

DE◉MAGAZINE

DENTIST ENTREPRENEUR ORGANIZATION

Best of Tech

Technology services and solutions to accelerate your DSO's growth.

Trends in Group Dentistry
for 2023 & Beyond

How to Increase
Profitability

7 Key Financial Systems to
Build Your Dental Practice

Gary Bird, CEO
SMC National



SEPTEMBER/OCTOBER : 2022
[DENTALGROUPPRACTICE.COM](https://dentalgrouppractice.com)

BUILT *for*
GROWTH



Dental Express
Trusts Dentrix Ascend
with its Growth

**“ I kick myself
that we didn’t do
it sooner. It’s not
going to become
a better time. ”**



Teresa Williams
COO, Dental Express



Watch their journey.
DentrixAscend.com/DEO

MANAGING EDITOR

Graham Garrison
ggarrison@sharemovingmedia.com

SENIOR EDITOR

Daniel Beaird
dbeaird@sharemovingmedia.com

ASSOCIATE EDITOR

Pete Mercer
pmercer@sharemovingmedia.com

CIRCULATION

Laura Gantert
lgantert@sharemovingmedia.com

ART DIRECTOR

Brent Cashman
bcashman@sharemovingmedia.com

EDITORIAL BOARD

Dr. Eric Roman, DEO

Rachel Shipley, DEO

Hilda Gonzalez, DEO



PUBLISHER

Jake Puhl
jacobpuhl@deodentalgroup.com



VP OF MEDIA SALES

Amy Cochran
acochran@sharemovingmedia.com
770.263.5279

DEO Magazine is published six times a year by
DEO Dental Media LLC

If you would to subscribe, please contact us at the
below numbers or address.

DEO Magazine is published six times a year by
DEO Dental Media LLC, 501 Congress Avenue,
Suite 150, Austin, TX, 78701. Copyright 2022 by
DEO Dental Media LLC All rights reserved. If you
would like to subscribe or notify us of address changes,
please contact us at the above numbers or address.

POSTMASTER: Send address changes to
info@dentalgrouppractice.com.

Please note: The acceptance of advertising or
products mentioned by contributing authors does not
constitute endorsement by the publishers. Publishers
cannot accept responsibility for the correctness of an
opinion expressed by contributing authors.

Contents > September/October : 2022

Best of Tech2

Addressing Access: How Technology Trends Expand Dental Care

Innovative technologies can curb the
lack of access to dental care facing
so many Americans 4

Trends in Group Dentistry for 2023 & Beyond

Consolidation, hiring, diversity
and technology rule 6

Know Your Numbers

With the right marketing technology in
place, you'll know exactly what's
driving your success. 12

Partner With Your Practice Technology15

The Future of Dental

How forward-thinking DSOs will
survive the rapid consolidation of
the dental industry..... 16

Merging Technology with Remote Teams19

Modernize your DSO: Patient AR technology with growth in mind

Did you know that the average dental
practice is carrying over \$50K in aging
patient AR and that a mid-size DSO carries
over \$1M? Automating your patient AR
invoicing and payment process is key to
providing a better patient experience and
income growth 20

3 Ways to Prevent Embezzlement With Your Membership Plan22

Patients that Fit Your Practice

How dental group practices can find
patients who fit their unique needs 24

Fast Forward: How Patient Behavior is Driving Technology Adoption in Dentistry26

Improving Dental Care with AI

Increased case acceptance, consistency in
patient care, and confidence in comprehensive
diagnostics are three key areas where
dental groups benefit from AI..... 28

Intra-Oral Sensors Don't Need to be a Pain for DSOs

Jazz Imaging's SOLO sensor, erasing the
complexity of sensors across multiple sites
and mixed imaging software. 30

AI: Solving Preventable Revenue Loss32

Increase Your Dental Organization's Profitability

Three DSO owners share how their cultures
benefit their locations and bottom lines 36

Data, Systems, and Unscheduled Treatment

Through data dental groups may discover
untapped dentistry within the four walls
of their practices. 40

7 Key Financial Systems to Build Your Dental Practice

By tracking your financial performance,
you can make the informed decisions
needed to grow your organization 44

Operational Systems for Scale

The value of creating and implementing
systems for your organization 50

Building Clinical Systems and the Importance of KPIs

Why KPIs are the reality check you
and your business need..... 54

Using a DSO Playbook to Create Alignment

How a playbook can create simplicity –
and success – for you and your team..... 58

Practice Management Software

How to decide if you should switch..... 62

Time to Get Organized

6 key systems to scale your
dental group practice.....66

Keys to Happy Dental Associates70

Industry News72

Hiring a Director of Operations.....76

Best of Tech

By Jake Puhl



Every few months, we get a fresh reminder of how quickly technology changes. A message saying something to the extent of “Software update available” flashes across our smartphone screens, and we’re left with a choice – update it either automatically or manually to continue using the latest apps and services our smartphones can offer us, or risk getting left behind with obsolete programs and workflows.

The COVID-19 pandemic only put the pace into overdrive. In a 2020 report to Wall Street, Microsoft CEO Satya Nadella said “we’ve seen two years’ worth of digital transformation in two months.” So much change in so short a time can cause chaos to not only our individual and family lives, but the organizations we work for as well.

DSOs understand the increased pressure created from this pace of change all too well. The expectations of how they practice clinically, how they run their operations and how they interact with patients are increasing on almost a daily basis. In this issue, we highlight the impact our valued vendor partners are making in the industry with the technology services/products they provide. You’ll see some familiar challenges they discuss – marketing, accounts receivable, practice management, client engagement and standardizing workflows, just to name a few. Their solutions, though, are anything but ordinary, and we encourage you to dig into the insights and best practices they offer.

We’ve also got a healthy dose of feature stories from DSO thought leaders on improving systems, creating a playbook for your organization, and increasing profitability. In business, as in life, you never want to sit still. We guarantee this issue will motivate you to look and move toward your future success!

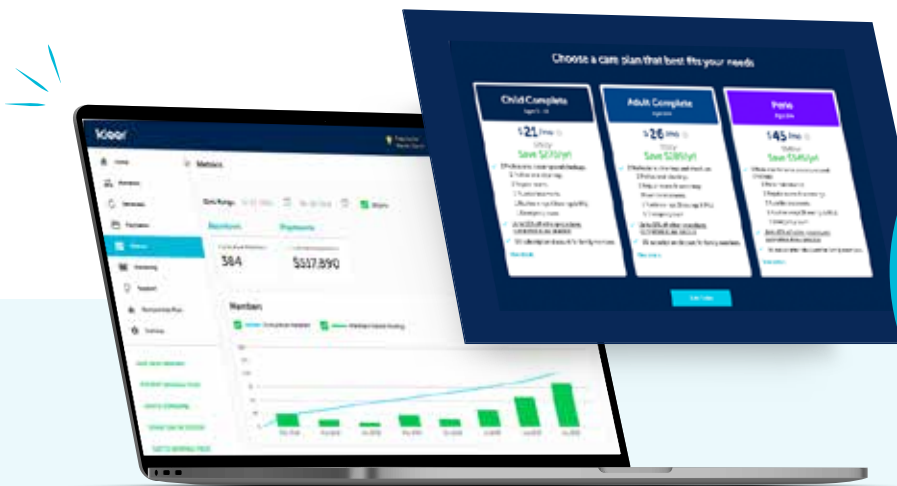
Cheers!

Jake Puhl



A better membership plan to fuel results and practice growth.

Whether you've got one location or many, our powerful solution helps you build, manage, and scale a better, more successful membership plan— **driving production, treatment acceptance, and revenue.**



Kleer patients
are the **best patients!**

2.1X more visits

1.7X more hygiene revenue

**2.5X more treatment
acceptance**

**2.9X more
production**

We love the Kleer program, we are able to help patients without insurance who do not think they can come to the dentist without insurance! **Patients who were putting off treatment are more willing to get what they need done because of Kleer.**

Ann Hayes, Finger Lakes Dental Care | 5 Locations



Custom care plans based on YOUR fee schedules

Easily build care plans to meet the specific needs of your patients, and price them to maximize practice value and ensure competitiveness.



Unmatched support for your success

From implementation to onboarding, training and beyond, our dedicated team of experts is with you every step of the way.



Performance insights and growth strategies

We don't just provide marketing materials — we also work with you to measure plan performance and create growth strategies to ensure your continued success.

It's better, more affordable coverage for patients. It's easy to manage for your team.
It's profitable for your practice. **It's a win-win for everyone.**

Don't wait... start driving practice growth and revenue today!

➤ Learn more at go.Kleer.com/DEO

Addressing Access: How Technology Trends Expand Dental Care

Innovative technologies can curb the lack of access to dental care facing so many Americans.

► BY EMMET SCOTT, CEO, COMMUNITY DENTAL PARTNERS

Many Americans have limited or no access to routine dental care, so finding new ways to expand dental services is paramount. It's estimated that there are 2 million hospital emergency department visits each year for preventable dental pain, costing our healthcare system \$1.7 billion.

To address staggering inequities in oral healthcare, we should turn to our technological resources.

In the past two decades, a visit to a dentist has changed for many Americans. Now, we can watch on a screen as a hygienist moves a camera across our teeth to take digital X-rays. And with the help of artificial intelligence (AI), a dentist can identify tooth decay easier and provide a simpler diagnostic explanation to patients. Teledentistry offers patients the ability to be seen minus travel or high costs, reducing unnecessary emergency room visits, which simplifies processes, saves time, and delivers peace of mind for patients.

Adopting new technology is no longer something only entrepreneurial dentists and younger dentists interested in digital health should do – technology should be part of dental healthcare delivery across practices. The dental industry is anticipating an increase in labor costs and patient



expectations, thus the accuracy, convenience and time-saving benefits of these technologies will prove valuable to patients and practices.

As president of the Association of Dental Support Organizations (ADSO) and CEO and co-founder of Community Dental Partners, I see the ways that technology is increasing access to oral healthcare. Technology supports higher quality dental care, convenience for patients, and streamlined delivery, ultimately expanding access to dentistry for millions of people. Many dentists have welcomed technology and sought out ways to integrate the newest AI tools and systems into their practice. However, this can be costly for those in a single dentist private practice. One of the top reasons dentists choose to partner with DSOs is because we quickly embraced technology and continue to do so.

As early adopters of technology, I've seen DSOs run smoother, resulting in better patient care, employee satisfaction, and practice success. For instance, a patient may remember to schedule a visit when she's brushing her teeth at night and can make an appointment instantly via online scheduling software. While this software seems like an obvious investment as it improves operations and patient satisfaction, its adoption isn't industry wide and can be quite complex.

Of the many resources that DSOs provide, technology plays a primary role in creating seamless dental visits, from first contact to appointment reminders and patient follow-ups. What's more, our commitment to continuous learning ensures that practice staff are trained on the latest technological advances and best practices. Once well-versed, practice teams can support dental access for more patients, especially those who face uncertainties regarding access to oral healthcare.

With advantageous buying power, DSO-affiliated dentists can access these various technologies and provide the benefit to patients at a lower cost, ensuring improved access and better oral care outcomes for all. ■

ClearFees ClearGrowth ClearPay™

onDiem ClearPay™ eliminates concerns about staffing costs so you can focus on what really matters—growing your practice safely.

YOU EARN



\$5,500

Avg value of one day of RDH production and referred dental treatment

YOU PAY



\$500

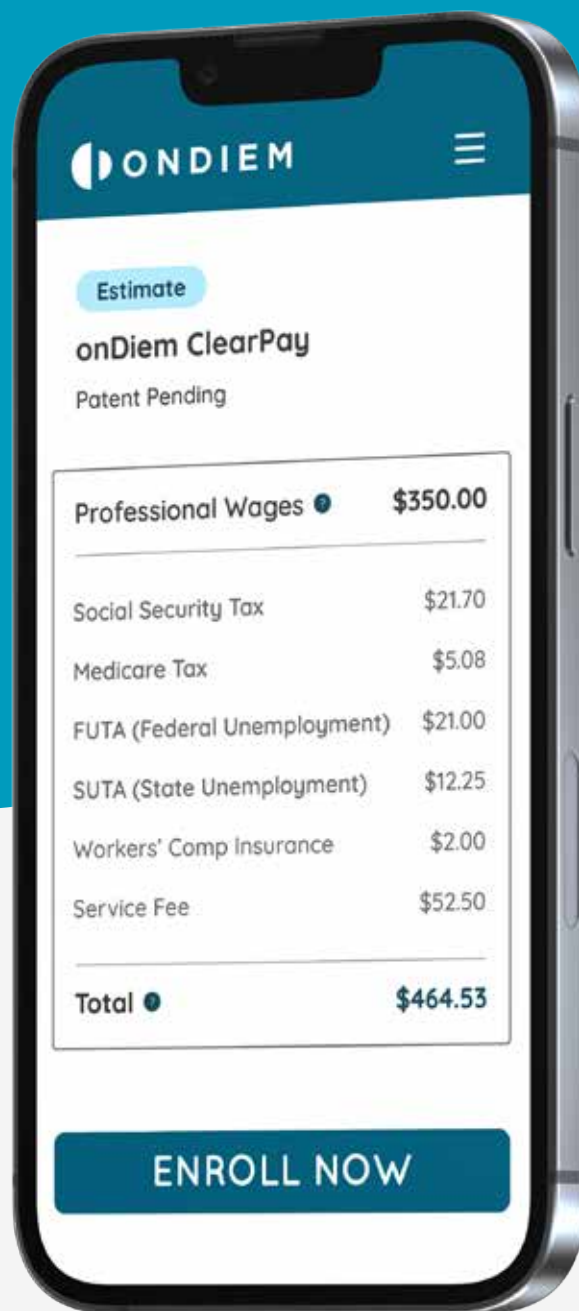
Avg. Day Temp Wages, Labor Costs + Service Fee

YOUR ROI



\$5,000

Avg return on investment for 1 temp RDH shift

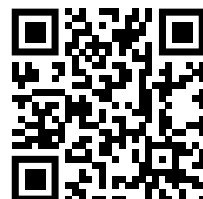


Hiring illegal 1099 temp labor puts your business and your patients at risk.

ClearPay™ eliminates the mystery of what it really costs you to hire a temp safely. With your compliance burden covered by onDiem, you can focus on maximizing the return on every staffing dollar you spend.



Visit our website to learn how transparent labor pricing can help you maximize revenue growth using affordable temporary staffing.



Trends in Group Dentistry for 2023 & Beyond

Consolidation, hiring, diversity and technology rule.

► BY PETE MERCER

Consolidation

As the dental industry continues consolidating, the competitive advantages of multi-location DSOs will continue to put pressure on single-location dental operations.

“This is the scenario that nobody wanted to talk about,” said Dr. Eric Roman, a partner with DEO and past CEO and co-founder of CarolinasDentist. “We thought it would cap out at maybe 25%, but look at where consolidation is now.”

“We’re talking possibly 85%,” said Emmet Scott, co-founder and CEO of

Community Dental Partners. “Defining consolidation has become more flexible, and also more complicated.”

There are now a limitless number of consolidation options, combining different types of deal structures, different buyers, different operating plans and different brand strategies.

“There are no rules,” Dr. Roman said. “It used to be a more binary option, but not today. It’s almost like you can use your imagination and choose your own adventure with consolidation.”

Today’s associates have expectations that the DSO will be in charge of human resources, billing and scheduling, and the moment an associate is onboarded, a dental practice becomes a DSO. They want support and they are a DSO’s lifeblood.

“Practically no graduating dental students today are starting their own practice directly out of school,” said Dr. Roman. “Think about that. They’re all becoming associates.”

Hiring

Hiring is getting harder due to generational changes and a declining birth rate in the U.S.

“Dental students’ mental load is high,” Scott said. “And some deans at these dental schools have told me it’s so high that their ability to consume information has dropped.”

“And they’re moving up Maslow’s hierarchy of needs faster than ever,” Dr. Roman added. “They see the wealth inside the country, as well as the amount of opportunity, and they ask ‘why should I work for you?’ and ‘what’s in it for me’ and ‘what’s the mission behind your business?’ You better have a great answer.”

Dr. Roman says this makes it more challenging for DSOs. “This was coming, but the pandemic pushed it over the tipping point,” he said. “We ask a lot of people inside






denticon
PRACTICE MANAGEMENT SOFTWARE

 **Legwork**
PATIENT ACQUISITION SOFTWARE

apteryx
DIGITAL IMAGING SOFTWARE



Cloud-based 
software solutions
to help make
the practice of
dentistry easier.



LEARN HOW YOU CAN
GROW YOUR PRACTICE AT:
www.planetdds.com

our businesses. Working 40 hours a week is a base expectation for many leaders and executives in the industry. And then we set similar expectations on our team members...but they're not vested."

The generational behavior shift pushes associates to leave for different experiences. "The pandemic hit like a ton of bricks," Dr. Roman said. "But there's hope. They're telling us we weren't doing a great job and that our career experience needs to be different in the dental industry."

Training resources need to be upgraded internally. Teams need to see systems and processes in place to lessen the training burden on the associates.

"People with skills, degrees and licenses left the industry during the pandemic," Dr. Roman added. "Over 5,000 hygienists left the industry. It will take years to train and replace the people lost, but training will come from us, as well as the companies and organizations supporting DSOs."

Diversity

Replacing those skilled associates and team members includes welcoming new dental school graduates and over 50% of them are women.

"This is a permanent generational shift. It isn't simply a temporary moment in time. It's the future," Scott said.

"Whether you're intentional about it or not, your business takes on a certain persona," Dr. Roman added. "Early in my career I operated a dental business with 13 young, male dentists. It looked more like a fraternity than a representation

of our true provider population. How effective would that company look today when recruiting female dental students? Your company needs to be welcoming to all if you want to thrive in the new environment."

Dr. Roman says if a practice is having trouble hiring it's possible that something is wrong with its culture and that might be preventing it from accessing 50% of available dentists.

"Your associates are just like your patients," he said. "They are all your customers, and your own dentists are your first customers. Take the marketing concepts you've honed to attract your patients and use them for your associates. You can attract more team members this way."

Technology

Consumer expectations for the dental experience continue to rise. Technology is the rule, not the exception, from both staff and patients.

