

# DE | MAGAZINE

DENTIST ENTREPRENEUR ORGANIZATION

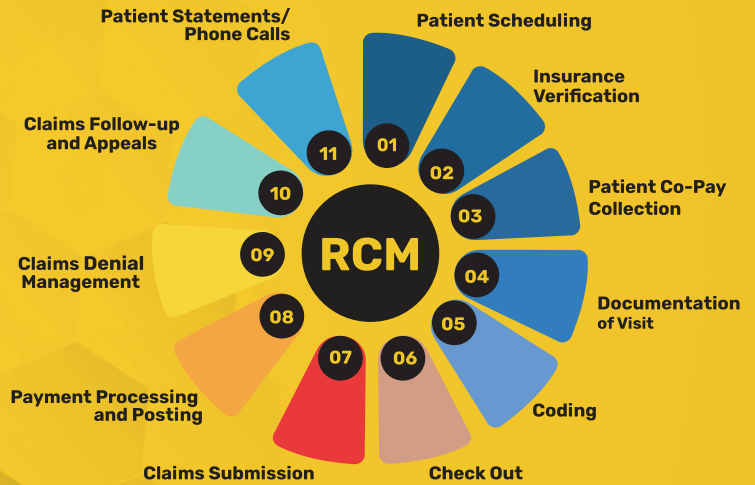
## The Secret to Dental Organization Growth

Frandsen Dental's  
Tiffany Fleisch has seen  
how strong systems  
can lead to  
transformational  
growth.

▶16

**Using a  
Coaching System**  
to Empower  
Your Team. ▶p12

**The Disney**  
of Dentistry. ▶p27



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# Making Memorable Experiences Through Systems

BY JAKE PUHL

**Well-run events don't happen by accident. It takes countless hours of** planning, coordinating, and executing. It also takes a lot of behind the scenes work to pull off. For instance, while attendees listened to our speakers at last year's DEO Summit, there were staff manning the audio and video feed, people distributing materials, stocking the food and drinks, and answering questions.

All of those actions happened offstage or backstage to the presentations and panels, but they were no less important to the overall experience. They were very intentional and very purposeful. They were generated and repeated through a system we have developed for attendees at each event we hold.



In “The Goal: A Process of Ongoing Improvement” the authors write about the theory of constraints, which is a pivotal movement in an entrepreneur or executive or leader’s career. Learning the theory of constraints unlocks growth and clarity more than almost any other business principle that exists. Here at the DEO we work with members daily to introduce and master the concept of the theory of constraints.

Systems can get you past those constraints you are feeling in your organization. Systems are so important to your business that we’ve made it one of the pillars of a section of the DEO growth model.

This issue of DEO Magazine is jam-packed full of best practices for systems. In our cover story, Tiffany Fleisch, director of operations for Utah-based Frandsen Dental, tells DEO Magazine why she is a big believer in systems. “Today,

we’re constantly trying to simplify our systems,” she said. “How do we make them easier for the end user, my team members? For my team, I want it to be an easy part of their day. I don’t want to stack a bunch of things on them. When we create a system, how do we take 20 steps and cut them down to five? We’re constantly trying to look for efficiencies in our systems that make it easier for the team overall.”

From there we’ve got stories on how to use systems to turn scoreboard data into positive change within your organization, using a coaching system to empower your team, why an operations playbook is critical to growth, and more.

The ability to create magical experiences in a unique healthcare environment is why many of our DEO members decided to choose dentistry as their profession in the first place.

We believe our job through the curriculum we produce, events, and even this magazine, is to take those things that sometimes are seen as accidents in a business and make them predictable and consistent. That consistency will provide you with the growth, and culture, and the experience that you want for your people.

Cheers!

**Jake Puhl**

# A strong team.

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Show me  
how it works

Achieve a better patient experience, faster treatments and stronger results. Discover our coordinated products for direct restorative therapy. Schedule your personal demonstration now and receive a free workflow trial kit.

