come in for the employees. These are just a couple examples of how our team can see how important they are to us, and I think it helps make our culture what it is.

We've also recently rolled out a scorecard for our managers and regional managers that is based on patient experience, employee experience and financial results. These scorecards have targets that we need to hit as an organization, and it is weighted toward employee experience and customer experience. For instance, if a leader has a low employee score or customer score, then they are not eligible for a bonus.

These examples all demonstrate a consistent message about our culture – if the employee experience and patient experience aren't great, then we all must take ownership in improving them. The success of our practices depend on it. ■



**Lorri Detrick**

is Chief Operations Officer at Riccobene Associates Family Dentistry, which operates in North Carolina and Virginia. The organization has about a thousand employees, including 120 dentists, across 55 locations.

# Growing Your Dental Practice with a New Branded Product

BY SARAH SHARFSTEIN, VP OF CATEGORY STRATEGY AT ASPEN DENTAL



**When trying to grow a dental practice, there are many paths to take.** Some of the tried-and-true methods are bringing more doctors on board, attracting new patients, and introducing new technologies and services for better patient care.

But one method that is often overlooked: developing a new branded product that meets an unmet need for your patients.

## Understanding the needs of patients and doctors

In dentistry, we get to know our patients well. Doctors, hygienists, and dental care teams understand patient needs and challenges – both individually and at scale. And that

means we are continually looking for opportunities to improve their experience, their health, and their smile.

In 2018, when I joined Aspen Dental, the largest network of branded dental offices in the world, after spending more than a decade working in the clear aligner space – we saw a great opportunity – a white space for the company.

The Aspen Group (TAG) is a healthcare services organization

headquartered in Chicago that supports doctors and dental care teams at nearly 1,000 independently owned Aspen Dental practices across the country. As a healthcare service organization, its primary objective is to support practice owners and doctors so they can provide better care to more people.

TAG is continually looking for new ways to support doctors and their teams – to help them advance their knowledge and expertise in new and innovative areas of dentistry. While Aspen Dental has long been known for providing general dentistry and restorative care – including dentures and implants, one area where I immediately saw opportunity to differentiate in orthodontics was clear aligners.

Clear aligners have been part of the orthodontics category for more than two decades. But the opportunity was: truly understanding what consumers were looking for, understanding the challenges doctors face, and finding a new way to fill that gap in the clear aligner space.

When it comes to clear aligners, we know consumers are looking for consistency in the brand experience, and a doctor-guided experience that will prove effective and long-lasting results – something they could not truly find anywhere else. This was the challenge.



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\*Data on file at Align Technology, as of July 15th, 2017. Based on a survey by Hawk Research, Invisalign providers who started at least 1 adult Invisalign case in an average month were asked: "Of the patients that you see in the following age groups, what percent request Invisalign?" (USA n=337). Doctors were paid an honorarium for their time.

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The solution? Motto. As we developed our first branded consumer product – Motto Clear Aligners – we knew it needed to take into consideration the needs of Aspen Dental patients and easily integrate into the existing workflow for Aspen Dental doctors and their dental care teams. All in an effort to stay true to our mission to provide better dental care for more people.

### **Supporting the doctor, every step of the way**

Integrating orthodontics into a group practice led organization presents a number of challenges. Notably, most dentists leave school with virtually no orthodontic training. For this reason, we know it's critical to find ways to educate the doctor and their dental care teams so they can feel comfortable and clinically confident when they present new service lines – such as Motto Clear Aligners – to patients.

At Aspen Dental, we are intentional about our training and mentorship programs. We are focused on removing friction for the doctor, so they can advance their understanding

and expertise while providing better care for patients.

Our end goal is not to turn our general dentists into orthodontists, but instead – develop centralized clinical systems and processes to make delivery and care simple. We work on centralizing the treatment planning approach, and we have an orthodontist on the team to support educate the doctors.

For the doctors who want to build their orthodontic muscle and provide more advanced treatment to their patients, we provide advanced education, training and mentorship programs – making sure the doctors know they are supported every step of the way.



Sarah Sharfstein

### **Enhancing the consumer experience**

The other piece we had to think about with Motto – as a newly introduced brand – was the consumer experience. How could we deliver a differentiated consumer experience that meets the patient's needs and improves productivity for the offices?

Consumers are looking for simple online scheduling, office hours that work around their busy schedules, a simplified and streamlined clinical experience, and ultimately a price-point that works for their life – something many of the existing traditional clear aligner companies simply cannot offer at scale.

With more than 950 locations, Aspen Dental has a number of access points that makes things much more convenient for our patients. With tools like an online scheduling system, evening and weekend hours, and an office experience that is enhanced with the latest in digital dental technologies, we are uniquely positioned to deliver on convenience and affordability. All with the expertise of doctor-led care that leads to results that patients love.