"Consider how Amazon has trained consumers. Your patients subversively expect you to be available with the same level of convenience," Dr. Roman said. "And consumers are being trained that they can have what they want without the interacting with another human being."

Online reviews, for example, were a good thing to have in the past, he added. "But it's no longer a choice today. You're losing patients each day if you don't have excellent, plentiful online reviews."

Artificial intelligence and technological integration is also a hot

topic. In the past and when implemented ineffectively, technological efficiencies led team members to occasionally feel nervous about their jobs. Today, these integrations must empower them to have a better life in our businesses.

"We just don't have the workforce we once did, but we still have all the patients" Dr. Roman said. "We need tech to keep it all running. Things that were once outside the realm of consideration may become common. Consider automated scheduling; phone calls answered by bots; texts sent by bots. It lifts the repetitive mental burden off of the team members so they can focus on the things they are uniquely capable of doing."

Further, Dr. Roman believes that prospective changes to financial markets and interest rates will only accelerate the pace of technology adoption. Digitization of charts was only the first phase.

He says there will be more interaction and consolidation amongst technology solutions and that those changes will benefit the industry as a whole, not just the DSOs. "One big change we're seeing is where the DSO once had to build a customized solution for itself, there will now be better off-the-shelf solutions."

"We're looking at our sponsors and vendors as an external team to help address these needs," Scott added. "We have to create a better relationship with payors where they understand that providers need a certain amount of compensation in order to solve these problems – and to take care of patients and get alignment." ■

**JOIN
US!**

CANCUN
MEXICO October 26-29

FOR THE **2022 BREATHING WELLNESS CONFERENCE!**

THE **Vivos**
INSTITUTE™

Earn 16.5 CE Credits

Learn more about the innovative and life-changing treatments for patients suffering from sleep-disordered breathing.

Golf Tournament

Enjoy our beachside golf tournament.

Celebrate!

Celebrate Dia de los Muertos with dinner, dancing, and fun on Friday night!

FEATURED SPEAKERS



Matthew Walker, PhD



Jim Hunter



Ben Miraglia, DDS



Don't Miss Out on This Doctor-Exclusive Event!

Use the promo code **DEOCANCUN**
to attend the conference for FREE* for qualifying doctors!
thevivosinstitute.com/bwc22/

*Preregistration with a \$2 nonrefundable processing fee is required up front. In the event you are a "no call, no show" to the event and do not cancel within 14 days of the event, your card will be charged/debited \$2,795 as a set cancellation fee. If you cancel between September 12 and October 12, you will be charged 50% or \$1,398. If you cancel between August 12 and September 11, you will be charged 25% or \$699. There are no penalties for canceling before August 12. Hotel and airfare are not included.

The only patient finance partner you need.

A simple, single-application credit solution.

There's no longer a need for providers to turn away patients, offer multiple finance solutions, or try to manage in-house payment plans. PrimaHealth Credit is a completely customizable financing solution that finally gives providers exactly what they need: one application for prime and subprime borrowers with instant decisions, high approvals, and real-time reports.



- ✓ Most patients are approved.
- ✓ One application for prime and subprime.
- ✓ On-demand, real-time reports.
- ✓ Enrollment is easy.

Go to **PrimaHealthCredit.com** to schedule a demo!



Dashboard Reports **▼** Payment Calculator Help Center

Key Metrics Report

LOCATION	TREATMENT TYPE	PROGRAM TYPE	FROM	TO
All ▼	All ▼	All ▼	12/26/2021	1/27/2022

FUNDED LOANS AMOUNT
\$2,203,650

FUNDED LOANS
897

AVG. LOAN SIZE
\$2,456

APPROVAL RATE
90%

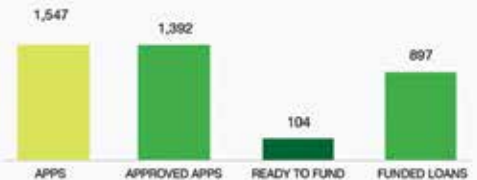
ACTIVE OFFICES



ACTIVE USERS



CONVERSION FLOW



More care, for more people.

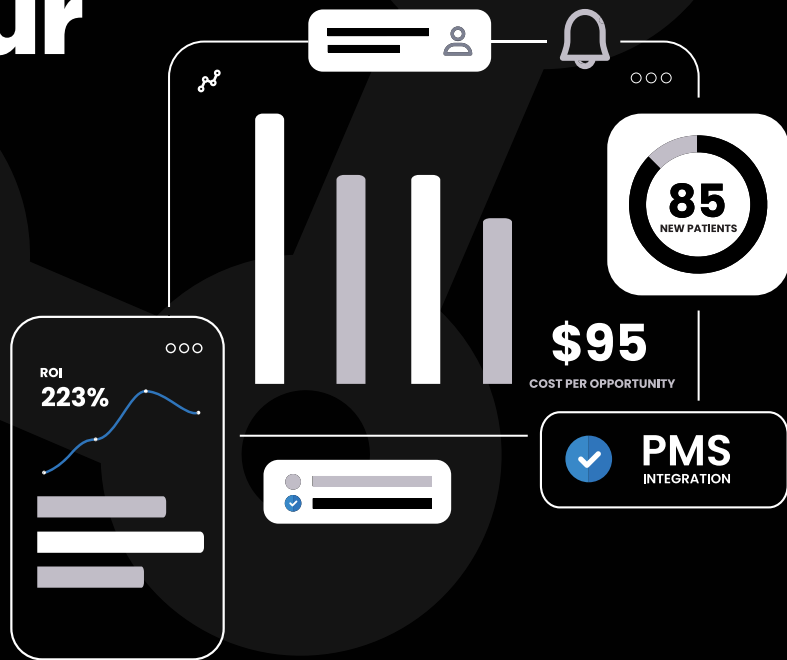


Know Your Numbers

With the right marketing technology in place, you'll know exactly what's driving your success.



► BY GARY BIRD, CEO,
SMC NATIONAL



The number one topic on every businessperson's mind is, what is this economy going to do? Is the economy going to dip and get far worse than it is right now? Is the economy going to improve? Or will the economy remain steady in the direction that we've been going?

Obviously, if you've been in business for any amount of time, you are preparing for the worst and hoping for the best.

Tools for the future

One of the things that you can do to prepare for the future is to invest in your technology and infrastructure for the marketing of your DSO.

Most dental offices have marketing assets and structure but usually don't know what their marketing is producing. It's just a guessing game. The average dental office just takes their total marketing budget

and divides it by the total number of new patients that they get and say, 'That's our cost per acquisition.'

The problem is, that won't give you an accurate picture of your marketing results. You're mixing in patient referrals, doctor referrals, and drive-bys with the marketing patients. With all those additional variables, you won't actually know what your digital marketing is producing for you.

It's critical to invest in a technology infrastructure that will be able to tell you:

1. How much it costs you to create an opportunity
2. How much it costs you to drive that opportunity through the door

When you have these two numbers, you're truly able to drive marketing. And if the economy was to take a massive dip, you would be able to know how much it's going to cost you to fill the gap of what you potentially lose from a revenue standpoint or from a marketing standpoint.

Go from marketing expert, to
DENTAL marketing expert!



BROUGHT TO YOU BY SMC +
FISCHER'S PROFESSIONAL GROUP

LIMITED AVAILABILITY
REGISTER TODAY

DentalMarketingManager.com



ROI

Now, the other thing that your technology needs to be able to tell you is what's your return on investment? You should be able to see what your ROI (return-on-investment) and LTV (life-time-value) are for all your digital marketing. However, if you're aggregating all your new patient data together, and you're mixing in patient referrals with your marketing, you're not going to be able to understand what's driving your marketing success, and you're going to continue to blindly throw marketing dollars away into the wind because it looks like your ROI and LTV is winning, but in fact you are no idea.

That might be okay short-term. But look at what happened to the economy during the early days of the pandemic. After the shutdowns and shelter-in-place mandates were lifted, dental offices were left with empty chairs and open calendars.

There were a lot of offices that threw marketing money at the problem, and nothing happened. The reason nothing happened was because they had no infrastructure built for their marketing. They had no idea what was providing results and what wasn't. And when they went to turn that engine on, it wasn't there for them.

At SMC, we track and measure each step of your new patient journey, then improve any aspect that needs fixing. Here are five areas you should monitor in order to boost your marketing ROI.

1 Business operations

The first step to improving your marketing process doesn't involve

your marketing process. Poorly run operations can be a huge turn-off to patients. Perhaps your schedulers, marketing team, and hygienists are not communicating with each other about how many patients the latter group can handle. You'll end up overbooking and you'll quickly end up with a bunch of frustrated former patients, bad Google reviews, and a burned-out staff.

2 Unanswered calls

Talk about low-hanging fruit. The average dental practice simply doesn't answer 35% of all phone calls, which means you're probably leaving a lot of business on the table. By tracking your unanswered call rate and then putting systems in place to drive that number downward, you may end up increasing your pool of new patient leads by almost 50%.

3 Marketing phone conversions

Of the marketing phone calls that practices do answer, they only convert an average of only 50%. That means that every time a new patient lead picks up the phone to call you, your total chance of booking them could be less than half. Once you've got a system to make sure that all your calls get answered, you may need to go further. If your call team isn't converting at least 80%, they need more tools to help them move leads from no or maybe to yes.

4 Marketing no-shows

About 25% of marketing patients make an initial appointment and then don't show up. But there's a

lot you can do to bring more scheduled appointments into your waiting room. Coaching can help, as can implementing reminder systems like emails, texts, or a phone call 24 hours before a new patient appointment. Availability within 72 hours of the new patient call is your best bet to decrease your marketing patient no show rate. Keep a close eye on your no-show rate.

5 Recare rate

Once you've done that initial exam and cleaning on a new patient, do they come back again in 6 months for their next hygiene appointment? For too many dentists, the answer is no. The average recare rate is only 30% for marketing patients (We know you think it's higher, but it's not. Your organizational recare rate is not a practical benchmark for your marketing recare rate. You must track marketing alone.)

That's shockingly low, especially considering how much time and money you've spent getting that initial new patient appointment scheduled. So track your recare rate religiously.

The best strategy for DSOs both now and in the future is get invest in technology that can track your cost per lead, cost per acquisition, ROI and your lifetime value. With those data points in place, you will see what's coming from your marketing – not from what's coming from ALL new patients, or what's coming for all of your patients – but from your marketing.

If you don't want to optimize your marketing alone, we'd love to help. Visit SMCnational.com to learn more. ■



Partner With Your Practice Technology

► BY JILL NESBITT, MBA, STRATEGIC CUSTOMER SUCCESS MANAGER, HENRY SCHEIN ONE

This year, I was asked to join a technology panel at the 2022 DEO Growth Summit in Arizona. Just walking through the summit, it was easy to see there is an explosion of new technology solutions for dentistry. On one hand, this is amazing! And on the other, it becomes like the cereal aisle in the grocery store — overflowing with so many choices it can lead to analysis paralysis. This got me thinking about how DSOs select practice technology and what I've seen from my work with practices across the country.

When I talk with DSO leaders about the technology in their practices, the conversation quickly moves past specific features and instead targets the overall value these solutions bring and the impact of increased efficiency. Leaders in growing multilocation groups are tight on time and need ways to drive EBITDA. Oftentimes, adding technology is an opportunity to increase the efficiencies of their team and extend management through consistent workflows across locations.

I repeatedly see that practice owners often need more than just great technology. They need a partner that can help drive value, and that means looking at the overall experience of working with a technology vendor: implementations, training, data management, speed, support and customer success. Yes, they want software that works, but they also need a technology partner who can make their jobs — and lives — more efficient, productive and easier.

When looking for a practice technology, dental leaders are asking: How will it impact my team, my patients and the value of our DSO? I encourage adopting dental technology that can help your organization in numerous areas, including:

- **Standardizing workflows.** Look for a professionally led implementation process that integrates a solution to standardize workflows across your organization to save time and align locations.
- **Centralizing data.** Look for a cloud-based system that reports across locations so you can share data across your organization.
- **Increasing efficiency.** Look for built-in task automation to reduce or eliminate repetitive tasks so your team can work smarter.
- **Improving patient experience.** Consider how patients will interact with online scheduling, payment and treatment plans — and look how to integrate them.
- **Growing and scaling.** Consider how quickly and easily your team can learn the new system. Additionally, look for a solution that doesn't require new expensive equipment and makes adding new locations easy.
- **Increasing EBITDA value.** Identify the highest value features in the software and implement them! The DSO that invests the time to set up, train and implement the top features enjoys the highest level of efficiency and revenue growth opportunities.

Dentrix Ascend cloud-based practice management software focuses on delivering the Henry Schein One experience, bringing together all the resources that best support practices for a dependable experience. Dentrix Ascend keeps all your data in one place so you can standardize processes while increasing your efficiency. It's easy to use, grows with you and can help to increase the EBITDA of your DSO or group.

What you do is incredibly hard and time-consuming. Henry Schein One can be your trusted partner to support your business goals. Learn more by requesting a consultation at DentrixAscend.com/PracticeSuccess. ■



Jill Nesbitt, MBA, is a strategic customer success manager with Henry Schein One.



The Future of Dental

How forward-thinking DSOs will survive the rapid consolidation of the dental industry. ► BY TAB32



The dental industry in 2022 is facing a new set of challenges than their predecessors. Labor costs are rising, patients are expecting more from their providers and staff shortages mean practices have to do more on less. Forward-thinking DSOs are now looking to technology for increased operational efficiency, BI analysis, and scale. What they are finding is that the industry's technology landscape is limited as most legacy practice management systems are not built to address the needs of industry consolidation. These include access to data (not just dashboards), GAAP compliance, decreased operational costs, increased efficiencies, and accessible patient engagement tools.

AI is a part of dentistry's future, but it isn't a silver bullet. While we predict AI will have an impact on the industry, it will have to be properly implemented in order to bring the sweeping changes and other promises being made today. This requires a platform technology capable of executing. It is then that DSOs will be able to future-proof their business and be at the leading edge of dentistry for years to come.

Platform architecture is the key to future growth

Microsoft Teams vs. Slack is a great modern example of what it means to create a platform technology. Microsoft had the opportunity to acquire Slack but opted out because they saw the value of creating a platform architecture within their existing technology stack. As a result, Microsoft Teams has scaled significantly faster than Slack.

Until recently, most practice management systems were server-based. Under the desk, installed

on aging hardware, these systems were limited for several reasons. Routine maintenance, costly upgrades, and out-of-date equipment limit functionality and reduce accessibility. The future of dental is in a cloud-based platform architecture that is more reliable, secure, and constantly evolving to meet the needs of modern dental practices. By getting away from black box systems that can't communicate with one another, practices streamline current operations and prepare for future developments.

Built on the Google Cloud Platform, tab32 is single sign-on ready with Google Auth and Microsoft Azure. Our platform untethered data and helps modernize practice efficiency and interoperability.

It starts with a modern patient workflow

Currently, many DSOs are on several different practice management softwares and third-party vendors. Only recently have legacy companies began to introduce items like 2-way text and patient communication. Because of the limitation of first- and second-generation technology stacks these innovations take years to develop. Have you ever wondered why the UI in some softwares looks so dated? It would require a complete rewrite which is costly and takes time.

Rapid practice acquisition creates massive technology debt for up-and-coming DSOs. The myriad of software solutions hinders efforts of centralization, resulting in disjointed

data analytics and old tech interrupting the patient experience.

A DSO might have one patient with several duplicate records and radiographs on different practice management systems. Their workflows are often strung together with tedious time consuming administrative processes. This forces patients to re-enter the information every time they visit a new location.

Economists predict an impending recession (CNBC, 2022)* which is when patients historically defer dental work. Like retail, it will be important that dentists look to the future to provide seamless patient experiences coupled with strong preventative education and engagement.

Data, data, data

When we talk about the modernization of the dental industry, the biggest roadblock to integrating new technology at scale is data. Despite the volume of data that dentists generate – radiographs, patient records, etc. – many lack the systems to ensure proper formatting, storage, and accessibility of data. You simply aren't going to get data dumps from the clearing house or your communication vendor. The technology isn't there and is too expensive to build after.

When it comes to advances like AI, inconsistent data cannot be used to train machine learning tools. Machine learning requires large amounts of data for accuracy and innovation.

tab32's cloud-based approach to platform development was built to address these challenges. By getting

data out from under the desk of dentists and into a robust cloud-based system, it can be saved, evaluated, and acted on more consistently.

Integrated into the tab32 platform in 2020, our cloud-based open data warehouse platform allows practices to reduce the cost of data management while vastly improving their access to reporting and business intelligence (BI). And it's machine learning ready.

Prepare for the opportunities offered by AI & machine learning

tab32's revolutionary approach to data standardization has resulted in more than 100 million images being migrated to the cloud from every source system in the industry, allowing us to automate and streamline communication, standardize care across multiple locations, and ensure your practice is ready for the implementation of increasingly advanced machine learning tools.

The future of dentistry is on the horizon

A revolution is coming to the dental industry. By transitioning to the cloud, standardizing your data, implementing a platform that supports all of your practice activities, and preparing for the next wave of smarter, automated systems, you will be primed for that revolution. tab32 is helping practices get there, and we are committed to being at the cutting edge of developing the next generation of tools and systems to support your success. ■

*Winters, M., 2022. 'Ugly' inflation numbers make a recession more likely in 2022, economist says. [online] www.cnbc.com. Available at: www.cnbc.com/2022/07/20/economists-chance-of-a-2022-recession-is-rising-with-inflation.html



Merging Technology with Remote Teams

► BY J.W. OLIVER JR., SUPPORTDDS.COM



Utilization of technology and artificial intelligence continues to accelerate at a rapid pace in the dental industry. This trend will continue with the objective to solve problems while decreasing human intervention. Most technology is cost effective and beneficial; however, we have seen that it is not 100% automated and requires analytical analysis and manual input of required variables to acquire the desired results. Complimenting an organization's technology platforms can be successfully supported and augmented with remote/virtual teams to maximize the results and ROI.

Today, multiple platforms are being leveraged in most dental offices and organizations. These can be quite cumbersome to your existing team, requiring the adequate amount of time and resources to evaluate the data and to implement the “*plan of action*”. By utilizing remote/virtual teams, you can manage multiple plat-

forms without having any (or at least as many) “slip through the cracks”.