# Building Your Operations Playbook

Why a playbook is fundamental to the growth of your organization, and the best practices to use when creating one.

Dentistry is not a one-man show. You certainly couldn't do dentistry without dentists, but there is so much more to owning and operating a successful dental practice than practicing good dentistry.

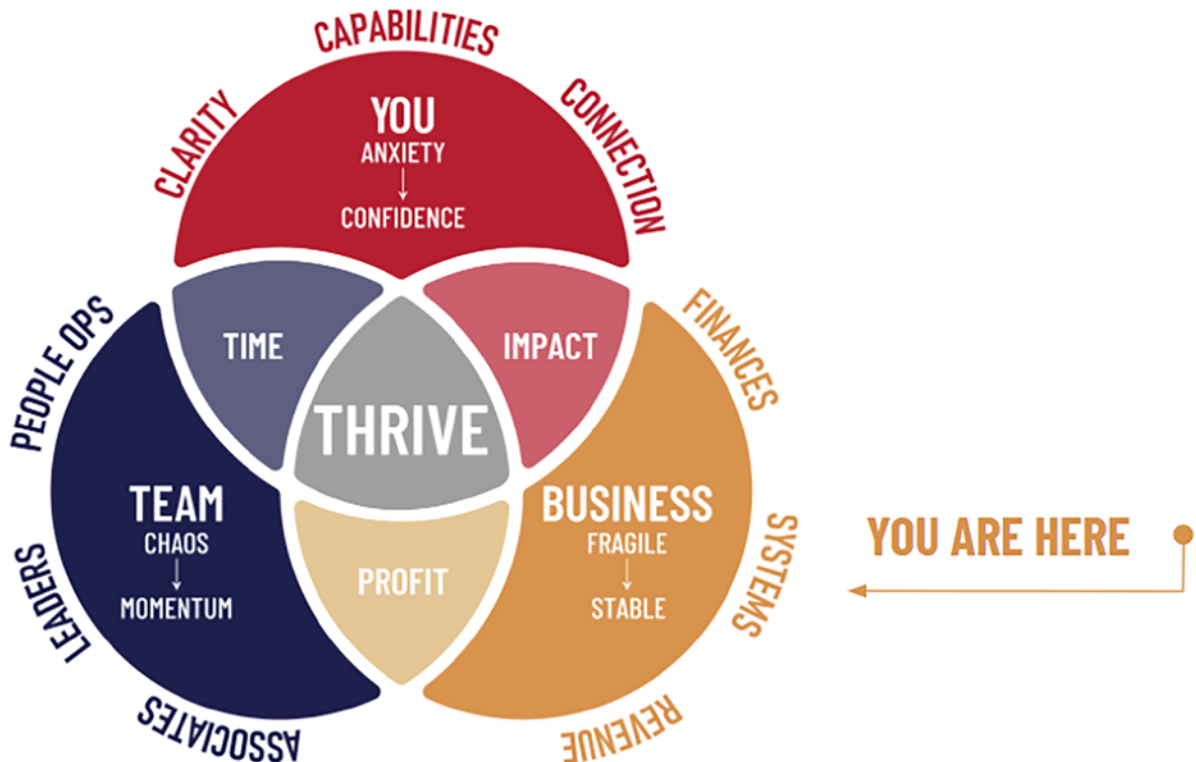
That's not intended to downplay the role of the dentist, but merely to emphasize the incredible amount of support needed to make this work. You can't do it all yourself, so it's important to surround

yourself with capable people and systems to help you take better care of your patients. But even if you hire the best candidates available, it won't matter much without a system in place.

This is why your organization needs an operations playbook.

If you are looking to grow your business long-term, an operations playbook is going to be critical. You will save lots of time, energy and money if you have the right information, coaching, and training at your fingertips. When you build a team to support you and utilize an operations playbook, you are going

## THE DEO GROWTH MODEL



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to see more profit and more impact throughout your organization.

In this article, we will dive deep into what the operations playbook is, how to build one, and the best practices for implementing the playbook for your organization.