### **Bringing better care to more people**

While both doctors and consumers have many options, as experts in dentistry, we know – comprehensive dental care can impact overall health, confidence, well-being, and so much more. When you understand the needs of the patient and the provider, and find ways to enhance that experience for both – you'll ultimately bring better care to more people. That's our motto. ■



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# Clinical Scaling Leadership

BY EMMET SCOTT



**The challenge of great leadership is that it requires you to be clear** about your vision and where you want to go. As an entrepreneur, if I'm going to bring something special to the marketplace, then I've got to know what I'm working with and what I'm focused on. I see this happening now in clinical circles – clinical leaders are starting to ask, “Who are we? Who do we want to become?”

For dental practices, that goal is growing ideal patient care. It's a vision that aligns well with the business aspect of owning a dental group. But when you combine a scalable growth mindset with things on the clinical side, there can be concerns about how much standardization and structure will impact clinical autonomy and if that impact is the right choice.

Clinical autonomy has been such a tenet of what it means to be

a dentist that it has become almost untouchable. On the one hand, you have the kind of practice that says to new associates, “We want to give you your autonomy. Whatever you want to do, that sounds great.” That can sound really appealing. But the downside is that the dental group won't be able to provide the same level of resources to support that associate because they can't afford to chase that many rabbits of potential patient care. So

oftentimes things just get watered down to a general level of support for bread-and-butter dentistry. Ultimately, this stagnates clinical development for dentists who want to go deeper and expand their patient care capabilities.

Compare that to a practice, or group of practices, that is super-focused on who they want to be in the marketplace and what value they want to provide. They have a clinical vision and specific structure. They have an internal standard of care run by a clinical team. The procedures they do they can do very well because that tight focus gives them the ability to pump a huge amount of resources into the offerings and the associates training.

I love the name “DSO,” because it's a Dental Support Organization. It's always playing second fiddle. It's support. I always want DSOs to stay in that supporting role. And a DSO can support a clear vision of a clinical team better than it can support a clinical team that would rather have the ability to (technically) do whatever they want to do.

What's great for clinicians about the second model is that they know what they're getting when they sign up. They know what kind of support, what kind of mentorship, what kind of patient types they're going to be focused on. Not only that, but they can be certain that they will have the resources to provide a really high level of quality care. ■



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# Why Your DSO Needs a Good Project Manager



**Project managers might be one of the best kept secrets in the world** of dental service organizations. A lot of other industries understand the importance of project managers and where they fit into a business that's growing in that world, but they didn't really exist in the DSO world until three or four years ago. What you may find is that scaling your business creates a series of projects, and you may not have the people on staff to cover these projects. A good project manager will come in to bring order and balance to the chaos of your business. Recently, the DEO spoke with some of the best project managers in the dental industry to discuss the importance, innovations, and value of project management:

- > **Margaret McGuckin** is the Co-Founder and Principal at i3 Ignite.
- > **Jodi Evans** is the COO at Community Dental Partners.
- > **Brett Evans** is the Director of Strategic Planning at Community Dental Partners.

**DEO: What is a project manager?**

**Margaret McGuckin:** A project manager is someone who can really understand the relationships, processes, and details required to take an initiative and move it forward in the timelines that it needs to be moved forward. I learned project management from IT people who basically invented agile thinking. Agile thinking is really just a very structured way to approach managing a project. A good project manager will have the skill set to know when to escalate an issue as well as to whom to escalate an issue.

**Jodi Evans:** We have this triangle that's broken up into thirds; this is the way we explain it to our team. The top section of the triangle is what we call "make it up," which is our executive team's responsibility. The middle section is the "make it real" section, and that final third is the "make it reoccurring." We learned that we needed a project manager to bridge the gap between "make it real" and "make it reoccurring." That brought us a lot of momentum, because I wasn't pinging the reoccurring team (regional managers or practice managers) to take my vision and make it work.

**Brett Evans:** I think a good project manager protects the company by protecting those who give the vision and protecting those who



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are expected to implement it by bridging that gap and creating structure out of the vision that a reoccurring team member can digest and implement into their day-to-day job. Also, they should have empathy for the end user of where all this vision and strategy is going and creating solutions that people will be excited about versus resentful about.

## A lot of the project managers I have are kind of homegrown talent; they have come up through the organization and have taken the initiative to get things done.

**DEO: Who do you hire to be a project manager? Do they need a degree or a certain set of skills?**

**McGuckin:** At Clear Choice, the first person I hired had absolutely no background in project management, but she had done event planning management. I think the skills are very similar, and she really had the people skills to make it work. I've also had people who were masters in program management work for me. I don't think you necessarily need a master's level person. I think you just need someone who can meet your needs at the time and who you believe can really grow with the company as the company grows.

**Jodi Evans:** I look for someone whose Enneagram's going to come back that they're a challenger because I want someone that's going

to tell me that I am screwing up and they're not going to just tell me "yes" when they should be telling me "no."