The current state of the economy and mitigation of recessionary environments, allow for the reduction in operational costs while increasing your overall performance. This can allow a margin for growth in an otherwise “unkind” environment. Savings with Support DDS have historically and consistently proven to range from 55-70%.

Efficiency with your technology and operational systems can have profound and life-changing effects on your team. These benefits have shown to include:

- Elevation of your team as they perform the roles they were hired for and have the maximum ROI for your group or practice.
- Leveraging allows for growth and expansion during otherwise turbulent environments.

- Remote/Virtual teams can be instrumental in assisting with developing, updating and documenting your operational processes.
- Detailed, accurate and timely reporting.

There are a variety of areas to consider when deciding to leverage remote/virtual teams. Support DDS has been successful with implementation of teams for a variety of AI platforms and the traditional positions. You may have dedicated teams focused on one area, or one team member with multiple platform oversight. Some, but not all are:

- Excellence in phone skills/missed calls with *Patient Prism* AI technology
- Director of First Impressions
- Scheduling of new patients
- Insurance Verifications
- In-House membership plans like *Dental HQ*
- Re-Care systems
- Revenue Cycle Management A.I. technology like *Abella*
- Bookkeeping/Accounting service like *Pro-Fi 20/20*
- IT help desk and project management
- Digital Marketing/social media
- Reviews and online performance like *Unify Dental*

Bottom line, AI and technology are amazing and will even get better. Complimenting with remote/virtual teams can assist with maximizing those tools and most importantly, allowing your team to FOCUS on what's important ...

Your guest (patient)!

Elevate your team, maximize your tools, and reduce the cost while GROWing! ■



Modernize Your DSO: Patient AR Technology with Growth in Mind

Did you know that the average dental practice is carrying over \$50K in aging patient AR and that a mid-size DSO carries over \$1M?

Automating your patient AR invoicing and payment process is key to providing a better patient experience and income growth. ▶ BY ABELLA AR

When was the last time your patient billing process got an upgrade? Money owed from past due balances is revenue that you've earned but just haven't had any luck collecting. The task of managing large, layered patient AR balances can be daunting without a scalable solution. DSOs know that offering a hi-tech and mobile-friendly experience to patients extends beyond the office visit. One of the largest DSOs, Peak Dental Services, implemented Abella® to enhance their patient billing process and payment experience. Peak Dental CEO, AJ Peak, recently presented at Dykema and shared their impressive results.



"I was pretty skeptical about the patient experience. We ended up jumping in and it's been wildly successful."

— A.J. Peak, CEO,
Peak Dental Services



Upgrading your patient experience

Why do conventional billing methods fall short? Mailing out paper statements is time-consuming and is proven to be a less effective form of communication. Peak Dental improved their billing experience by providing automated invoicing via text and email with options to pay instantly. This not only streamlined their operations and team time allocation but delivered the experience their patients were expecting.



The automated patient A/R workflow

Abella works for your DSO in several ways. The first and fastest way is what we call the Aging AR Clean-up. Simply put, this is money earned in the first 1-4 weeks on 90+ days past due balances.

AJ Peak (CEO, Peak Dental) mentions, **"40% of the balances were paid within 7 days, meaning it's extremely quick. We can't even get statements out that fast. It was quite impressive."**

After this rapid lump-sum surge of collections, your accounts receivable go into **AR management cruise control**. Abella fully integrates with your practice management software, scans for patients who owe money and don't have an open insurance claim (thereby avoiding incorrect billing), then automatically begins invoicing. This maintenance process is critical to eliminating the challenges of managing patient AR and preventing the buildup of past-due balances from occurring.

Let's take a closer look at how well Abella is working for another DSO. In less than two years of implementing Abella, North American Dental Group (NADG) had **81K patients** pay and collected **\$9.5M in patient AR!**

The final step in optimizing the patient AR process is activating automated payment plan management which allows for short-term payment plans up to 4 months at the time of scheduling. In addition to automating your patient AR workflow, Abella can perform as a payment solution, erasing the need to work any future patient balances.

Upgrade your patient billing technology today to give your patients a better payment experience and grow your DSO. To learn more or get started with Abella, visit AbellaAR.com. ■



It may be time for an AR cleanup

Did you know that an average mid-size DSO has over \$1MM in aging patient AR? That's a lot of revenue just sitting there waiting to be collected.

FREE TRIAL
NO OBLIGATION
90+ DAY PATIENT AR
CLEANUP

3 WAYS

*Abella automates your
patient AR collections process*

1 Aging AR clean-up

(90+ days past due)

2 Ongoing AR maintenance

(Abella looks for patients in your PMS
and sends invoices when needed)

3 Automated plan management

(Offer short-term payment plans)

**LET'S GET
YOU PAID**



Trusted by:

ADVANCED
Dental Brands

NORTH AMERICAN
DENTAL GROUP

MB2DENTAL

PEAK DENTAL
SERVICES

JEFFERSON
DENTAL CARE

KIDS
DENTAL BRANDS

AbellaARTM
Patient Payments. Faster. Easier.

AbellaAR.com | 866.Abella4U

WE ♥ A/R



3 Ways to Prevent Embezzlement With Your Membership Plan

► BY BRETT WELLS, DDS, FOUNDER, DENTALHQ

Dental practices have long been victim to employee embezzlement, an astonishingly common practice across the industry.

This happens most often due to unsupervised balancing of the books, or incomplete supervision, via a practice's patient management system (PMS). Employees can steal directly from the daily deposit or can mischaracterize payment types to disguise theft.

Recently membership plans have developed a reputation for being more open to employee embezzlement. While technology is powerful for automating financial aspects of the dental business, these technologies, including membership plan management software and patient management systems, can leave your practice vulnerable to employee embezzlement.

However, dental professionals can build systems to safeguard their membership plan – and their dental practice – from employee embezzlement. The following three best practices can help.

1 Create a unique membership plan and fee schedule

Create a new fee schedule in your PMS called “Membership Plan,” or however you want to designate patients enrolled in your membership

plan. Add a membership plan to your PMS to match to your plan's fee schedule. The plan's included services should be entered as \$0 dollars. The non-included services should be entered at the discounted rate, as applicable.

This best practice reduces the need for manual adjustments, when employee embezzlement is more likely to occur. In other words, the more manual adjustments needed, the more likely embezzlement can occur.

2 Assign each member to your membership plan in the PMS and update regularly

This is done by assigning patients as members to the correct Membership Plan in your PMS. Patient's membership status should be checked monthly as well as during appointment verification prior to their appointment. If a patient is no longer an active member on your plan, they should be removed from the membership plan fee schedule assignment. This same process applies to adding new member patients as well.

Cross-reference your membership plan software or in-house database with your PMS for accuracy.

The point of this best practice is to prevent non-members from receiving free or discounted services by accident. Such an occurrence

may not technically be categorized as embezzlement, but this is still another way your dental practice can lose money that can be avoided.

3 Limit payment types to third-party transactions

Accepting cash, checks, and credit card payments in-office can leave your practice open to risk of fraud and embezzlement. Limit payments accepted for membership plans to credit card/ACH payments through verified and trusted third-party software.

If in-office payments must be taken, then we strongly recommend implementing significant oversight throughout the process. Try to limit having multiple points of entry for payments, as this can create obscurity that can open you up to embezzlement.

Follow these best practices to set up your membership plan for success – not theft.

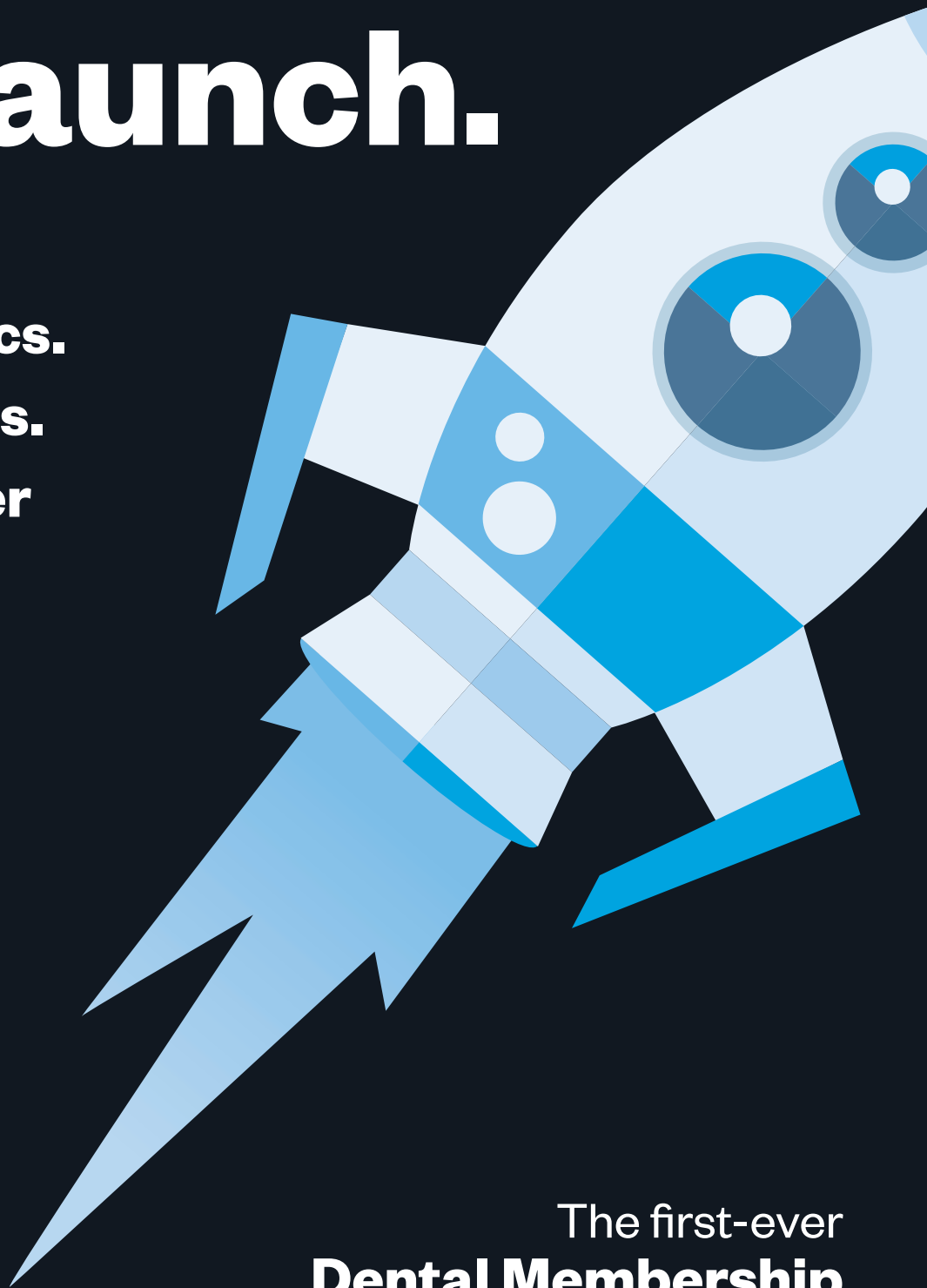
We've created an Embezzlement Prevention Guide with two more Best Practices and further detail to help you best protect your practice and your membership plan – download the guide by visiting welcome.dentalhq.com/prevent-embezzlement. Also, if you'd like to discuss how your practice can run an effective membership plan while protecting yourself from embezzlement, I'd love to talk to you. Contact me at brett.wells@dentalhq.com. ■

Cleared to (re-)launch.

Better analytics.

Better features.

**Better member
management.**



The first-ever
**Dental Membership
Growth Platform.**



DENTAL HQ



Patients that Fit Your Practice

How dental group practices can find patients who fit their unique needs. ▶ BY DENTAL INTELLIGENCE

For several years now, Dental Intelligence has regularly received calls from customers asking for help with some variation of the following:

- “We’re trying to find all of our patients that are covered by XYZ Insurance. Can you help us?”
- “Is there any way to ONLY see the patients we’ve presented crowns to in the last three months?”
- “We want to print out a report showing us every patient we’ve presented over \$500 in treatment to in the last six months who still have insurance dollars available. Is that possible?”



All of those questions point to one shared desire – practices want to find the right kind of patients. Is there such a thing? Are some patients “better” than other patients? When it comes to achieving your practice’s goals, the answer is a resounding yes. So how can you find and schedule more of the right kind of patients?

Dental Intelligence’s Patient Finder was built to solve this exact problem. It allows practices to quickly and efficiently find patients who fit their unique needs. With 27 filter options, you can create customized lists

that fit existing patients into empty appointment slots. Most often, the best targets will be patients who have:

- Unscheduled treatment
- Remaining insurance dollars
- A history of on-time payments
- A high treatment acceptance rate
- No history of cancellations or no-shows

Or whatever else is most important to your practice.

What is your current method for identifying these kinds of patients and scheduling them for treatment? If you’re anything like most of the wonderful dentists we work with,

your answer might be something like “We print out the lists of all these patients and try to make contact with them.” That’s great news!

Does this approach allow you to customize your list by criteria important to you and to these patients? Does your printed-list (or equivalent) system enable you to prioritize which patients should be contacted, and in which order, based on the type of dentistry you most want to provide? Also, how long does it take for you to generate such a list, and how inclusive is the data you are drawing from?

Here’s the great news: You are already working hard, every day, to try and get as many of these patients as possible back onto the schedule. Doesn’t it make sense to use a tool that can significantly reduce the amount of time you spend doing so? And wouldn’t you also want to ensure that you are capturing every possible search criterion when identifying the patients most in need of care?

Patient Finder is changing the way that thousands of practices practice dentistry. Before now, it was literally impossible to do an efficient AND comprehensive search of your practice management software for the patients and procedures you were interested in. But now, you can absolutely do so, quickly and easily.

To see it in action for yourself, schedule a demo or visit us online at dentalintel.com. ■



“About a year ago we were producing about \$26 Million per year. **15 months later we've had a \$10 Million growth.**”



Insight and tools for every level of the organization

Accurate, Actionable Data

- Individual & Multi-location Reporting
- Provider Pulse
- Call Insight
- Cloud-based Access
- Smart Schedule
- Patient Finder
- Follow Ups

Automation that Scales

- Forms & Consents
- Reminders & Confirmations
- Automated Recalls
- Virtual Check-In
- Payments
- Online Scheduling
- Patient Loyalty Program

Improved Visibility and Communication

- Morning Huddle
- Team Chat
- LiveOps®
- Mobile App
- 2-Way Communication
- Mass Communication
- Voicemail Drops

www.dentalintel.com/enterprise



Fast Forward: How Patient Behavior is Driving Technology Adoption in Dentistry

► BY SIMPLIFEYE

Technology that improves patient experience has gone from “nice to have” to “need to have” practically overnight. Eighty percent of Americans consider speed, convenience, knowledgeable help, and friendly service key to a positive experience¹. Not surprisingly patients are willing to pay a premium for convenience and are more loyal to companies that deliver high-quality experiences. So how do you deliver an exceptional patient experience when you’re already understaffed and overwhelmed? Technology makes it easier than you think.

Speed of service is critical. Our increasingly digitized lifestyle is making attention spans shorter than ever before. Microsoft did a study that showed that the average adult’s attention span has declined from 12 seconds to just eight! Patients are searching online for dentists at night or on the weekend when they have free time, not during the business day. You need to have a way to answer their questions 24/7. When it

comes to appointment scheduling, simply having a form on your website is not enough. This is where you need to embrace technology.

Adding managed live chat to your website offers the ability for patients to get their questions answered any time of the day or night. Forty-two percent of customers prefer online chat as their communication method². By having trained experts with extensive dental knowledge and customer service skills representing your practice, you can deliver an unparalleled customer experience around the clock without any burden to your front desk team.

Dr. Yalice M. Cardona, owner of Kreative Dental Care shared, “I was losing a lot of potential patients because people don’t want to pick up the phone. Now I can capture those patients through chat.” When practices implement live chat on their website, they’re often surprised to find that their existing patients are

also chatting, even during office hours, because it’s faster and more convenient than having a phone conversation with the front desk.

Adopting self-service solutions like live chat and direct scheduling drives cost savings and operational efficiencies. By encouraging customers to seek answers to their questions online, practices stand to reduce bogging down the front desk with phone calls, emails, and voicemails, enabling them to focus on more complex issues and deliver better care. Rather than relying entirely on the front desk team that may have them waiting on hold, patients can get help anytime, anywhere.

Technology can enhance the patient experience by offering a faster response, more convenient ways to book appointments, and knowledgeable help where and when they need it. However, nothing can replace the value of the human touch. The most important benefit of technology is using it to empower your team to deliver a higher quality of care to patients that are in your practice.

Simplifeye empowers doctors by automating the business side of their practice. We do this by providing software solutions that digitize and improve existing processes that are core to many medical practices. For more information, visit <https://simplifeye.co/> ■



¹PwC. “Experience is everything: Here’s how to get it right.” PwC, 2018, <https://www.pwc.com/us/en/advisory-services/publications/consumer-intelligence-series/pwc-consumer-intelligence-series-customer-experience.pdf>. Accessed 23 August 2022.
²MacDonald, Steven. “25 Live Chat Statistics for 2021 (Backed by Unique Research).” SuperOffice CRM, 4 May 2021, <https://www.superoffice.com/blog/live-chat-statistics/>. Accessed 24 August 2022.



**“Live chat added
\$46,000 in revenue
in two months.
It’s a no-brainer.”**

GT Thiagarajah
New England Dental Group

The tech you need for today’s patient

Simplifeye makes it easier than ever for patients to schedule appointments and pay for treatment. Plus, easy-to-use dashboards provide fast access to key performance metrics.

- 24/7 Live Chat
- Automated Payments
- Text-to-Pay Invoices
- Online Scheduling
- Invite Targeted Recare
- Revenue Matchback



**SEE HOW
IT WORKS**



☎ 646-846-7467

🌐 simplifeye.com



Improving Dental Care with AI

Increased case acceptance, consistency in patient care, and confidence in comprehensive diagnostics are three key areas where dental groups benefit from AI. ▶ BY OVERJET

When it comes to using artificial intelligence to improve dental care, the possibilities are nearly endless. AI enables transformational clinical and operational improvements, enhanced patient care, automated administrative tasks, comprehensive clinical audits, and so much more.