### **What is an operations playbook?**

Essentially, an operations playbook is a way to measure your systems. You have likely created systems that are critical to certain outcomes in your business – generating revenue, managing your collections, growing your team, etc. This playbook will help you to break down those systems into different milestones or manageable parts.

These systems need to be broken down so that you can investigate and audit the effectiveness of these systems. Are they driving the metrics that you want? As you begin to use your operational playbook to understand your data and start tracking information in your practice, you will likely find that you are learning for the first time how effective these systems are. For instance, if you discover your new patient numbers are off, what can you do to turn that key metric around?

The important thing to remember is that this is a process of trial and error – you will not get it right the first time. It's going to require you to work through your systems and perhaps discover for yourself what your best practices are. Once you've done that, you need to duplicate it and train the rest of your team so that they have a better understanding as well.

These are all critical questions you can ask yourself as you begin to map out your operations playbook. When you bring on a new office manager, how do they know if the office will be successful? What metrics are they tracking to know? Are you sinking or swimming? If those numbers get to the point that might be worrisome, what are they supposed to do to correct the path forward? Where do they find the numbers? What do they mean? If a number is off, what are they/you supposed to do about it?

**A good rule of thumb is that even if you feel like the playbook is 100% done in your head, or even if you feel like you could take the playbook the rest of the way, let your team take part in this process.**

The playbook is a way to document all that information. When you partner with the DEO, we will give you a template that provides 80% of the information you need – you just have to customize it to your organization. Even if it's a simple one, you are going to get a tremendous feeling of momentum by creating your operations playbook. The perfect playbook does not happen immediately – it needs to be cultivated and allowed to grow into what it can become. There's enormous potential in having an operations playbook – you just have to give it time to grow into its potential.

### **How to build your playbook**

When you begin to build your operations playbook, it's important to

understand that it's less about having a manual for how to run your organization, and more about developing a mindset for your team. What you are trying to build is bigger than just one person's ideas of how a business should be run. This is a process that you are building within your business – it can cover anything from doctors engaging more intentionally with patients or reviewing your treatment acceptance rate.

To start, you need to identify the components of your organization

that you want to focus on in the playbook. Think of things like team engagement, dentist engagement, profitability and patient satisfaction. The playbook is designed to help your team hone in on the priorities you set out for your organization, completely removing any ambiguity over what your practice and your team members need to be successful.

Once you've got these main components that your team is going to focus on, you need to outline what sorts of metrics you are looking for and how you are going to track them. For example, if you are looking at patient satisfaction, how are you going to capture that data? Phone calls? Surveys? Emails? Making a decision at this point in the process

SYSTEM: Revenue Cycle Management				
Metric	Benchmark	Why does it matter?	How do you measure it?	What should you do if it is off?
Co-pay Collections %		Collections at the time of service are critical to healthy cash flow. Our goal should be to collect 95% of the dollars due at the time of service...or even before hand as "prepayment to reserve that time in the schedule"		Focus on payment as patients arrive. Make sure teams are trained and ready to use appropriate scripting. The biggest barrier to "asking for money" is perceived resistance, and this is overcome by great training and practice. Consider prepayment initiatives as well, as these also tend to reduce no-shows and cancellations.
Payments posted within 24 hours	Within 24 hours	When we receive payments from insurance companies we expect them to be accurately posted to the patient's account within 24 hours. This ensures patient charts are as accurate as possible, we do not have money unaccounted for and it allows us to avoid a backlog of work that needs to be done.		1. Set the expectation with the team that 24 hours is the expectation. 2. Evaluate the capacity and workload of the team member- do they have access to the necessary information, do they have time and the space to work through the task? 3. Are the technology, logins and software working together to allow team members to operate in this timeframe? Do we need to re-evaluate our setup and connection? 4. Are we asking too much of one person? Do we need additional team members to support the number of payments received?
AR over 90		AR over 90 becomes much more difficult to collect. Handling AR prior to it reaching 90 days is critical to keeping healthy cash flows.		1) Get serious about cleaning up over 90 AR 2) Are billing statements being sent out? 3) Are claims in need of followthrough? 4) Is the issue a specific payor? 5) Is this a result of bad copy collections? 6) Do we have a collections process in place? 7) Do we have amounts on the books we just need to eliminate?
Same Day Claims Submission, Appeals, and Resubmissions		Time is money, and our practices need to be reimbursed as quickly as possible. Claims, with appropriate narratives, should be submitted the same day the		1) Figure out why claims are being sent or tracked same day 2) Assure that this is someone's responsibility to confirm 3) Verify that our narratives and processes are "best practice" worthy