**Brett Evans:** We have a variety of people on the team. We hired someone as an administrative assistant initially, but she became a project assistant because she showed that she had the right skills for the

job. She's moved and really excelled in that area. I have a project manager who has a background in event management, to Margaret's point. I have two project managers who are certified like project management professionals through the PMI Institute, who came in with some of their skills already honed. But a lot of the project managers I have are kind of homegrown talent; they have come up through the organization and have taken the initiative to get things done.

**McGuckin:** I have also found that administrative assistants are a great pool of potential people. I would also throw paralegals in there. Anyone with really strong organizational skills. They think through things in a very process-oriented way, and they think about discovery, and I like both of those attributes.

**DEO: Do they need a background in dental?**

**McGuckin:** Not at all. You can learn dental, right? But you have to have the native attributes and you have to really want to do it. No, I don't think I ever hired anybody from inside dental as a project manager.

**Brett Evans:** No, dental knowledge is not a requirement in any way.

**DEO: What kind of software do you use?**

**Brett Evans:** The best place to start is Google Sheets, or the free version of Trello. We still use Google Sheets for a lot of things. Smartsheet has some cool functionality and is relatively inexpensive. We also recently started using monday.com, but we haven't completely figured out the full functionality.

**Jodi Evans:** I would say Google Sheets 100%. I'm an advocate for easy. It's easy adoption, it's connected to our email. You don't really need anything super sophisticated for your project management system. Just work on having a project manager that's successful.

**McGuckin:** We started with Microsoft Project, and we went to Google Sheets. I love Trello, actually. We use Trello with some different clients. I'm just as happy to use some plain spreadsheet. You can get super complex project management software, and maybe if you're working in IT at a really high level, that's important. But if you're a good project manager, it's not necessary. ■



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– *Jeff Longfield, VP Operations,  
Signature Dental Partners*



#### Introductory Call

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# Buy or Rent?

## Should you buy, or rent, your location?

Like most good questions, the answer is – it depends.

The first priority is finding the right location for your business. It's critical to have the right combination of demographics. You generally want to have high population density and less competition. Stay away from a place that's saturated with other dentists. Within your trade area, find the locations that meet this criteria without getting too hung up on buying versus renting. Picking the wrong location could easily kill your business.

We usually recommend renting in high visibility locations. Even though it's considerably more expensive to rent, a good way to think about it is through the lens of cost of acquisition per customer.

For example, if your cost of acquisition is \$200 per customer and you want 30 new patients a month, that's \$6000 per month in marketing expenses. If a high visibility retail location can also net 30 new customers, you could afford to spend up to \$6000 a month in rent and break even. If you have a 3000 sf location, you could afford to spend \$24/sf per year extra.

**3,000sf x \$24 = \$72,000 in annual rent**  
**\$72,000/12 months = \$6,000 extra in rent per month**

However, the difference in a good location could cost much less than the marketing budget and still net the same amount of new customers.



BY AUSTIN HAIR,  
LEADERS REAL ESTATE

In the next scenario, let's assume everything is equal. You have two identical locations; one is available for rent, one for sale. You think, "I'll buy. I get a good return on my investment and I'm diversifying."

Not necessarily. First, the value of your building is based on the tenant. It is not like residential real estate where it's 100% based on the location. Therefore, you don't have diversification because the value of the building is tied to the success of your business.

If you have a high conviction in that area and you think the value is going to go up over time, then it might still be a great investment.

Another consideration is the allocation of capital. Every business is constrained by the amount of capital they have. If you have one location and plan on scaling to 2, 3, 10, even 30 locations, then you're going to be limited by the amount of capital and debt you have. If you don't plan on expanding, then it makes more sense to buy the real estate and own it indefinitely.

For commercial real estate, you've got to put down 20% to 30% of the purchase price as the down payment. That cuts into your ability to scale. Real estate often gives safe returns between 8% and 20% annually, but what do you get when you invest in your business? It could be 30% to 50%, sometimes even 100% or more.

If the perfect location is only available for purchase, partner with a group that will buy it on your behalf and lease it back to you. There are several groups that do this, including Leaders Real Estate.

Ultimately, you've got to ask yourself, "What am I trying to do long term?"

Leaders Real Estate is a Commercial Real Estate brokerage specializing in Tenant Representation. Over the years, we've noticed the lack of support businesses have in identifying the right location for their business. We've developed tools that can help small and large businesses alike in providing the numbers behind the "feeling." ■

# The Revenue Cycle Management Bootcamp for Emerging DSOs

**Zentist, the automated dental insurance claims processing platform,** launched the dental industry's first revenue cycle management (RCM) bootcamp designed specifically for professionals working at or building dental support organizations (DSOs), especially dentist entrepreneurs.