Robert Kolts, DDS, MBA, is the Clinical Director for Overjet, an FDA-cleared AI platform that analyzes and annotates patient X-rays in real-time. He said there are three areas that resonate most with clinicians who incorporate AI into their practices: improved case acceptance, greater consistency in patient care, and a higher level of confidence in comprehensive diagnostics.

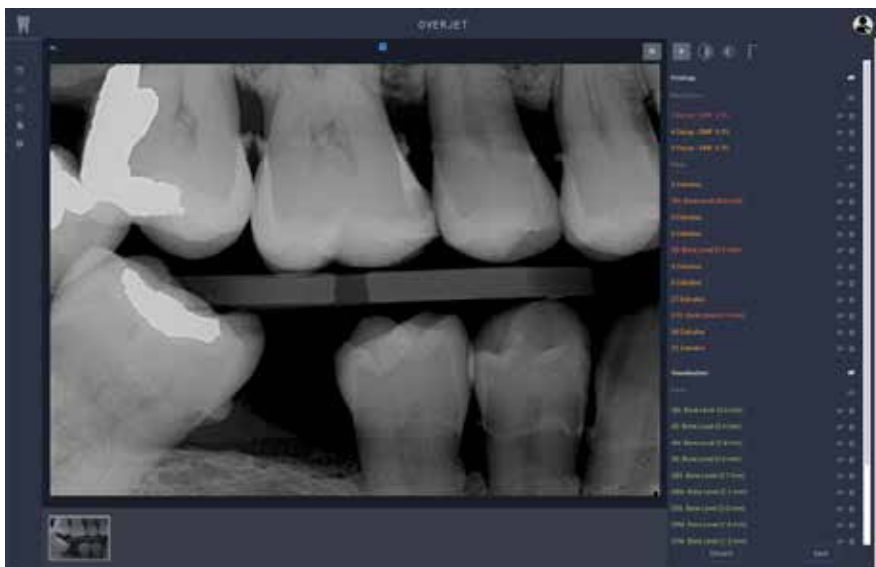
Improving case acceptance with AI

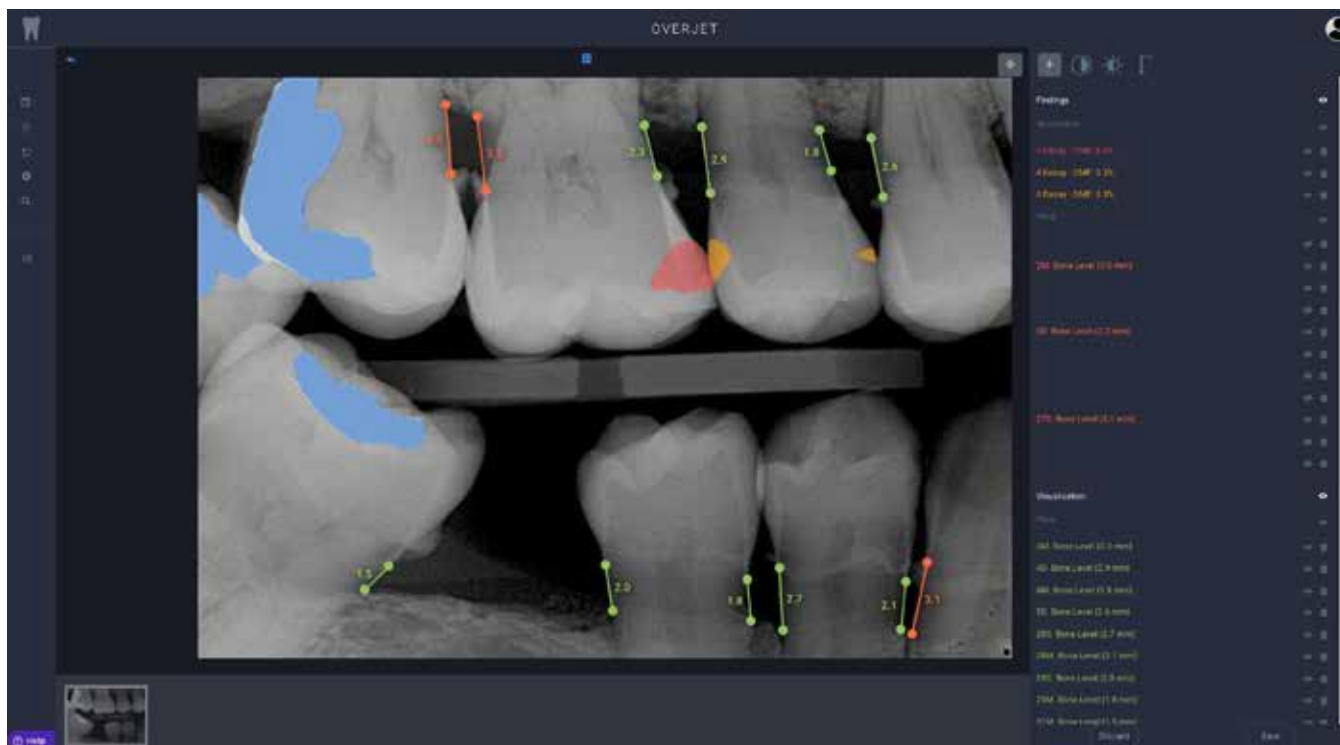
On average, new patients have a case acceptance rate of only 30%. One reason is that patients may not trust the clinician's diagnosis, or want to wait to get a second opinion.

But with AI, patients recognize the technology serves as an unbiased third party. Patients can see right on the X-ray where decay is outlined and bone loss is quantified, down to a tenth of a millimeter.

"Overjet helps overcome the lack of trust that some patients have," said Dr. Kolts. "With Overjet, we see patients accepting treatment 18-22% more often than patients who aren't shown the AI-annotated X-rays during the treatment planning and case presentation process."

Dr. Ankoo Raina, Chief Dental Officer of Jefferson Dental & Orthodontics, said, "The biggest benefit has been integrating Overjet's technology into our patient experience, building even more trust with our





patients. It also gives our providers the ability to streamline diagnostic workflows, enhance communication with patients, and improve patient outcomes.”

Enhancing consistent, comprehensive care

AI also enhances comprehensive care and the confidence level of both providers and patients.

“Overjet’s technology helps us prevent missed diagnoses, integrate providers, follow higher standards for quality care, and also make sure our providers are giving excellent oral health solutions, ensuring our patients get to keep their natural teeth for life,” said Dr. Raina.

Nationwide, more than 30% of restorative procedures go undiagnosed, and about two-thirds of

periodontal disease is undiagnosed. Overjet’s technology is a decision support tool, drawing the eye to potential oral health problems.

Data shows that doctors who use artificial intelligence will diagnose on average 28% more restorative procedures per exam than doctors who don’t. Dr. Kolts said it’s not about diagnosing more, but about diagnosing more accurately.

“Patients whose caries are diagnosed earlier, for example, have a better chance of minimally-invasive caries remineralization procedures being successful,” said Dr. Kolts.

“All of our providers, including hygiene and ortho, use the technology to take a team approach to treatment planning, improving the comprehensive experience for our patients,” said Dr. Raina.

AI-generated insights help dental groups set consistent standards of care across multiple providers and practices. That helps eliminate friction and create a better work environment.

Adam Arnette, the Chief Marketing Officer at Jefferson Dental & Orthodontics, said Overjet’s simplicity, the ability to streamline diagnostic workflows, and improved patient outcomes are a few of the reasons why he recommends the platform to other DSOs. “The deciding factor in JDO partnering with Overjet was their shared commitment to exceptional patient care.”

To learn more about how Overjet can make your practices and teams more effective and efficient throughout the continuum of care, visit overjet.com. ■



Intra-Oral Sensors Don't Need to be a Pain for DSOs

Jazz Imaging's SOLO sensor erases the complexity of sensors across multiple sites and mixed imaging software. ► BY JAZZ IMAGING

It seemed simple 25 years ago; replace film with intra-oral digital sensors and see immediate diagnostic and workflow benefits with instant images and no more chemicals. For most single practices, this meant picking a sensor with imaging software (usually from the same vendor) and, viola, let the imaging begin!

But as DSOs emerged and acquired practices with different technology, this has become much more complicated. Cost, quality, and warranty concerns have now been joined by software integration, device interoperability, and staff acceptance across multiple sites.

Practices are being bought with all manner of imaging software/sensor combinations in various states of warranty and usefulness. As those sensors die off and need replacement, this forces a decision – stay with what that particular practice has, or switch to a unified option while not forcing the location to change its imaging software. Once staff has gotten used to the workflow, the user interface, etc., changing software requires retraining and impacts production until everyone is up to speed and comfortable.

Unfortunately, most major imaging software only integrates natively with their own sensor and relies on a limited interface called TWAIN to use other sensor brands. The downsides of non-native sensors using TWAIN can be

frustrating, including reduced image quality, inability to capture into existing templates, no access to proprietary image enhancement, and having to select a TWAIN device every time you want to capture images.

With SOLO from Jazz Imaging, no tradeoff is necessary. It will behave like a native sensor in all major imaging software environments without TWAIN limitations.

DSOs struggle to manage warranty coverage and support because each sensor, when purchased, has a clock on its initial warranty and support. When a sensor dies or is damaged, someone must contact the vendor with the serial number to ascertain the level of coverage (if any) this particular sensor has before deciding how to proceed. The delays to evaluate and receive a replacement can slow production. Jazz Imaging has put an end to that with lifetime warranty and support never before seen for sensors. DSOs no longer need to manage warranty and support coverage with Jazz Imaging.

Until now, DSOs had to choose between staying with the expensive, large sensor companies to maintain quality and software integration or selecting a marketing company that bought their sensors from Asia and put their name on them. With Jazz Imaging, no tradeoff is required. Jazz Imaging founders developed DEXIS and Gendex, manufacture SOLO in San Jose, California, and only sell directly to customers with no middlemen markups. Jazz Imaging recently received 510k approval for a new sensor and guarantees premium quality that generic sensor resellers can't match. Premium image quality and seamless integration with all major imaging software (NO TWAIN) can be found with SOLO from Jazz Imaging. ■



JAZZ IMAGING

The perfect replacement sensor



- Lifetime warranty & support included
- Made in the USA - buy direct
- New premium CMOS sensor design
- Purchase or subscribe
- Integrates w/o TWAIN in all major software



"I replaced Schick with Jazz SOLO a few years ago and never looked back. We love the SOLO sensor, it's more comfortable and works just like Schick all the imaging software we have in our different locations. The low upfront cost allowed me to add all the sensors I needed to help my staff. Plus, we have lifetime warranty and support, so I don't have surprise costs. I highly recommend the SOLO sensor for DSOs who are looking to add quality sensors with seamless integration that are cash flow friendly."

Sean Tomalty D.M.D. Owner Ekos Dental Group



Exclusively available at www.jazzimaging.com
(567) 234-JAZZ



AI: Solving Preventable Revenue Loss

► BY ZENTIST

Rapid growth is a good problem to have. However, it pays to remember increased patient volume equals an increased administrative workload – and ballooning accounts receivable when staff can't keep pace.

When it comes to dental insurance claim denials, revenue cycle management (RCM) staff can find themselves mired in a time-consuming appeals process or worse, leaving money on the table altogether in the form of premature claim closures. Growing DSOs may be forced to hire more hands and then find the time to train them on claims processes which vary by payer and are becoming increasingly complex.

A 2016 Change Healthcare study found 63% of claims were recoverable but costing on average \$118 per appeal to pursue. A denial rate of 4% or higher is simply unsustainable. At that point, remediation results in a loss. The fix will cost more than what can be

recovered. It is an especially thorny problem when spread throughout a multi-location environment.

Moreover, according to that same Change Healthcare study, 86% of denials may be avoidable altogether. Revenue is not only needlessly delayed but practices are incurring additional expense when they do backtrack to recover it. Administrative time and effort is effectively doubled, eating into revenue thanks to easily preventable, often clerical errors.

Reducing unnecessary denials is a fast and surprisingly simple way to increase revenue and enjoy higher EBITDA.

The American Academy of Family Physicians has recommended automated processes for healthcare

providers combating denial rates and ensuring a healthy cash flow.

Automation can catch denials before they happen by eliminating human error prior to claim submission. In the event of a denial, software can flag problem areas, research denial causes, and recommend actionable steps to remediate the claim prior to appeal or resubmission. Cost savings can be realized down the road as staff learn to avoid repeat mistakes.

Importantly, automation addresses challenges common to growing DSOs including:

- A lack of staff and time to handle a high volume of claim follow-ups
- Decentralized billing functions varying from location to location
- The time-consuming process of training new staff to process dental claims – and keeping them updated on individual payer requirements, CDT codes, etc.
- Backlogs of accounts receivable and unpaid claims

Investing in the right automated solution may yield substantial savings in manual back-office operations and EOB handling and posting. Posting errors could be cut in half – all without adding to the payroll or spending money to recover money.

Rather than new practice locations resulting in increased administrative costs, DSOs can enjoy savings and efficiencies multiplied through automation.

If you would like to learn more about how artificial intelligence can help reduce loss and improve your EBITDA, visit zentist.io/remitai. ■

How to Offer In-House CE

Standardize your office processes and knowledge throughout all your practices.

► BY SARAH THIEL AND SHARON ALLEN, CE ZOOM



Educating your staff, especially within DSOs and large group practices, can be more effective than relying on outdated dental association meetings to provide the needed CE and training. Internal training allows you to offer your staff the required education and standardize your office processes and knowledge throughout all your practices.

If you've started the process for offering CE, you probably realized quickly that it takes a lot of work to become an Approved Provider. The process may seem daunting and not worth the effort.

Why do you pay thousands of dollars for your staff to attend an out-of-town conference? For one, they need the CE for their license renewal. Secondly, you do it because you hope they will return with knowledge and increase the net profit of your office – because we know that education sells.

If you invest in your staff's education, they can educate your

patients on the correct care and services needed, which in turn increases your practice's revenue. If your staff doesn't understand why a service is needed, then they can't effectively explain it to your patients. This flow of education increases the trust and the relationship between patients and your staff.

By offering your CE in-house, you can bring speakers and trainers directly to your offices. If you are an expert in your field, you can provide the CE and train your own staff. We can help you become an Approved Provider so you can educate your

own staff and offer the required CE your staff needs.

CE Zoom makes offering CE simple by eliminating the time, effort, and paperwork required. CE Zoom has done the work to become a recognized CE Provider in accordance with AGD-PACE. By working with us as a Joint Program Provider, we walk you through the red tape and help simplify the process to offer your training. We make sure your education follows the AGD-PACE standards and guidelines.

Additionally, with our state-of-the-art system, we manage the courses, registration, surveys, and other details all the way through the digital CE certificate distribution. With CE Zoom's state-specific CE Tracker, we make sure the courses your staff is taking will count towards their license renewal. You can also view your staff's training completion and what courses are still required.

We take the misery out of the Approved Provider process and allow you to focus on providing courses and training that are aligned with your vision and make your practices more profitable. We do all the heavy lifting so that you don't have to.

Don't worry about how to offer CE, instead let's decide when. Schedule with CE Zoom to get started. ■

For more information, contact help@cezoom.com.

Dental Vacuum Systems as a Water-Saving Solution

Solmetex's NXT DryVac system provides superior operational performance at a reasonable price point.

When it comes to our nation's water reserves, the headlines from this summer were alarming. According to an August CBS News report, the American West is facing its most severe drought in human history. "Research suggests conditions are drier now than they have been for at least 1,200 years, and will likely persist for another decade," CBS reported. Lake Mead, our nation's largest reservoir by volume, sank to record-low elevation.

Indeed, businesses in these areas are turning more and more to water-saving solutions. The Solmetex NXT DryVac is helpful for dental groups in arid climates, and particularly drought-ridden states across the country, because it does not require water to operate.

In addition to being tankless and water-less, NXT DryVac's price point is lower than most dry vacuums on the market. The NXT DryVac vac also competes in price with wet vacs on the market today, which are generally lower in cost than dry vacuums but in the long run, require higher monthly water bills and system maintenance.

Less exposure to minerals in the water equates to less maintenance and repairs.

The Solmetex NXT DryVac system, designed for 4 to 6 users, provides superior operational performance with low acquisition costs, all in a compact footprint for easy installation. The tankless central suction system is 100% water free with an integrated air/water separation system. It has virtually no maintenance and is one of the most cost-effective vacuum systems on the market.

Solmetex recommends the use of PowerScrub Vacuum Line Cleaner on a daily basis to break down and eliminate built up debris in vacuum lines. Its microbial vacuum line cleaner is designed to release specific enzymes to dissolve vacuum line debris on contact. The eco-friendly, dynamic bacteria formulation is 100% biodegradable and remains in the vacuum lines overnight for continual cleaning action, rinsing clean when the job is done. It works with all water temperatures – hot water not required – and meets all EPA VLC requirements with a neutral pH between 6 and 8.

The complete NXT DryVac system is UL Certified, and an annual maintenance kit is available. Its lightweight tankless design and easy installation is great for offices with limited space, and it connects to most pre-existing plumbing. It's also expandable and connects up to two or three NXT DryVac devices.

Dental practices should weigh the pros and cons of each vacuum system with the right assessment of their needs. Solmetex's comprehensive product line provides all the necessary components to meet or exceed the current requirements of the EPA "Dental Rule" regulation on amalgam waste. ■



If you're working hard to reduce the massive water consumption of your practice, we can tell you it's a **Tankless job.**

Solmetex™ NXT DryVac™ Tankless Vacuum System.

Its superior performance, easy installation and compact design requires significantly less water to operate. A remarkable savings for the environment and your practice.



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



Increase Your Dental Organization's Profitability

Three DSO owners share how their cultures benefit their locations and bottom lines.

► BY DANIEL BEAIRD

Meet the panelists

Panelists for 10 Systems & Best Practices To Increase Your Dental Organization's Profitability, presented at this summer's 2022 DEO Growth Summit, held at the Phoenician Resort in Scottsdale, Arizona.