will ensure that your team is doing this the correct way down the road.

For each component of the playbook, you also need to assign responsibility to each department in your practice. Work with your team to develop an action plan for each system, ensuring that each component fits naturally into the workflow of the department it's assigned to. This process will not only help your team to develop a sense of ownership over this process, but it also helps to establish a sense of accountability over the organization as a whole.

### Implementing your playbook

When you introduce this to the rest of your team, it's important that they feel like they have some sort of agency in how the playbook works. A good rule of thumb is that even if

you feel like the playbook is 100% done in your head, or even if you feel like you could take the playbook the rest of the way, let your team take part in this process. Bring it to them at 80% and let them fill in the last 20%. They need to be able to enjoy it and take ownership over this whole process.

Once you've got it built, you can start to implement some of these processes and begin to measure the metrics within your organization. These aren't metrics that you necessarily have to check each week – check in once a quarter to see how these systems are working for you. If you find that your numbers dip in areas like patient satisfaction, you can address those to be sure that the team is adhering to the structure and priorities of the organization.

Start there and work to build some very concrete goals for how you can get everyone back on track. If you need documentation to help your team at the various touchpoints in this journey, take some time to create the kind of documentation that would make sense for your organization. It all depends on how your team learns best and what they are willing to spend their time on.

The most important thing to remember is that this is going to take time – it's a process that requires a lot of patience and frequent collaboration. But don't be afraid of that time commitment! Building an operations playbook is one of the most valuable things you can do for your organization; it's an investment into the future of your organization, which is worth every moment that you spend on it. ■





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# How to Optimize Your Scheduling

**How to address the critical parts of your workflow and get the most out of your team's schedule.**

**Everyone has a busy schedule, right? The obvious challenge** with a packed schedule is that things can slip through the cracks – it starts with harmless things like administrative duties and phone calls, but it will eventually bleed into other areas of your dental practice. Without a structure in place, the critical parts of your workflow (like billing or even some elements of patient care) can be negatively impacted. This is why your practice needs a schedule optimization tool that will fit the needs of your organization.

It's probably impossible to create a system that would support or serve every single need – with all the different numbers of offices, the different types of clinical care provided, and the different types of specialty, it isn't realistic to say that there is a one-size-fits-all solution. Our scheduling optimization tool may not be a perfect fit for your practice, but it can provide you with some principles and guidelines that can help you to think through your own systems.

If you don't have a dialed-in system for optimizing your schedule every day to make sure that everyone is on the same page, you are missing a huge opportunity. Is there anything more upsetting to operators than when something is not executed well? Is there anything more exciting for operators than when something is built to last and constructed well? At the end of the day, it's all about building the right system for you and distributing it to your team.

From here, we're going to take you through some of our principles for building an optimized schedule





for your practice. This material is designed to help you think about how you can better approach your scheduling processes, giving you a deeper insight into what an optimized schedule should look like while auditing what you already have in place.

### Setting up expectations

First and foremost, your scheduling processes need to align with the performance goals of your practice. Setting reasonable, actionable expectations for your organization is the best way to align the different team members and schedules of your organization to a common goal. Your team needs to know what they are trying to accomplish, and what needs to be adjusted to help them get there. Standardization and consistency will be your allies here, allowing you to project your goals clearly and easily achieve those goals later in the year. You need consistency to help your team deliver on a day-to-day basis.