The purpose of the bootcamp is to bring together DSO industry professionals and RCM subject matter experts in an interactive learning environment. Attendees will participate in educational and networking sessions. They will gain exposure to the strategies of leading organizations in such processes as eligibility and benefits verification, claims submission, payment posting, denial management, accounts receivable (A/R) follow up, as well as RCM data analytics.

"Unlike the U.S. medical industry where I've previously worked with hospitals and health systems, there is a lack of dental industry specific curriculum for professionals working within or overseeing the RCM function at DSOs," said Sina S. Amiri, the co-organizer of the bootcamp. "Most existing dental industry conferences covering topics related to dental insurance billing attract attendees working at solo practices and are often taught by those who have not had the benefit of gaining operations leadership experience at a DSO."

In addition to Mr. Amiri who ran the national operations of a private equity backed DSO prior to building

industry partnerships at Zentist, instructors teaching at the bootcamp will include:

**Dr. Tarek Aly** - Co-founder & COO of OrthoDent Management and Modern Smiles

**Teresa Williams** - Chief Operations Officer at Dental Express

**Ellie Naderi** - Operating Partner at Latticework Capital Management

**Jenny Organista** - Director of Revenue Cycle Operations at Underbite Management

**Dr. Wayne Silverman** - Dental Director at Dominion National

**Harold Gornbein** - Founding Partner of Apex Reimbursement Specialists

**Farhad Attaie** - TED Resident and Co-founder of hellosmile

**Shadan Shamloo** - Director of Strategic Accounts at Zentist

"Zentist has recruited subject matter experts who understand the challenges of operational scalability

and the complexities of RCM centralization, particularly in a fast-paced, mergers and acquisitions-driven environment. I'm thrilled to be sharing my personal expertise in the DSO industry with the attendees of their bootcamp," said Dr. Tarek Aly, Co-founder & COO of OrthoDent Management and Modern Smiles.

Topics that are covered in the RCM bootcamp include:

- › Improving the cash flow and enterprise value of your DSO
- › Tracking and analyzing key performance indicators
- › Developing RCM leaders within your organization
- › Setting up correct fee schedules and insurance profiles
- › Insurance verification, credentialing and fee negotiations
- › Understanding the applications of robotic process automation, artificial intelligence, predictive analytics, computer vision and advanced technologies
- › Healthcare law, state regulations and compliance for RCM
- › The role of clearinghouses in the dental industry and how to select the right one for your dental group

To register for an upcoming bootcamp, access online recordings of past presentation sessions, join the RCM community or to request more information, please visit [www.zentist.io/events/rcm-bootcamp](http://www.zentist.io/events/rcm-bootcamp). ■

# 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.



all depends on what you are trying to achieve in scale and scope.

- > **Bobby Hansen Jr.:** You need to check out Pearl!
- > **Beth Coffey Gaddis:** Have you checked out Overjet yet? It sounds like it's exactly what you want.
- > **Adam Richichi:** Patient prism, Zentist and soon to be working with Overjet. Hopefully in the future finding some cool stuff for Dental Robot to automate for us.

**Ramin Bahram asked:** What AI software are you using in your offices?

**A few of the DSO Secrets Facebook page members responses:**

**Sina S. Amiri:** "Zentist to Unlock \$2.24 Billion in Real-Time Insurance Claim Payments"

[www.prnewswire.com/.../zentist-to-unlock-2-24...](http://www.prnewswire.com/.../zentist-to-unlock-2-24...)

- > **Aly Sergie:** This looks like a company that will pre-fund anticipated insurance payments and act like a middleman? Is this an oversimplification?
- > **Sina S. Amiri:** I like the simplicity! Every organization and country on the planet uses intermediaries if it can extract value from them. Even North Korea.
- > **Aly Sergie:** What do they charge for this?

> **Sina S. Amiri:** It varies based on several factors including the volume of insurance claims.

**Manuel Barroso:** This is a very broad topic. In order to even consider AI, all (I mean all) of your Data needs to be available digitally. Including Insurance Verification Data. AI encompass many things like Intelligent Automation (IA) which is a combination of Robotic Process Automation (RPA) and artificial intelligence (AI) technologies that together empower rapid end-to-end business process automation from the most complicated ones like Revenue Cycle Management. So, it

**Tom Terronez:** I applaud you for raising the question as it has stimulated some nice conversation. Everyone has contributed excellent feedback, but I want to build off of what Manuel Barroso stated. If you have access to your data, then you can leverage solutions and implement technology that is not dental-specific. If you really did the math and looked at how much is invested in technology in other industries compared to dental, you will realize that the dental industry as a whole is pretty behind. That is not to say the technology currently offered in dental isn't excellent either because a lot of the companies mentioned are doing great things. My overall point is that there are a lot of ways to create solutions if you think beyond what is marketed to the dental space. ■

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