Dr. Peter Kelly, Co-Founder, brings vast dental experience to Operation Dental, a 13-office organization, as a practicing dentist who owns multiple practices.

Along with his general dentistry background, he brings a commitment to superior patient care and provides cutting-edge dental practices. His focus on creating a positive patient experience is bolstered by a professional yet caring demeanor that has earned rave reviews and contributed to a long and successful career. Dr. Kelly embodies the entrepreneurial spirit and is proud to help other dental professionals realize their full potential.

Dr. Joshua Renken, CEO of Renken Dentistry, attended Eastern Illinois University and then the University of Illinois at Chicago where he received his DDS degree. Following associate



work in Chicago, Dr. Renken moved to Springfield and opened his first practice, Renken Dentistry, in 2003. In 2018, Dr. Renken and his family moved to the Austin Texas area to continue growing the Renken Dentistry group, which currently has six locations.



Dr. Ravi Patel is Director of Clinical Operations, Blueprint Smiles Dental Group, with six locations across the metro-Atlanta area. Blueprint's model is intended to facilitate a thriving personal and professional life. They have created a professional and fun environment for the team so that work doesn't feel like work, so in turn, dentistry doesn't feel like dentistry.

Impacting profitability

Making the leap from running a private practice to owning a DSO is an exciting time, and culture plays a vital role. An ownership mentality throughout the organization is necessary. Ideally, it's a top down idea that transitions into a bottom up pursuit, incorporating all of a DSO's practices.

"It's easy to have that mentality, and profitability, when there's

only one location," said Dr. Peter Kelly, CEO and co-founder of Operation Dental, based in Florida. "But after multiple locations are added, another degree of leadership comes into play."

And after opening multiple practices, retaining team members can be a challenge, so onboarding and training them as quickly saves time, energy and money.

"Payroll's the most expensive line item on a profit-and-loss statement," said Dr. Ravi Patel of Buford Family Dental in the Atlanta area. "I don't think anyone hasn't been burned by that fire, but retaining team members is important. Onboarding and training them quickly helps increase profitability."

Providing patients a clear path to health also helps profitability.

“We’ve learned the better we get patients moving to health, the higher that top line goes on our operational savings side,” said Dr. Josh Renken, CEO of Renken Dentistry in Austin, Texas. “We move patients step-by-step through every operator. Our team of hygienists, assistants and doctors speak the same language. Moving patients to greater comprehensive health moves our top line up dramatically.”

Enhancing clinical efficiencies and culture

Renken Dentistry doesn’t have administrative positions. “That’s one of the huge things we’ve done,” Dr. Renken

said. “It’s just dentists, assistants and hygienists at all clinical locations.”

Operation Dental’s most profitable offices have dental assistants who carry the burden of treating the patient and getting them to say yes to treatment so the doctors can work more columns.


The Florida DSO is also building a dental assistant school to be a driver of business growth.

“You work with your dental assistants every day. I had to let a doctor go and I took over a practice for eight weeks,” Operation Dental’s Dr. Kelly said. “It was one of the most eye-opening experiences I’ve had in the DSO evolution of my practice.”

If a dental assistant isn’t using supplies correctly, it doesn’t matter how much the DSO lowers its supply costs, for example. “That experience reminded me of the interactions between my dental assistants, patients and front desk, and how important those are in driving profitability,” Dr. Kelly said.

“A dental assistant’s mood is going to be dictated by the dentist’s mood,” he added. “We really preach that to our doctors because when team members endorse you as a dentist and as a human being, then that alignment is created.”

Dr. Kelly says people are motivated by two things: money and




Swiss Monkey

YOUR DENTAL PRACTICE
OPERATIONS RE-IMAGINED.

(916) 500-4125
contact@swissmonkey.io
www.swissmonkey.io

Need extra hands to get everything done?

LET SWISS MONKEY HELP!



VIRTUAL FRONT DESK SERVICES

Never be without a front desk again! Our services can be used as a permanent or interim resource for your practice! Below are some examples of items we can help with.

- Dental Concierge Receptionist (Phone Services)
- Insurance Aging
- Hygiene Recare
- Patient Aging
- Recruitment
- Billing/Posting
- Special Projects

“★★★★★

Now that we are using Swiss Monkey's Dental Concierge Desk services we are seeing more new patients. Even more than we were getting previously with a new patient coordinator in house!

- General Practice, South Laurel MD

”



appreciation. “We often forget to give appreciation to our employees or our family members,” he said. “We’re busy. We’re focused on what’s wrong and we’re not paying attention to what is actually working, but that’s related to profitability.”

Standardization and leveraging technology

Standardizing equipment can also drive profitability. All the little stuff that’s not thought about, according to Dr. Patel.

“From your chairs to your ultrasonics, broken equipment is a loss of production,” he said. “If you have consistency between your products and equipment, you might be able to use them at another location that doesn’t have them.” And, he adds, the repair technician isn’t working on 15 different types

of chairs and will be able to repair something quickly.

He also adds that cutting down on the number of processes an office has can help drive profitability and that’s attainable through technology.

“Just a patient checking into your office, for example. It wasn’t too long ago that we had paper forms that we were filling for every single patient,” Dr. Patel said. “That took 15 minutes, so if you can digitize that then that saves time and time equals money.”

Leadership, lifestyle and human resources

Dr. Patel says his DSO is more of a lifestyle DSO.

“We’re pretty laid back to begin with,” he said. “We’re looking for results at the end of the day, but we’re not open crazy hours and don’t have

to be that hard on our staff. If they can find some way to define their niche, they’re going to stay.”

And Dr. Renken’s practices have democratized leadership and management without the presence of office managers. “It’s empowered people to take on more influence and control,” he said. “Before, office managers tended to drive the culture of an office and I didn’t like that.”

Both DSOs have outsourced as much customer relationship management processes as possible so those aren’t dependent upon their team members.

“We onboard and use a training portal for compliance training to go along with our own training,” Dr. Patel said. “Our videos lay out our systems and protocols that help get our people into our organization faster – much faster than we were doing five years ago.”

Dr. Patel's team also cross trains. "Your front office team member probably doesn't need to know how to place an implant, but if they know how to break down a room that helps on busy days or when people are out sick," he said. "If you have a training system in place, it's not so much of a burden on yourself. You send them a link to the video and make sure they watch it. Then if they need help, you go help them. But for simple tasks like breaking down a room, it's not labor intensive."

And Dr. Renken's team doesn't have treatment plan coordinators, so it definitely cross trains.

"I'd say our assistants are well cross trained," he said. "But I like the idea of team being more specialized

in each department and cross training across the department."

Internal marketing

Cross training teams is a way to fire on all cylinders, which is necessary when marketing to your own patients. A great patient experience is an absolute for a profitable internal referral rate.

"The internal referral rate is huge," Dr. Kelly said. "Our chief marketing officer is world class. But if you can't find an amazing marketing person, then a marketing vendor can help grow multiple locations."

Dr. Kelly bought his practice from an older, retired doctor who didn't market it. "When I added my chief

of operations, he recommended we start using Google for advertising," Dr. Kelly recounted. "I didn't believe in it, and he paid for it himself."

That was a revelation to Dr. Kelly. "I said, 'wow.' I looked back at all the years before that and the money I could have made if I had believed in marketing."

Dr. Patel uses Google for its services. "It's the first place I looked, and we made sure that our practice reputations were solid there. You can ask your own patients to write reviews and that helps from a global sense of growing your business. Then, you can take the next step of starting to pay for Google ads or working with a marketing company." ■



EXPECT EXCELLENCE BEYOND THE OPERATORY.

Trust A-dec® for exceptional mechanical room equipment.

Dental groups committed to excellence understand the value A-dec brings to the whole practice. Leveraging on-demand performance, A-dec mechanical room equipment channels air and suction exactly when and where they're needed, saving money and energy.

Imagine—smart solutions that save time, energy and money. What else would you expect from A-dec?

Talk to an A-dec DSO specialist today.

1-800-547-1883 | DSOcustomerservice@A-dec.com | A-dec.com/dso

© 2022 A-dec Inc. All rights reserved.



Data, Systems, and Unscheduled Treatment

Through data dental groups may discover untapped dentistry within the four walls of their practices.

► BY JOHN STAMPER, FOUNDER, JRS4 MEDIA/DENTALCAST PRODUCTIONS



Data is the unbiased, truth-telling source of information that business owners should be tapping into to improve and streamline their processes. Whether you are in the middle of building a business from the ground up or you are looking for a way to breathe fresh life into your current operation, data is the key to better business operations.

As a dental entrepreneur, I have been harnessing the power of data for years to improve dental practices and patient care across the board. Evaluating our systems for weaknesses in the daily operations is an incredibly powerful way to encourage growth and prosperity for a business in any industry, but especially vital in the dental industry.

But are dental practices actually paying attention to the data?

Recently, I launched a number of companies back in 2019, one of which is a dental media company. I go to trade shows and interview dental people, asking about their stories. Stories fascinate me and I believe that everything threads together, but the one thing that kept coming back in my dental career is the topic of unscheduled treatment.

My dental journey

My dental journey is a little unconventional compared to the majority of the industry. I am a dental entrepreneur, but not in the traditional sense – I’m not a dentist. I don’t own dental practices, but I’ve been in the industry for about 18 years. The entrepreneurial bug bit me about seven years ago.

I started in dentistry in 2004 with a company called Brasseler USA, a medical equipment manufacturer. After eight years with Brasseler, I had the opportunity to partner with Dr. Wayne Mortenson and his company, Mortenson Family Dental. At that time, they had grown to about 70 practices rather quickly, but that had leveled off. Dr. Mortenson was concerned and wanted to find a way to keep growing.



Just say no to no-shows

80% of practices using Solutionreach have <10% no-shows. Most have <5%.

Schedule your free demo and start saving your practice money today.

800-258-7744 | www.solutionreach.com



There was no official position available for me, but they asked if I could visit five of their practices over the next 30 days to see if there was an opportunity where my services could help them. With my background in sales, the only thing I knew was to look for opportunities.

I stumbled across a little report in Opendental for unscheduled treatment. I pulled it out and started to look at the numbers and was astonished by what I found – case after case of unscheduled treatments, amounting to thousands of dollars in missed revenue by these practices.

I started to have conversations with the office managers and the providers, going patient by patient. I would have conversations along these lines: “Susie has \$1,200 worth of work that needs to be done; when was the last time you spoke with her. Six months ago?” I started seeing a pattern of conversations in the practices obsessing over new patients.

Mortensen Family Dental hired me, and my responsibility was to go around to all 70 practices and work with those offices on helping them find ways to get those patients in and get those treatments done.

Establishing valuable systems with data

In the dental industry, we are fortunate to be able to be reactive in the way that we work. What I mean by that is patients come to the dentist for pain relief, which means that you don’t have to be super proactive in finding new patients. As I looked at those unscheduled treatments in Opendental, I realized that there was already so much untapped dentistry within the four walls of so many practices.

That doesn’t mean that we won’t work with new patients, but why not serve the unscheduled treatments we already have in our systems? I became the unscheduled

treatment guy, but I also focused on helping these practices build systems using data as our navigator.

What I started to realize when I was talking to these practices was the data, for many of them, just didn’t matter. What really mattered was getting the dentistry done every day and taking care of their patients. I had to find a way to get these dentists to appreciate the value and potential looking at the data.

Dr. William Engilman built the custom KPI reporting system while I was at Mortenson. I worked with him to identify the KPI metrics that at the time we thought were the most important for the business.

One of the systems that did eventually catch on was PSLM, which stands for people, supplies, lab, and maintenance. This system was designed to manage each of those critical components in a dental practice, and it worked! Over time, the organization started to appreciate the data and the systems. It just took a lot of coaching, and it was a huge learning experience for everyone involved.

The reality is that you will never be able to tackle unscheduled treatment all at once in your practices. It has to happen in little bite-sized pieces, and I think it requires a different approach. Are we going to look at unscheduled treatment from the lens of what it is?

Dentistry is expensive and patients are always going to have financial issues. If they had money or if insurance covered it, they would get the treatment done. It’s also important to think about what would happen if, for the next 60 days, your practice had no new patients. What would happen if the marketing dollars you spent to get new patients was put towards your unscheduled treatment patients?

We need to realize that there is already so much dentistry within the four walls of our practices. How can we shift our focus to reach them? ■



John Stamper

has over 25 years of leadership, business, people development and entrepreneurial experience. He thrives on motivating people how to build the bridges that will take them from the “here and now” to “a successful tomorrow”. From his early days as a submariner in the U.S. Navy, John has been fascinated with human achievement and the desire we all have to be a part of something great. He believes that joy, in its purest form, is discovered when we mix our passion to succeed at something with commitment and sacrifice.

INVEST IN THE FUTURE OF YOUR PRACTICE



“

*glidewell.io™ boosted production so much that we purchased two additional mills to keep up with demand for same-visit crowns. Each mill added about \$1,000 in revenue per day. **Investing in glidewell.io is the best financial decision we've ever made.***

”

– Dr. Joshua Prentice | Bend, OR

Graduate of the University of Oklahoma College of Dentistry
Dr. Prentice has been a glidewell.io user since 2020.



Effortlessly mill the crowns you want when you want:

- Mill fully sintered BruxZir® crowns and bridges with no oven time required — just polish and cement, and you're done.
- Let MarginAI™ and CrownAI™ do the design work for you so you can spend your time with your patients.
- You're connected directly to Glidewell for training and support at any time.
- Love your scanner? Great — glidewell.io™ is an open system and works with your preferred scanning system.

We'll show you how easy same-visit crowns should be!

To learn more about glidewell.io, visit
www.glidewell.io/promotions/watch-demo

Pair your intraoral scanner
with glidewell.io for only

\$49,995

Contact us for current promotional trade-in offers and payment plans. Packages that include an intraoral scanner are also available.

glidewell.io™
IN-OFFICE SOLUTION

www.glidewell.io | 888-683-2063

7 Key Financial Systems to Build Your Dental Practice

By tracking your financial performance, you can make the informed decisions needed to grow your organization.

► BY KEN KAUFMAN, PRESIDENT/CFO, NUVIA DENTAL IMPLANT CENTER



Finances are a major pain point for any business, any industry. No matter what line of work you are in, generating and perpetuating revenue is one of the bigger obstacles you have to overcome every month. Without the right financial systems in place to track your financial performance, you will not be able to make the informed decisions that you need to grow your organization.

Establishing financial systems within your dental practice is a critical component to the success of your practice. When you have good, solid financial information, it empowers you to look backward to see what has been successful, as well as look forward – equipping you to plan your next steps. These systems can remove any anxiety you might feel about your business and replace it with confidence that is overwhelmingly powerful.

Here are seven key financial systems you can use to build your dental practice:

1 Monthly financial statements Monthly financial statements are a truth-teller. If you are looking at making a big investment, your monthly financial statements will show you through the numbers whether that's a wise decision or not. The monthly financial statement

New Invisalign® Outcome Simulator Pro



From wow to yes in minutes.

A powerful chairside tool for driving treatment acceptance and providing highly realistic in-face visualizations of your patient's potential future smile. Available on the iTero Element™ Plus Series imaging systems.



Enjoy realistic simulations.



Designed to increase Invisalign case acceptance.



Make the most of patient chair time.



Access simulations at any time from the cloud.



invisalign®

iTero™

Schedule a demo today and
learn more at iTero.com



align™

© 2022 Align Technology, Inc. All rights reserved. Invisalign®, iTero®, iTero Element, iTero Element 5D Plus, the iTero logo, among others, are trademarks and/or service marks of Align Technology, Inc. or one of its subsidiaries or affiliated companies and may be registered in the U.S. and/or other countries. | A004462 Rev A

should include an income statement, a balance sheet and a statement of cash flow. It can be easy to laser-focus on just one of these documents, but every good business operator understands that you need all three for the full picture.

The faster your accountant or accounting team can get you these financial statements, the better off your organization will be. Early documentation allows you as an operator to see what's happening and to quickly make relevant changes or decisions that will help your business. You should expect your monthly financial statement no later than the middle of the following month, and hopefully sooner!

2 90-day cash forecast

I believe that you cannot truly claim the title of entrepreneur unless you have been less than a week away from payroll and not had enough cash in the bank to make payroll. That is, I think, the true evidence that you have reached one of the pinnacles of entrepreneurship. Cash management is so critical.

When you have 90 days to solve a cash flow problem, it's much easier to solve that problem long before it becomes a serious concern. If you have three days to solve a problem, but you don't have enough cash for payroll, that's a much harder problem to solve. This is why we call the 90-day cash forecast the "sleep well at night report."

This forecast needs to be updated weekly because your business will change that frequently. You need to look for whether you are burning or accumulating cash



If you have three days to solve a problem, but you don't have enough cash for payroll, that's a much harder problem to solve. This is why we call the 90-day cash forecast the "sleep well at night report."

week over week, as well as what levers you have if you see shortages or declines within the next 90 days. It's all about short-term forward-looking visibility.

3 Annual budget with monthly variance analysis

The annual budget with monthly variance analysis is a specific process that identifies the track that you are

currently on and pinpoints what you need to do to get where you want to be. You should be asking hard-hitting questions like: How do we try to make improvements? Where do we want to push? Where do we want to stretch? Where do we want to try and add specialty services? Where do we want to try to change some behaviors and create better outcomes for our patients?

INNOVATIVE

Aerosol Reduction Technologies



Ti-Max Z95L

Equipped with **TWO-WAY SPRAY** technology to reduce aerosols with the flip of a switch.



DualDefense

All couplers and micromotors have integrated **ANTI-RETRACTION SYSTEMS** that reduce cross-contamination of water lines.

All NSK handpieces are equipped with a **CLEAN HEAD SYSTEM** that reduces suck-back.



After you have answered those questions, set a goal for your organization and your team for the year. Once the goal and the budget are set, you need to be prepared to evaluate your variances on a monthly basis. The process of evaluating those variances and invalidating/validating each of the assumptions you made is more instructive and makes you a more powerful operator than creating the budget in the first place.

By mapping out a 12-month plan and keeping this forecast updated for the next 12 months, you are investing into the future of your team and your company.