Another component of establishing clear expectations is showing

what a well-defined schedule is supposed to look like for your organization. You might have a rockstar scheduler who can make sure everything looks good for all the doctors in your office, but what happens when that person gets sick, takes time off, or just quits? A scalable system is one that can be taught to new employees, especially those who are new to the dental industry. You need a tool that can take the institutional knowledge of your best team members and give it to other people, allowing them to step confidently into their new roles.

### Patient-focused and provider agnostic

Any good system in the healthcare or dental space needs to be patient-focused and provider agnostic.

Let's break those ideas down, starting with the focus on the patients.

The patient experience should be the top priority for any dental practice. If your patient experience is lacking in any way, the patients will find somewhere else to go.

Any scheduling issues that affect patients could leave them sitting in chairs for hours at a time waiting for the doctor to come in. How is this acceptable?

Patients want to minimize the amount of time that they spend in dental offices. We have to recognize that we aren't the highlight of their day and respect their limited time. There is a balance to having multiple patients going at once, but it shouldn't come at the cost of the patient experience. Snafus happen occasionally, of course. From there, it's all about communicating to the patient that they may have a longer wait than usual, but you can work to make their time spent waiting more comfortable.

A good schedule optimization process should be able to effectively manage the schedule of any provider, no matter the workload or specialty. Finding a provider agnostic system is key to managing the dynamic and changing schedules of the different providers within your organization. There are plenty of different perspectives on this, as many people operate in environments where everyone fits into the same provider structure – in situations like this, there are often time limits set for each procedure.

This is great for consistency, but it doesn't help providers or patients when they are regimented to certain time frames. With a little more flexibility and consideration for the providers that may not work as fast as others, you can implement a schedule that allows providers to operate within parameters that they are comfortable with.

**PRINCIPLES OF SCHEDULING OPTIMIZATION**

- 1 Aligned with performance goals
- 2 Well-defined
- 3 Provider utilization
- 4 Patient-focused

## Leveraging flexibility

Flexibility is an underrated core value that needs to be leveraged in many areas of the dental industry, but especially when it comes to building schedules. It's easy to be proud of building perfect schedules that optimize your workflows and improve efficiency within your organization – but what happens when it (inevitably) fails? At some point, a stumbling block will cause your perfectly arranged schedule to break apart, and you need to be prepared for when that happens. What would happen if the potential for catastrophe was built into your existing schedules?

What if, instead of panicking every single time that something goes wrong with the schedules, you build in some processes to overcome situations like this? It's easy enough to come up with hypotheticals – broken equipment, patients cancelling appointments, staff needing sick days, etc. There are an endless number of reasons why something would go wrong, which means that you should be ever more vigilant to ensure that you are prepared for any potential situation.

When you can build some flexibility into your schedules, you are giving your team the grace to make a mistake. For example, let's say your team has scheduled your providers to their capacity, filling all the chairs and appointment slots for the day – and a chair breaks. So now you are one chair down, with a full schedule of patients coming in for treatment. Because you haven't allowed for flexibility within your schedule, your team has to scramble to make sure that all of the patients are taken

## PRINCIPLES OF SCHEDULING OPTIMIZATION

- 5 Flexible
- 6 Enable provider productivity
- 7 Shared responsibility
- 8 Reinforced by processes
- 9 Results focused



**It's easy to be proud of building perfect schedules that optimize your workflows and improve efficiency within your organization – but what happens when it (inevitably) fails? At some point, a stumbling block will cause your perfectly arranged schedule to break apart, and you need to be prepared for when that happens.**

care of, or your front desk will have to reschedule some appointments. Neither of these solutions are ideal. Plan for the worst-case scenarios, even if they seem unlikely.

### Share the responsibility

Part of the big opportunity that comes with optimizing your scheduling process is that this is a team effort. Every day during your team huddle, your team needs to examine what is and isn't happening in the office. Hygienists should be looking at their schedule to see if there are potential spots or openings in the schedule. If you have hygienists

who aren't seeing patients at certain points in the day, focus their efforts to see where else they can support the practice. With a downtime protocol, you can ensure that supply closets are stocked, instruments are sharpened, or even follow-calls are made to patients after their appointments.