4 12-month rolling forecast

The 12-month rolling forecast is your vision to the future, a sort of crystal ball that helps to guide your decisions and shape your vision. This is something that you should always have written down on paper, or in an Excel spreadsheet with plenty of rows and columns. This forecast can help you stay on track with what you're currently doing, while showing you what 12 months in the future could look like.

Building forecasts are essential to streamline your vision, not just in the way you strategize the future of your business but in how you make the decisions that will affect you in the long-term. By mapping out a 12-month plan and keeping this forecast updated for the next 12 months, you are investing into the future of your team and your company.

5 5-year financial model including cap table

This model is so important because it takes your current business and marries it up with your ideas and future strategies, putting them through a financial rigor that creates a lens demonstrating how profitable your organization could be, as well as what the equity value should be. Every entrepreneur who has grown a business will agree that the most valuable financial tool to maximize



impact and enterprise value long term is the five-year financial model. It casts everything you are or will do in the business and lets you toggle between options so you know what changes in your business will be most meaningful and impactful for the stakeholders.

A capitalization table – or cap table – is a model that allows you to calculate the percentage of ownership and see the financial outcomes. For each owner. If you're the full, 100% owner of your DSO, that means your cap table is you at 100%. If you have other partners, it will show what percentage of the equity each of those partners owns.

6 Proforma and investment thesis for all growth projects

If you are going to start a practice or launch a specialty office, a proforma is a forward-looking statement of what you think a specific project is going to do. Is the new specialty office going to keep referrals in-house? Will a new office in this region tap into an untouched market? Will this marketing initiative reach the intended audience? An investment thesis is all the logic that you are putting into the proforma to be able to look at what the financial outcomes are going to be.

7 Monthly and quarterly reporting package for all stakeholders

If you create one report that shows your financial performance and share it with every stakeholder in your business, it's going to be too generic. Different stakeholders are looking for different information based on what part of the business they are the most active in. Having a generic report that tries to answer every question for every person in the business will end up answering no questions and will not be helpful at all.

The more you can tailor the information to the needs of each party. ■

straumanngroup



 **straumann**[®]

 **NEODENT**[®]
A Straumann Group Brand

 **MEDENTIKA**[®]
A Straumann Group Brand

clearcorrect

CARESTACK

Operational Systems for Scale

The value of creating and implementing systems for your organization.

► BY AMBER COLLINS, COO, PEAK DENTAL SERVICES

Every business leader is looking for the right operational systems to help them scale, or even systems that they can implement to scale with their business as they grow. Creating a system like that can be a drawn-out process, but it's worth the effort to implement something that will improve your organization.

I started at Peak Dental in 2009 as a general manager, back when we had one location. Since then, I've been focused on building and growing teams as well as being involved in opening all 40 of the offices we have today.

As the Chief Operating Officer at Peak Dental, I spend a lot of time focusing on our operational systems: What are we doing today? Does that work for 40 locations? Will it work for 100 locations? I think a lot about scalability as it pertains to culture and people, systems, processes and training.



Leadership development

When it comes to developing leaders in any industry, you need people that aren't afraid to be a student. In my experience, the best way to develop yourself as a leader is to constantly be looking for opportunities to learn and grow. Taking those opportunities can be a daunting experience, but I always encourage young leaders to look for opportunities where they can step in and prove themselves.

In the hiring process, I typically look for people who have a good attitude and who are capable of receiving feedback. We tend to hire a lot of people with little to no dental

experience, because it's not necessarily the dental experience that matters in leadership – especially in our organization. What we are looking for is the kind of person who is going to take opportunities and learn along the way. Leadership is a growth process, and that person should be willing to go through the challenging aspects of growth. Training is a huge part of that growth process.


Creating a training process

Around the three to five location mark, we realized we needed some training to put in place, because the more that we were looking to scale, the more you have to have consistency

across locations. Training programs are going to provide the consistency you need.


We have gone acronym-heavy with a lot of our training systems. TOM, which stands for top office management, is a training manual that everyone in the front office goes through, including patient coordinators and treatment coordinators. The TOM manual is a comprehensive manual on how to manage your practice, how to grow a practice, how to take care of your patients, and how to lead the team within that practice.

The hardest thing about any training manual is breaking it down,




Go digital. Get better results.

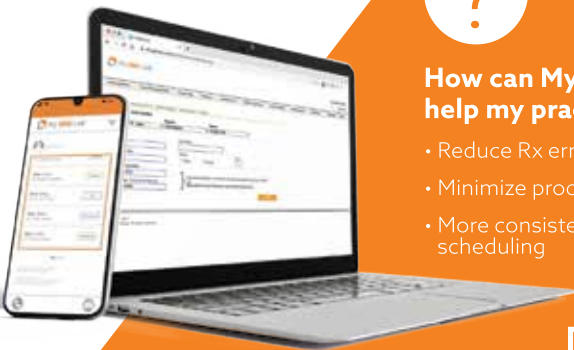
Save time and money with our complimentary, comprehensive case management portal, **MyDDSLAB.com**. Use it online or through our mobile app.


 **Use MyDDSLAB.com to...**

- ✓ Submit your prescriptions online
- ✓ Manage and create shipping labels
- ✓ Track cases in the production cycle
- ✓ View account balance and pay invoices online
- ✓ Access and search your case history
- ✓ View and upload case photos

 **MyDDS LAB mobile app is designed to save you time.**

- ✓ Instantly view color-coded status updates, so you know what stage of production your patient's case is in and when to contact the lab
- ✓ View and upload case photos






How can MyDDS Lab help my practice?

- Reduce Rx errors
- Minimize production delays
- More consistent patient scheduling

Get started with MyDDS LAB
Visit go.ddslab.com/myddslab



MKTDOC012 Rev A 09/22

which probably took more time than collecting the content for the training. The way I approached it was to think about what we did within our organization every single day. How did we hold people within the front office accountable? Can you train the front office team on what you are holding them accountable for?

For me, it was all about putting pen to paper. I have found that when you are trying to rally a team to create something this large, you need to put together a work plan and hold one person accountable to each task.

As we've gone along and written more training manuals, we learned that we needed to set up a cadence of meetings to hold each other accountable to certain deadlines. If you want something to be produced within a certain amount of time, you need some sort of cadence of meetings to put that together.

When you're developing a training system, the process will require as much effort as you are willing to give it. For our systems, we wanted to create consistency and clarity. Clarity is key when you're trying to hold people accountable for a

specific job that they need to do. It can also apply to culture – if people don't feel like they have a sense of direction or the proper training to perform in the role, they don't tend to feel as involved in the day-to-day successes of the organization.

Leaving space for accountability

Accountability can be a tricky subject; a balancing act between setting expectations and micromanaging. At the office manager level, we have a 15 item one-pager that includes the 15 things that absolutely need to get done around the office. If you are in the green, you are accomplishing each of these tasks every day; yellow, you could probably use some more work in specific areas; if you're in the red, we are either not hitting a benchmark or you are not doing that specific task. The regional managers manage that process, sending them out on a weekly basis to their regions.

At the regional manager level, we have them on a cadence that they have to follow. These tasks are things like what they should be looking at on a daily basis, who they should be talking to, the frequency of meetings, and even the quarterly review process with all of our employees.

Essentially, we are looking for managers to understand how to improve the patient experience. Everything that anyone in our organization does should lead to a positive, excellent patient experience. Patient care is our number one priority, and the only way to ensure that the patient is truly cared for is to implement the right systems for our team. ■



Dental Technology

Will technology drive enterprise value when you exit?

We are often asked by clients if they should invest in new technologies to help drive up value in their practice or group. They may be looking to upgrade to CEREC, CAD-CAM, or get their first CBCT. Some are interested in migrating to a new practice management system, automated patient communication software or add a call center (and people to staff it). We get it – dental technology is very cool these days!

The reality is that you should not make a single new purchase without understanding your exit plan. Why? Valuation in today's dental market is based off EBITDA (Earnings before Interest, Taxes, Depreciation of your fixed assets, and Amortization of your goodwill). In essence, **EBITDA is indifferent to the age and quality of the assets in your business.** EBITDA is only focused on what type of operating cash flow those assets produce.

Technology alone is not a driver of valuation. The purchase of new technology is an investment in your business that you should expect to see a return on in the years to come, but it does not provide an immediate return on investment and very likely will not get you a ROI at the closing table if it has not shown a material improvement to EBITDA since it has been purchased and implemented.

You must start with the end in mind before making any major technology investments in your business. Follow these 3 simple steps to ensure that you get a ROI on any new purchases:



1 You must know what your business is worth today.

- TUSK works with hundreds of practice, group practices and DSOs each year to help them understand the value of their business.

2 Is the value of your business plus your current retirement savings enough for you to “hit your number”?

- Once you have hit the number, you may be taking on more risk

than necessary and it could be a good time to exit.

3 Based on the answers to 1 and 2, do you plan on exiting in the next 12 months?

- If the answer is YES, then do not make any major investments in your business as it is unlikely that you will enjoy a return on any dollars spent.
- If you think that you will sell in the next 2-4 years, feel free to make investments in technologies that you are certain will grant you a quick payback and ROI.
- If you are looking to hold on to the business for 4+ years, you are in the “anything goes” category as you still have time to experiment, make major investments in technology and your team and your patient care.

Keep in mind that every buyer is different. Some care more about the technology stack than anything else, while some only care that the standard of care – relative to the surrounding market – is being met.

Finally, always reach out to TUSK for a valuation of your existing business. **It's difficult to determine what to invest in if you don't fully understand the value of the asset you're investing in or the buyers that may come to the table.** ■

Building Clinical Systems and the Importance of KPIs

Why KPIs are the reality check you and your business need. ► BY DR. TAREK ALY, BDS, MBA – CO-FOUNDER, CHIEF OPERATING OFFICER, ORTHODENT

Establishing systems within your organization is a great way to bring order to chaos. Without the clinical systems to keep our processes in check, there would be no way to check progress or find weaknesses within your practice.

I started OrthoDent Management in 2012 as a way to help dental practices establish systems and processes within their practices to improve the daily operations and patient care processes of practices like yours. I specialize in building clinical systems for people in a hurry.

The word system comes from systema, which is the process of putting together to become a greater concept. A sort of composition of different parts, think of the respiratory system or the cardiovascular system. Ideally, all of these different pieces are working together in harmony for a greater purpose.

Shedding the ego

The first step to building an effective clinical system of checks and balances within their practice is a personal one. For dentists, the first thing you need to realize is that you suck. Everyone around you tells you how awesome you are, building your big dentist ego – in reality, what you need is a reality check.

Trust me, I'm not an exception here. It's what I needed too. I looked in the mirror one day and said





REVERE PARTNERS, THE FIRST AND ONLY INDEPENDENT VENTURE FUND FOR ORAL HEALTH, BRINGS CUTTING-EDGE ORAL HEALTH STARTUPS AND THE BRIGHTEST FOUNDERS TO MARKET

TECH EVALS

We compare and optimize the most sustainable tech, software and consumables for your organization or practice from among our 500+ diligenced oraltech startups

TECH PILOTS

Try innovative oraltech products and services while we provide a structured pilot process and an optional implementation team

IF YOU'RE INTERESTED IN LEARNING MORE ABOUT, OR
INVESTING IN, REVERE, CONTACT

jeremy@reverepartnersvc.com

Opening your first practice, or even just a new practice, requires a certain set of strategic KPIs that you can set as milestones to help you to flesh out your business in the early stages.

to myself, “Hey, you suck. There are a lot of holes in your business. You’re losing a lot of money in revenue cycle management. You are unhappy. Your teams are unhappy. The retention rate sucks. Look at what you built.”

The ego is one of the biggest obstacles to success in any industry. It’s hard to grow and change when you’re existing in a state where you don’t believe you need to change. Getting your ego out of the way is the first step to really freeing yourself up to build a great clinical system for your practice. Once that’s done, you can start setting up your key performance indicators (KPIs).

Learning to love the process

I love KPIs because they show the truth. They tell you exactly where you are right now, with no one sugar coating it. You can analyze and measure the data and start building standard operating procedures from there. KPIs are designed to benchmark and measure your initiatives, giving you a clear picture of how your practice is performing and where it could use some work.

The standard operating procedures are step by step processes that help you achieve your goal. First, you realize that you suck, you measure your KPIs, you analyze the data, you build your standard operating procedures, you implement and train – and that still might not be enough! Make sure that you are doing quality checks, staying in compliance, and ensuring that the process is working.

Part of that process is repetition until you find something that works, but it’s also important to remember that your stage of the business cycle is different than everyone else’s. Just because some of the bigger companies are in a different stage of the process than yours doesn’t mean that what you are doing

is the wrong path. They could be focusing on completely different things than you are, and that’s perfectly fine! You are at a different stage – focus on your journey.

Different kinds of KPIs

KPIs come in all different shapes and sizes, measuring qualities and processes of your practice in various forms and modes. Clinical KPIs focus on the patient care processes and clinical procedures; operational KPIs focus on your day-to-day operations; financial KPIs track the money that’s coming in and out of your practice through revenue, expenses, salary, benefits, etc.

Opening your first practice, or even just a new practice, requires a certain set of strategic KPIs that you can set as milestones to help you to flesh out your business in the early stages.

After starting a business, one of the first things you likely developed was a target market. You had some sort of patient care milestones – working with Invisalign, treating sleep apnea, or just building a successful comprehensive care program.

Operational KPIs deal with the day-to-day operations of your practice – number of new patients, working hours, total patient scene, average care per visit, average care per day, insurance versus cash, etc. There are plenty of practices that don’t track operation KPIs, but they should because of the value and perspective it brings to the operator. It’s not a lot of heavy work, but it is important to get a better look at how you are doing day-to-day.

For example, can you do an endo without taking an X-ray? If you can, I don’t want to go to your office. It’s the same thing with measuring key performance indicators. KPIs are the X-rays you take before making a decision. ■



Tarek Aly practiced Dentistry and Periodontal surgery for years while simultaneously working in Management and Marketing. His expertise includes M&As, Business Valuation, Human Resource Management, Business Operations, Dental Organizations Management, and Dental Support Organizations platform development and management. He is currently the Chief Operations Officer/Co-founder of OrthoDent Management LLC.



Smile Now, Pay-over-time.

**Stress-free financing that
approves more of your patients.**

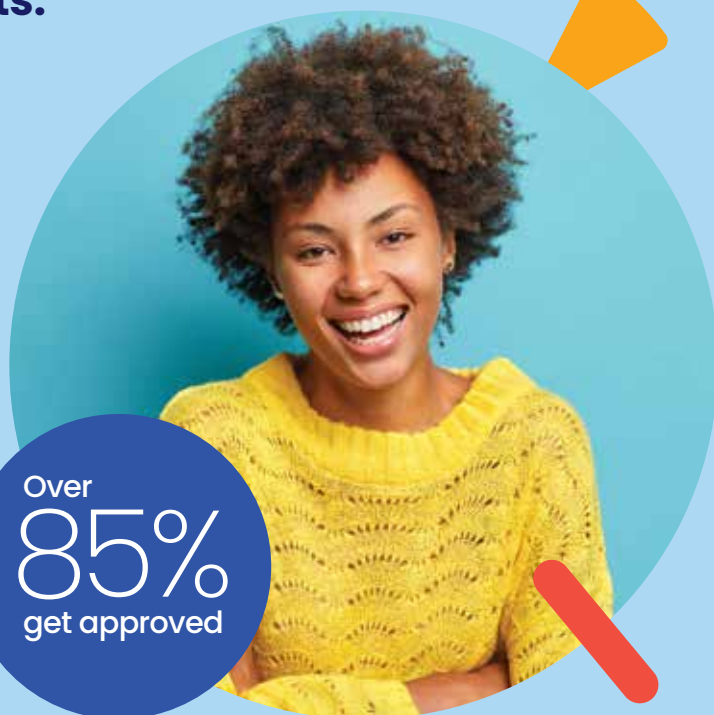


"This is the best financing tool we've seen come to the market. None have compared to Sunbit's simplicity, speed, and overall experience for the patient and staff."

Dr. David Ting
Founder
BDG Dental



Over
85%
get approved



**See why over 600 dental offices are
signing up with Sunbit each month.**

Visit sunbit.com/dental for more information.

Loans are made by TAB Bank.



Using a DSO Playbook to Create Alignment

How a playbook can create simplicity – and success – for you and your team.

► BY JOSEY SEWELL, PARTNER, DEO



Tracking the numerous components of a successful business can be difficult without a guide to help your team understand what exactly they should be working on. Creating a company playbook is a great way to help your organization focus on priorities and achieve business goals on a weekly, monthly, quarterly, and yearly basis.

A company playbook contains all the pieces and parts that make up your company's go-to approach for getting things done. It might include things like process workflows, standard operating procedures, and cultural value that shape a consistent response.

For leaders in the dental industry that are attracted to the idea of a self-managing team, a company playbook is a critical tool. As long

as we have managers helping hold people accountable and a great culture, we can have a self-managing team. However, before that happens, they must have clarity. Many of us are likely convinced that we have provided that clarity, but your idea of clarity could look very different than your team's idea of clarity. A company playbook can help you to be very clear with your expectations.

As leaders, I have found that we have a tendency to overcomplicate things, so the company playbook is about simplicity and clarity. It has your vision, accountability, core processes, a scoreboard, cadence for team meetings, and an ops playset. With these simple pieces, you can track and manage key performance indicators (KPIs) that will lead your practice to success again and again.

My experience growing and managing the scalability of operations in a dental group and the work I do within the DEO with my personal clients and our members have given me the unique experience of seeing various operating models and the challenges companies face in standardizing best practices across multiple locations.

For groups with an acquisition model, it can be daunting, intimidating, and downright frustrating to try to change habits and processes inside practices that already have their way of operating.