Scheduling issues affect everyone in the office, which means that an optimized schedule can only benefit everyone. It doesn't matter whether you are setting up downtime protocols for hygienists or ensuring that your scheduling protocols are patient-focused, it will make a huge difference for the rest of your practice. ■



# Using a Coaching System to Empower Your Team

**Manager's can rebuild and repair your company culture by connecting, measuring, and coaching the team members that report to them.**

**Management is a balancing act – while the very nature of your role is to oversee the office and the teams that you are responsible for, most people aren't looking for a manager in today's work environment. They want a coach to help them navigate the dynamics of the dental industry, which means that we need to make a transition in how we lead our people.**

After years of working with team members and doing our best to understand how we can lead them in a meaningful way, we have found that playing the role of coach vs. manager continues to make the most impact inside organizations.

The manager's job is to connect, measure and coach each of your team members. Utilizing this tool for your organization will help you to rebuild and repair your company culture, while positioning your organization to propel forward with a renewed sense of focus.

No matter where you are in the process, there is always room for improvement. We can always get better and grow from this experience. This isn't only the most important thing that you will do as a leader, it's also an excellent tool to use within your personal life.

### The role of the modern manager

One of the first things you may recognize about being a modern manager is that it has evolved into much more of a partnership than a hierarchy. This means that any communication regarding feedback is more of a two-way street, allowing your team the opportunity to give feedback as well. This structured process is a great way to start facilitating a coaching environment.

Based on data collected from a recent DEO event, 60% of the members polled do not have a structured process to provide performance feedback, and 69% of managers are not trained and capable of bringing out the best in their teams. The most revealing part about this data is that such a large majority of managers within the dental space don't feel confident leading their

teams effectively, nor do they have the structured process in place to facilitate feedback.

There are plenty of managers and leaders of dental practices that would talk about the health of their organization through the lens of company culture. But the truth is that if your culture is not helping you drive results, it's not doing its job. Company culture is so much more than free lunches and Casual Fridays – it's the structured process to move people from one spot to the next.

The performance of your team is a significant part of a great culture. You might all like each other and get along, but if your teams aren't engaged with the work and getting results, your culture is not healthy. As leaders, we need to make our expectations for performance clear, while setting up the parameters for what a healthy culture can look like within our businesses. These ideas aren't mutually exclusive! They need each other to truly succeed, which is why Connect, Measure, Coach is such powerful tool for managers.

### Connect

It's impossible to truly separate our work lives from our personal lives. When we are experiencing challenges at home, they usually follow us into work, and vice versa. There is no way to get around the human experience, which means that we need to work to truly connect with our people. We need to find out who they are, what they are interested in, what their goals are, and what's important to them.

## AUDITING YOUR TEAM CULTURE SYSTEMS

**60%** do not have a **structured process** to provide performance feedback to their team members

**69%** of managers **are not trained** and capable of bringing out the best in their team





KPIs against performance, looking for ways to improve and streamline any of the processes that person is responsible for. When you're looking through the "measure" lens, you want to see if your practice has trends going up, even if they aren't hitting the right numbers.

We also measure to ensure that that everyone aligns to the core values of the team. This measure lens is designed to measure alignment to vision, alignment to values, and alignment to KPIs. Alignment is critical to the success of any organization – if your employees aren't aligned to what you are trying to do as a company, it will be much harder to meet your goals and drive productivity.

## Coach

Coaching your teams allows you to identify areas where they can improve, but also how you can provide support to them. With this approach, you can give your team members the space to make mistakes and learn from them. Asking the right questions can help them to better understand what went wrong and how they can navigate scenarios like that in the future.