In groups that grow by de novo, the challenge becomes duplicating the performance and culture of the original or flagship offices to the new offices as you build. While it is impossible to have every single office be a carbon copy of the best practice in the group, it is possible to standardize what matters and share

*“Leveraging **modern technology** isn’t a choice – it’s a requisite.”*



Eric J. Roman, DDS
DEO Executive Coach &
Strategic Advisor for DSO
Leaders, High Performing
Dentists, and Dental
Companies



Scale Your Multisite Practice

with All-in-One Practice Management Software & White-Glove Service

- Anywhere, Anytime Access
- Centralized Operations
- Role-Based Security
- Modern Patient Experience
- Custom Reporting & Analytics
- World Class Cybersecurity
- 24 / 7 / 365 Customer Service



Schedule your personalized appointment
to demo Curve Hero at **888.910.HERO**
You can also scan this QR Code or go to:
go.curvedental.com/deo-demo

Ascend to new heights with DEO's MAP

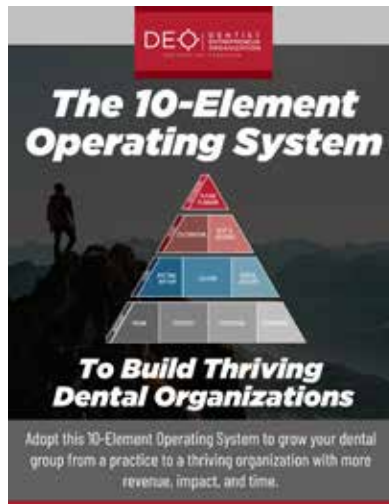
The DEO has created a resource to help dental entrepreneurs grow their dental group from a practice to a thriving organization with more revenue, impact, and time.

Called the DEO MAP (Measure, Align, Perform), it's the first curriculum of its kind, created specifically for dental entrepreneurs of growing dental companies. DEO MAP contains 10 foundational elements dental leaders must get right to build a self-managing, growing, entrepreneurial dental company.

Using the journey of successfully climbing a mountain as its metaphor, DEO MAP guides dental leaders through four symbolic phases of every dental entrepreneur's journey:

- › Basecamp › Peaks
- › Climb › Destination

Visit <https://deodentalgroup.com/10Elements>



The goals of each of DEO MAP's phases and elements are supported with in-person trainings; coaching calls; a collection of carefully curated tools to reach goals including Scorecards, Templates, Examples, Infographics, Roadmaps, Checklists; and much more.

best practices in a way that allows the office and the team to maintain their identity and elevate their performance.

When the idea for the playbook came to me, I was running a single-branded, seven-location, de novo-focused dental group doing about 40 million in annual revenue. Our rule of thumb was that we desired the practices to operate 80% similarly and 20% based on their office “personality” which was often shaped by the Practice Manager and Lead Dentist in the location. If you have practices with various brands that you have acquired, you may decide to have the practices 60% standardized

in their processes and 40% on their own “personality,” or you may flip flop what I did and have it be 20/80.

Before you build a playbook, imagine a scale from 0 to 10 with 10 being highly standardized across practices and 0 being not standard at all. Where does it make sense for the group to live in that spectrum? If you are a 5, pick a handful of best practices that you expect all practices to integrate and make it clear what they can expect from you and what you can expect from them. There aren't any wrong answers, it's just the direction you choose; there will always be



Josey Sewell is a dentistry expert in applying an operating system in dental groups to help them clarify their vision, focus on what matters, and achieve improved team health. She has unique expertise and the ability to weave together sound business systems and team development strategies. Her development programs have empowered leaders and executives to find more joy in their work and control of their business.

challenges to overcome in every type of model. The only wrong choice would be to leave it up to chance and not give teams and offices clear direction and expectations.

Building the playbook

To build the playbook, you must first outline the top 4-5 outcomes you highly desire that can become your “north stars”. Examples from my playbook include: team engagement, dentist engagement, patient satisfaction, same store sales growth, and profitability. I wanted to reverse engineer what it would take to have healthy, happy teams, dentists, and patients. I wanted to see continual growth in the practice, and I wanted us to be profitable. If each of my locations were to accomplish these things, we would be fulfilling our vision and on track with our goals.

For each of the KPIs under the pillars, I broke it down into multiple steps:

- › What are the metrics?
- › What is the goal?
- › Why do we measure it?
- › How do we measure it?
- › What should we do if it's off?
- › Who is responsible for it?

It took some time, but I found that I was eventually able to break each of these down into manageable parts that were easy to understand. There shouldn't be any ambiguity for something like this.

For example, if we wanted our call conversion at 70%, we learned that we needed to spend time on marketing. When patients call, we needed to be able to provide an amazing booking experience; creating an appointment that resulted in strong marketing ROI in practice growth. From there, we could define what and who needed more training in these areas. Managers should be coaching and watching metrics, making adjustments along the way.

There are plenty of things inside a dental office that you can worry about. Once we started using the DSO playbook to simplify and focus on those most important things, then everything else would fall into place. Indeed, a playbook will take the guesswork out of what you prioritize and provide the type of clarity both leaders and team members need to succeed individually and as a company. ■



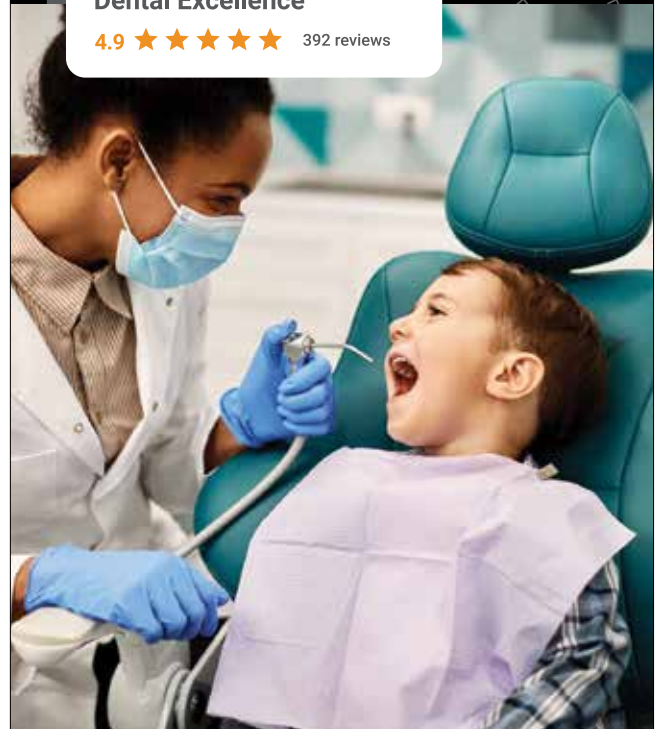
A review platform worth smiling about

Birdeye is the #1 review platform designed to help local dentists outrank and outperform their competition on search.

Q Dentist near me

Pennsylvania Center for
Dental Excellence

4.9 ★★★★★ 392 reviews



Book a demo:

<https://birdeye.com/dental/>

© 2022 Birdeye Inc.



Practice Management Software

How to decide if you should switch.

► BY TANNER APPELGATE, FOUNDER, UNIFY

At what point do you need to consider making a change to your practice management software? Is there a “perfect” practice management software available that will solve all of your problems? As a critical tool in the dental practice, practice management software can only go so far in its ability to make your life easier.

But what if we really can find better software? The only way to do that is to take a look at what your current software is being used for. Is it missing anything? Are you utilizing all of its features? Answering these questions is the best way to start finding a better fit for your DSO.

I view DSOs kind of like a living organism. If we look at DSOs being a human organism, there’s a lot of things we can pull into an analogy. Each of our different departments with its different functions could represent different parts of the human body. Human resources

could be one leg, accounting could be an arm. Hopefully, leadership is the head making decisions.

The practice management software should be the beating heart of your dental practice, because the blood is your cash flow. If it’s working properly, your heart should be pumping blood to the rest of the body. Practice management software is a critical tool that helps organize administrative tasks, streamline appointment bookings, simplify invoice creation and billing, and manage patient medical records.



Multiple locations. Singular operations.

Work as one with cloud-based Fuse software

Whether you have two or 20 locations, you can go from siloed to seamless operations with Fuse practice management software.

Move to one, modern, cloud-based platform for:

- Consistent workflows and processes
- Consolidated patient records
- Centralized data and reports at your fingertips

With Fuse, every patient, schedule and report is connected so your teams can work as one.

Try a demo and see how Fuse supports singular operations across locations.

Visit pattersondental.com/try-fuse or call 833.813.8430.



The truth about practice management software

When I go to conferences and I'm engaging with the other attendees, I will often notice if they have a different practice management software than mine. Sometimes I will have to stop myself from thinking, "One of the reasons they have grown to the size they are is because they have a better PMS software than the one I am using. I should switch to what they have." If I'm not careful, I can slide into the erroneous conclusion that these companies have great practice management software that solves all their problems – when in reality, no practice management software can solve every single problem.

There's not a good enterprise software out there right now. There's no specific one-size-fits-all solution for everybody, but it's amazing how people are out there interacting with each other and thinking, "This is what I have to do. I must change my practice management software to be able to get to the next level."

It's also incredibly important to consider that just because something works great for someone else, that doesn't mean that it's going to meet your needs as well. Every dental practice has specific and dynamic needs that won't be satisfied by every standard practice management software.

The following is a three-point plan I have developed for anyone thinking about changing their practice management software. First, you assess your need for change. Second, you plan a strategy for the change, and third, you implement



and execute the change within your practice.

Assess your need for change

First, you need to assess your need to change your practice management software. At this stage, we are putting pen to paper to identify pain points within the organization, specifically pertaining to the use of our practice management software.

Just like if it was a true heart, going in and doing open heart will do one of two things. If you do it right and prepare, it could have an amazing effect. But if you jump in without any preparation, it could do a ton of damage to the rest of the body.

At this stage, you want to identify the biggest pain points about your current practice management software. Is it web-based and scalable? Once you identify the pain

points, you should look at what the end result should look like to solve these pain points. For example, if your current software isn't web-based, the new one should be.

Additionally, you will want to ask yourself and your team the following questions:

- Why do you want to switch your current software?
- Should we make this transition at this time? Consider your resources: budget, market, revenue, time for training, etc.
- Are you centralizing your current software options into one solution for every practice?

Plan a strategy for change

Once you have the answers to these questions, you need to weigh the benefits of making the change. This decision is not insignificant, so it needs to be considered carefully and

weighed thoughtfully before making any final decisions.

At this stage, you should take all of these specific needs and pain points and find a practice management software that will work for and with you. Take some time to talk to sales reps and maybe even other DSOs that are using the software you are considering and put the options in front of your team for a final evaluation.

There's no need to rush at this stage; the strategy you build for making a change should take some time to formulate. Once that's done, map out your expectations for

implementation and training. Giving your team the time they need to adapt to the new software is another important component of this step. If at any point you feel that a certain option is not the right fit, move on to the next one. There's no point in wasting your time or money on something that won't work for you.

Implement and execute change

Finally, it's time to implement and execute the new software! With your rollout imminent, get your team up to date on what's expected of them with this new software.

Each department should have their key performance indicators (KPIs) already assigned and be fully trained on the new software.

Once the rollout date is here, be prepared for some bumpy transitions along the way. It likely won't be a smooth process, so it's important to prepare for the worst (i.e., network outages, accessibility issues, slow adoption).

Check in on your departments and have a go-to person to be ready to speak to any practices that are having rollout issues. Be patient, because it's going to take some time to get used to the new changes. ■



FIVE LAKES
DENTAL PRACTICE SOLUTIONS

Let's Grow Your Practice



PPO Insurance Analysis

Our report to develop an optimal PPO participation strategy to achieve higher reimbursements from PPO plans.



PPO Negotiations

Negotiate with PPO insurance companies for higher reimbursement plans.



PPO Credentialing

Review qualifications and credentials to ensure proper participation with insurance carriers.



PPO Optimizations

Optimize participation to produce the same amount of patients at the highest rate of reimbursement.



FIVE LAKES
DENTAL PRACTICE SOLUTIONS

30195 Chagrin Blvd., Ste 114N
Pepper Pike, OH 44124
(877) 955-2537
fivelakespro.com



Time to Get Organized

6 key systems to scale your dental group practice.

► BY A.J. PEAK, CEO, PEAK DENTAL SERVICES

Systems and processes are an essential part of developing and growing your business. Without the right systems in place, your business might get by for a little while – but eventually, it will suffer. Establishing these systems early on will only help you in the long run. As you begin to grow, your systems and processes will define how you respond to crises, how you make significant business decisions, and how your competition will match up with you when it's most important.

If you're looking to scale your dental practice, whether you are looking for acquisitions or building de novos, here are six essential, key systems you can use to grow.

1 **Maintain operational discipline**

It might sound simple, but whether you have one location or 40, it's important to have a set, weekly agenda meeting with your management team. For our meetings, we cover the good and bad from the previous week, whether we met KPIs or not, and our high-level, big to-do items for the next week. We also look ahead at the 90-day

milestones for our company. Any of the 90-day goals that are off track become a part of our "discussion" section, where we talk about what might not be working and what we can do to fix the trajectory.

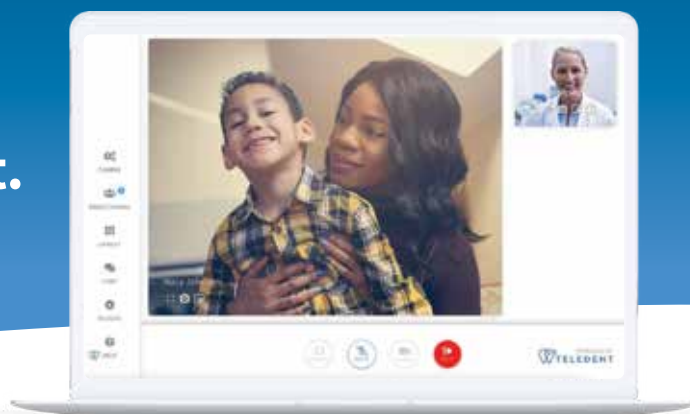
2 **Use project management software to manage acquisitions and de novos**

About two-thirds of our practices are acquisition, and the rest are de novos. If you are anything like me as a founder, you could be on your second, third, fourth, or thousandth location, and you will have all of the tasks that need to be done in your head. If you want

to scale and ramp up the business, you need to get them out of your head and into some sort of system. All you need is some organization. We took several full business days to map out every task it takes to open a practice, even with something as simple as switching over the mail key.

Depending on what program you are using, when someone completes a task, the next step will be assigned to whomever it's meant for. When you don't have a large corporate team, this can really help you to distribute across to 15 people how to onboard a practice, whether we're doing an acquisition or not.

Shift post-op to
virtual. **Save chair
time for treatment.**



**Ask us about optimizing your schedule with
teledentistry at**

mouthwatch.com/lets-talk | 1.877.544.4342



3 Pursue revenue accelerators for acquisitions

There are specific revenue accelerators that you can pursue when you are acquiring practices. On average, we drive 30% revenue improvement in nine months or less when we acquire a practice. First and foremost, you need a regional manager (or most senior manager) on site two to three days a week. It sounds pretty simple, but they won't intuitively do it. Even if you have to glue them to their chair, make sure that someone in that role is in the building.

Talent matters, but as you go from three locations to 40, the different types of talent roles you have are going to change. Thinking about titles is essential as you grow.

With any onboarding processes, we jump right into a rapid training program. If you have your own training, starting that process with your team in the first 45 days is a great way to hit the ground running. Additionally, we try to get rid

of any bad apples within the first week. There's typically one person that won't buy into our vision, and we try to make that change very quickly. Company culture is huge, and it's important to protect your culture from the very beginning.

4 Pursue revenue accelerators for de novos

Just like there are specific revenue accelerators for acquisitions, there are revenue accelerators for de novos as well. First, you need to begin credentialing your senior dentist at your new location. If you start doing that the day you sign your lease, that act is going to save you three to six months of profitability on its own. Training your team before you open might seem a simple enough concept on its own, but it takes a lot of forethought and planning to train your whole team before you open.

What's most important for a de novos is to get patients in the door. While many practices may want to start with big cases to generate more revenue, it's more important to focus on booking the next appointment. Cleanings are great for filling your appointment book, and when your new patients see how well you take care of them, they are much more likely to return for the bigger cases.



5 Plan ahead for your hierarchy of roles

Scaling your dental practice is all about planning ahead. Planning for the hierarchy of your practice is no small part of that process. Talent matters, but as you go from three locations to 40, the different types of talent roles you have are going to change. Thinking about titles is essential as you grow. Starting out, you can get by with an office manager having the title of CEO. But if you grow to any substantive size and want to take on any additional investment from outside investors, you will want those titles to match up with the person's experience.

6 Measure staff performance against clear expectations

Conducting a performance review isn't something that is necessarily taught in dental schools. There is a lot of science in conducting performance reviews well, so it might be helpful to build a review guide for what you think is a good or bad performance. By drawing up what is clearly expected of your staff in a performance review guide, you can eliminate the opportunity for any misunderstandings or misinterpretations on the part of your staff. If they have a clear guideline of what's expected of them, hold them to that in the performance review – for good or bad. ■



A.J. Peak founded Peak Dental Services® in 2008. Under A.J.'s leadership the company has been recognized as one of Inc. Magazines Top 5000 fastest growing companies. He has been 1 of 3 finalists as Small Business Person of the Year by the Pikes Peak Small Business Development Center. A.J. received his MBA from The Kellogg School of Management at Northwestern University and BA in Business Administration from Carnegie Mellon. Prior to starting Peak Dental Services®, A.J. worked at Merrill Lynch as a senior business analyst and with McKinsey & Company for 7 years as an Engagement Manager.

Dentistry's #1 AI-Powered Call Tracking and New Patient Conversion Platform

30% INCREASE IN NEW PATIENT REVENUE

60% REDUCTION IN PATIENT ACQUISITION COST

100% TEAM PERFORMANCE OPTIMIZATION

Averages based on customer data



AI



PATIENT PRISM®



Keys to Happy Dental Associates

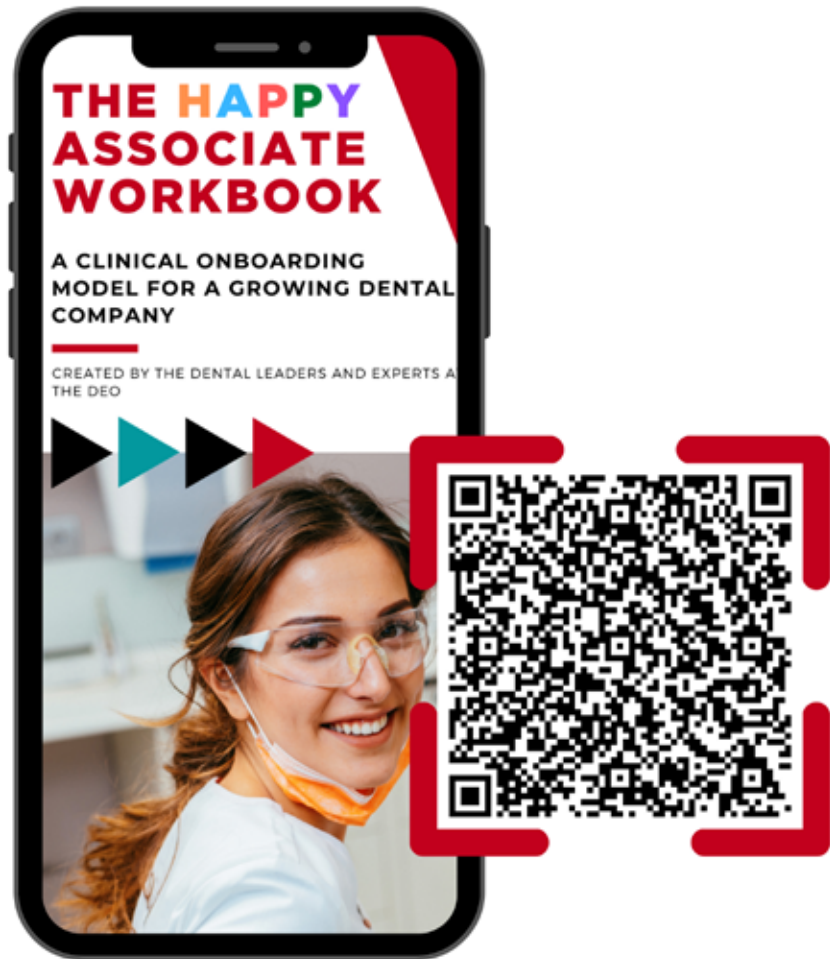
► BY LAURA BOWLES, DEO

When the DEO asks dental entrepreneurs about the biggest challenges they face, associate issues are often at the top. Whether it's hiring, onboarding, training, or retaining associates, we've heard it all! We want to help you find strategies that work and know the pitfalls to avoid for associate success.

So we're excited to share with you our exclusive complimentary 3-part self-paced Crash Course: *Keys to Happy Dental Associates*, presented by Dr. Eric Roman, DEO Partner, to help you create highly effective and repeatable best practice clinical onboarding systems to keep your associates productive, engaged, and happy in your growing business. Dr. Roman has fulfilled the roles of dentist, clinical director, CEO, and consultant while developing and exiting multiple dental groups, including CarolinasDentist which went from 0 to more than \$30M in revenue in 5 years.

To receive instant access, simply scan the QR code to your right. This 3 Segment Crash Course is designed to help you create a successful clinical onboarding system, and set the stage for hiring by being clear on what's a requirement and what's negotiable, and how to engage with team members.

The value Dr. Roman delivers is exceptional. From having trained hundreds of associates in his career, he has gained invaluable insight on how to create lasting successful associate relationships.



This Crash Course is full of actionable intel. It includes:

- 50 minutes of video training sessions broken up into 3 easy segments
- Companion resource guide with steps to create systems for your dental company
- The negotiables and non-negotiables to look for when hiring associates
- Insights to hire the perfect associate for your dental company
- How to implement a successful onboarding process, both clinical and non-clinical
- How to effectively engage with associates: communication tips, who/when/how often, and more
- Additional bonus PDF resources covering “all things” associates

So don't miss this chance: be inspired and armed with a concrete plan to develop great associates! ■

DEO *GROWTH* SUMMIT 2023

TEACHING DENTAL LEADERS TO GROW SUCCESSFULLY

San Diego

California



SAVE THE DATE

JUNE 8-10, 2023

Manchester Grand Hyatt

The most powerful event in group dentistry!

Industry News

U.S. study examines mental health of dental professionals during pandemic

The first known U.S. study to evaluate the mental health of frontline dentists and dental hygienists during the pandemic found that dental health care workers report anxiety and depression symptoms during peaks of transmission among the public.

Published jointly in the August issues of *The Journal of the American Dental Association* and the *Journal of Dental Hygiene* and available online at JADA.ada.org, the study indicates between June 2020 and June 2021, 17.7% of dental health care workers reported anxiety symptoms, 10.7% reported depression symptoms, and 8.3% reported symptoms of both. The one-year study conducted from June 2020 to June 2021, included 8,902 dental health care workers participating monthly in an anonymous longitudinal, web-based survey.

According to the findings, between June 2020 and June 2021, dental hygienists reported higher rates of depression symptoms than dentists at each surveyed time point, with depression symptom rates peaking in December 2020. Dental hygienists' depression rates declined in 2021 as dentists' rates of depression symptoms remained steady. At the end of the study period, both groups had relatively similar rates – 11.8% for dentists and 12.4% for hygienists.

“Interestingly, dental health care workers reported lower rates of

anxiety and depression symptoms than the general public, despite being on the front lines and providing oral health care during the pandemic,” says author Stacey Der-shewitz, J.D., Psy.D., Adjunct Professor of Clinical Psychology and Director of the Center Clinic at the George Washington University Professional Psychology Program. “As the pandemic continues, it is critically important that dental health care workers continue to develop their ability to recognize and address signs and symptoms of mental health conditions within themselves and their colleagues, promote healthy work environments, reduce the impact of stress on the profession, and make supports accessible to those who are struggling emotionally.”

Some participants' anxiety symptoms decreased after receiving the COVID-19 vaccine. The study – also the first to examine the association between the COVID-19 vaccine and mental health – found that unvaccinated dental health care workers who intended to be vaccinated suffered significantly more anxiety symptoms (20.6%) compared to fully-vaccinated dental health care workers (14.1%).

“The hope is that this is just the first of many steps in monitoring mental wellness of the entire oral care team,” says JoAnn Gurenlian, R.D.H., M.S., Ph.D., A.F.A.A.O.M., Director of Education and Research, American Dental Hygienists' Association. “There is much work to be

done to dismantle barriers to treatment and prioritize wellbeing in the oral care setting, as well as look at future research around contributing factors to mental illness that may be unique to these professions.”

The study is part of ongoing collaborative research efforts between the American Dental Association (ADA) and the American Dental Hygienists' Associations (ADHA) to understand COVID-19's impact on dental health care workers.

PDS fully deploys EHR system across locations

Pacific Dental Services® (PDS) announced it has fully deployed Epic, the most widely used comprehensive electronic health records system in the United States, into 100% of its supported dental practices. Currently supporting almost 900 dental practices and growing, PDS is the world's first organization of its kind to enable dental and medical data integration, which holds the promise for improved patient health, according to a release.

“As the single largest commitment of time, energy, and resources for any single project in the history of PDS, even as the COVID-19 pandemic gained traction in early 2020, the decision was made to proceed with deployment to its supported practices, with the first launch occurring in April of that year,” PDS said in a release.

“Oral healthcare is a critical component of overall health, and this investment has enabled our supported

clinicians and their patients to more fully participate in the promise of a seamless, comprehensive healthcare system focused on whole-body health,” said Stephen E. Thorne IV, Founder and CEO of Pacific Dental Services.

In just over two years, PDS said it successfully converted over 9.7 million patient records from its existing practice management software to Epic, spent 16,000 hours training almost 14,000 team members and clinicians, integrated the new software with existing human resources, revenue cycle management, and financial systems, and completed deployment to over 885 individual supported practices across 25 states.

Epic holds more than 250 million patients’ current electronic health records. The system is used by leading hospitals, healthcare systems and medical schools, which rely on the company’s unique software to manage the patient’s health journey. A number of dental schools have also begun transitioning their systems to Epic for this reason.

“Whether the patients of PDS’ supported practices go to the dentist’s office, a clinic, or a hospital, their providers can now review their dental history along with the rest of their medical history from one record in Epic,” said Judy Faulkner, Founder and CEO of Epic. “Our collaboration with PDS supports the connection between dental and medical care, creating a more comprehensive approach to health.”

Heartland Dental announces strategic investment in 123Dentist

Heartland Dental announced that it has signed an agreement to invest in 123Dentist along with lead investment partners KKR and Peloton Capital Management. Heartland’s investment comes as part of the announced strategic business combination between 123Dentist, Altima Dental and Lapointe Group, which, when consummated, would create one of the largest dental support organizations in Canada, with nearly 350 supported dental practices across the country. The combined organization will retain the name 123Dentist.

This strategic investment is Heartland Dental’s first in a DSO outside of the United States. Through the partnership, Heartland Dental and 123Dentist will work together to support the expansion of education and training at 123Dentist, leveraging the breadth and depth of Heartland’s continuing education programs, including

Flexible Solutions for Fixed Appliances

Every patient in your care has a unique situation. With remote monitoring, you can know about the specific needs and issues before your patient sits down in the chair. Our whole office solution puts your data to work and makes life easier for you and your staff.



www.dental-monitoring.com



DentalMonitoring is a product designed and manufactured by Dental Monitoring SAS, under the DentalMind branding for Healthcare Professionals (HCPs). It is also used by patients under the mandatory supervision of Health Care Professionals (HCPs). DentalMonitoring is designed to assist HCPs, registered at DentalMind, in observing remotely intra-oral situations and monitoring orthodontic treatments. DentalMonitoring product is a medical device (in Europe only), registered as such and holding the CE mark. Refer to your HCP and/or the Instructions for Use before use. Products availability, claims and regulatory status may differ across countries depending on local regulations. Contact your local representative for further information. AD_MON_AD_New Braces Starts Promotion H2 for NAM_002_01_rd_A_US_en

leadership development, coaching, and classroom / online education.

As part of the Heartland Dental network of supported practices, 123Dentist supported doctors will receive access to over 80 CE programs provided to Heartland Dental supported doctors and team members annually. Unlike any other continuing dental education program, Heartland Dental's offerings focus on three disciplines – clinical, operational, and leadership, and 123Dentist supported doctors will benefit from courses such as Clinical Essentials and Leadership Fundamentals and Clear Aligner Fundamentals.

AGD comments on CMS physician fee schedule proposals

The Academy of General Dentistry (AGD) recently submitted comment to the Centers for Medicare & Medicaid Services (CMS) on its Medicare physician fee schedule proposals and request for information on Medicare Part A and B payment for dental services. In its comments to CMS, AGD leaders, Gerald J. Botko,

MS, DMD, MAGD, president of AGD, Myron (Mike) Bromberg, DDS, chair, AGD's Legislative and Governmental Affairs Council, and Joseph Battaglia, MS, DMD, chair, AGD's Dental Practice Council, explain that it's the organization's opinion that CMS does not have the authority to expand coverage regarding medically necessary dental provisions.

In June 2022, more than 100 Members of Congress sent a letter to the CMS administrator urging the use of its regulatory authority to increase Medicare's coverage of some dental services. In the letter, the congressional representatives indicated support if the agency expanded its determination of "medically necessary" dental care. In AGD's comments, due to Congressional inability to pass legislative proposals on inclusion of dental services into Medicare it is perceived that the agency is responding to the advocacy efforts of a single political party.

According to AGD's letter, CMS's research must be verifiable, reproducible and not based on poor-quality

evidence. The authors stress that, "The federal government must demonstrate the scientific basis for declaring medical necessity for dental indications and it has not yet done so."

Dental Foundation supporting one health initiative

University of the Pacific's unique Sacramento-based interprofessional health care initiative has received new support with a \$250,000 Access to Care grant awarded to the Arthur A. Dugoni School of Dentistry by the Delta Dental Community Care Foundation.

The funds will support the launch of an innovative teaching and patient care facility that will be one of the first of its kind at a university, according to a release. The project will include the creation of a new clinical and academic facility in Sacramento's Oak Park neighborhood, designed to provide comprehensive primary health care services to the public, while providing an integrated clinical learning environment for students.

Dugoni is collaborating with the School of Health Sciences and Thomas J. Long School of Pharmacy to develop the project. The initiative will include expansion of the Dugoni School's successful International Dental Studies program as well as programs in the School of Health Sciences.

Henry Schein acquires Midway Dental Supply

Henry Schein, Inc., announced the acquisition of Midway Dental Supply, a full-service dental distributor serving dental offices and dental laboratories across the Midwestern

Successful integration

In just over two years, Pacific Dental Services said it:

- Successfully converted over 9.7 million patient records from its existing practice management software to Epic
- Spent 16,000 hours training almost 14,000 team members and clinicians
- Integrated the new software with existing human resources, revenue cycle management, and financial systems
- Completed deployment to over 885 individual supported practices across 25 states

United States. Henry Schein acquired 100% of Midway Dental, which was founded in 1987 by the late Roger Abigt, and is headquartered in Livonia, Michigan. This transaction is expected to be modestly dilutive to Henry Schein's earnings per share in fiscal year 2022 and increasingly accretive thereafter. Financial terms were not disclosed. Midway Dental's sales from 2021 were approximately \$110 million, including nearly \$20 million in sales of personal protective equipment (PPE) and COVID-19 related products. Midway Dental offers a comprehensive portfolio of dental consumable merchandise, equipment, services,

and education products to nearly 7,000 customers, which will be immediately consolidated into Henry Schein's U.S. Dental business, according to a release. The integration of Midway Dental's sales and service team with Henry Schein's network of trusted advisors will further advance the Company's efforts to deliver customized solutions and technology-driven products and services to help our dental customers meet the needs of patients.

Host of DEO Growth Summit 2023 announced

DEO recently announced that the 2023 DEO Growth Summit host

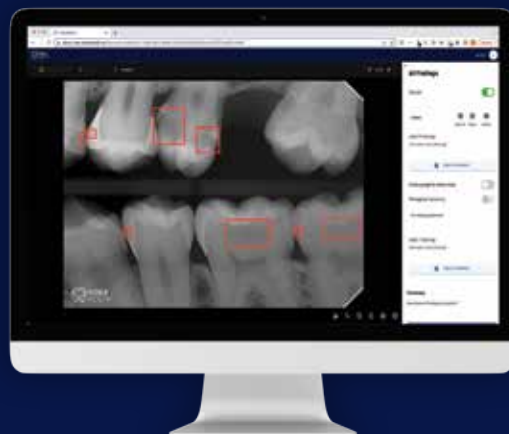
will be DEO Partner Emmet Scott. Scott is a DSO industry expert who's been featured in *Forbes Magazine*, *Entrepreneur Magazine*, *USA Today*, and more. He is CEO/co-founder of Community Dental Partners, one of the fastest-growing DSOs in the country, having led its growth from 1 to 90+ locations with \$100+ M in revenue to date and growing. Scott is also the author of the No. 1 Amazon Bestselling book "DSO Secrets: The Ultimate Guide To Building Your Dental Empire" and the host of the DSO Secrets Podcast. The 2023 Summit will be held June 8-10, in San Diego. Learn more at: deodentalgroup.com ■

FASTER DETECTION + IMPROVED CONFIDENCE

"Not only does Videa help you detect disease faster and more confidently, their AI-powered productivity tools save time in every patient visit."

Dr. Kim Yosoon, DMD

Experience the benefits
of AI-powered dentistry.



Transforming Dentistry Through AI

[WWW.VIDEA.AI](https://www.videa.ai)

*Videa Caries Assist FDA 510(k) clearance achieved on 04/21/2022

Hiring a Director of Operations

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.*



Brett Wells asked: Need advice. I need to hire a Director of Operations for our 5-location group in Raleigh, N.C. I've never had to officially recruit/hire someone for this type of role before, as they are essentially running the operational side of the business, and will be overseeing a 50+ employee company. Where do I start? Recruiter, LinkedIn, Local employment boards etc.? I would love some advice from someone who has had success with this.

A few of the DSO Secrets Facebook page members responses:

"Think outside the box! Look outside dental – I'm in this position over a 3 location group and had previously worked in a large healthcare system with experience in strategic planning, project management, creating protocols/systems, service and process improvement, etc. I had no idea at the time how well these experiences would align with the demands of ops director in a dental group. I would look into nearby large healthcare systems or other outside industries." – **Kristin Burris**

"Fidler and Associates Jon Fidler specializes in this type of role placement." – **Vincent Crump**

"Brett Wells, congrats on your growth. You have great ideas here. I would look outside the industry for someone who understands business development. Hiring this person should allow you to free up your time and investing into mentoring this person on dental specific details would be well worth your time." – **Kathryn Alderman**

"I always refer to Wendy Aldhamen. She's incredible at finding the right fit. I prefer to work with that "right fit" to onboard them and develop your C Suite Operational duties. Growth like yours needs direction."

– **Danya Montoya**



YOUR SYSTEMS YOUR WAY



**Outsourcing
Success Tips**



**Insurance
Verifications/Claims**



**Revenue Cycle
Management**



**Recare &
Reactivation**



**Patient Scheduling
& Appointments**

**Full-Time Dedicated Remote
Team Members To Leverage Your
Growth & Elevate Your Team**



SupportDDS.com



940.784.4782

THE **LEADER** IN PRODUCT SOLUTIONS FOR GROUP PRACTICES

VOCO
THE DENTALISTS



TO IMPROVE PATIENT AND CLINICIAN SATISFACTION!

The Preferred Group Practice Partner for Clinical and Supply Overhead SOLUTIONS

- VOCO offers a full range of competitively-priced restorative, preventive, CAD/CAM materials and more
- Reduce supply costs with products that provide crossover indications
- Award-winning products that deliver proven results to maximize patient quality care
- Simplified procedures to drive clinician satisfaction with innovative products
- Deliver added value to your team through VOCO's extensive and customizable continuing education options

OVER 130 YEARS OF EXPERIENCE AND KNOWLEDGE LED BY:



John O'Neill
National Director of Special Markets

46 Years of Experience

John.ONeill@voco.com

Products that offer
proven **PERFORMANCE**
for Group Practice Needs!



Call 1-888-658-2584

VOCO · 1285 Rosemont Drive · Indian Land, SC 29707 · www.vocoamerica.com · infousa@voco.com

VOCO
THE DENTALISTS