In order to effectively lead as a coach, it's important to understand the difference between a coach and a manager. The biggest difference between managers and coaches is the mindset – traditionally, managers come to situations with a sense of formal authority over the team. With this mentality, managers often make decisions on behalf of the team. Coaches tend to come to these situations on an equal footing with the team, allowing the team members to make their own decisions,

**THE QUICK CONNECT MEETING**

The **Quick Connect** meeting is just that – it's a **10-minute** check-in with your team members (individually) to see how they are doing, both **professionally** and **personally**. Ideally, this should happen **weekly**, but monthly is okay, too. This is an **opportunity** to see if there is anything that needs to be **addressed** before it becomes a bigger issue.

Use the spaces below to take notes if needed.

TEAM MEMBER NAME: \_\_\_\_\_ LEADER NAME: \_\_\_\_\_  
DATE: \_\_\_\_\_

1. Where is your head **right now**?

2. What is going on in your **life** right now - either **personal** or **professional** that you would like to share?

3. Is there **anything** you need from me that **ensures** you hit your **goals**?

DENTAL PEOPLE REVOLUTION

within the parameters of the values and vision of the practice. Operating with that mindset is certainly not the wrong approach, but it does result in a specific dynamic within the organization.

Amongst many other things, coaches are also focused on the personal and professional development of the people who work for them. Their goal orientation is inclusive of the people who are performing the tasks and processes that achieve those goals, while managers tend to have a

focus on pushing organizational targets. Managers might say you didn't score, while coaches are more likely to help find a different approach.

The bottom line is, if we do a great job at coaching, we have very little to do with managing. Everything else will likely fall into place if you have the coaching approach. As leaders, we have a duty to focus our energy to ensure that we can have the right conversations, cultivate the right relationships, and unlock the potential of our teams. ■



# The Secret to Dental Organization Growth

**Frandsen Dental's Tiffany Fleisch has seen how strong systems can lead to transformational growth.**

**For Tiffany Fleisch, both individual and organizational growth has meant leaning into, rather than avoiding, frustrations. "I think frustrations lead to breakthroughs,"** said Fleisch, Director of Operations for Utah-based Frandsen Dental.

Leaders must be OK with trying something out, and if it doesn't work, going back to the drawing board. "I really don't have a problem in just throwing an idea out there and testing to see how it works."

That mindset helped Fleisch when she jumped from being a dental assistant to a practice leader (office manager) during an economic downturn. It helped as her organization completed two mergers a decade ago (six weeks before she had a baby). And it has been key in navigating a disruptive marketplace over the last few years.

Fleisch isn't afraid of frustration because she's got a secret weapon to combat it – systems. She is a big believer in using systems to try out new ideas and concepts to see how they could make things better for team members, clinicians and patients. "I don't do things the same way I did even two years ago," she said. "There's always so much more to learn, do, implement and try."

In a conversation with *DEO Magazine*, Fleisch discussed how she measures success beyond numbers, and how systems have led to incredible gains in efficiencies for her clinicians and team members.

**DEO Magazine: As a Director of Operations, how do you measure the success of your organization?**

**Fleisch:** We like to look at what we did in the past, because if you investigate today or the future, you're going to constantly feel like there's too much to do. I have lists and ideas for days of all the things we need to do or what's not

## How to Create Repeatable Systems

If systems aren't repeatable, then they're not working for you.

The following are three steps to follow:

**Step No. 1: Identify.** The first step is to identify what core systems you need to implement. Sometimes dental leaders have a big list of all of these systems that they feel are needed. However, you probably only need a handful to get started. Here are four critical systems to consider for a dental practice to run well:

- › Team culture
- › Patient experience
- › Revenue cycle management
- › Project management

**Step No. 2: Document.** Once you identify the core systems, you will want to document them. Keep it very, very simple, using a chronological or linear approach to identify key milestones, benchmarks and KPIs along the way.

**Step No. 3: Package.** After you identify and document, put some visuals together for your team. Package it in an appealing, easy-to-read format. It almost becomes like a little franchise template for your way of doing business, and this is the book that your organization will work from. Systems don't have to be boring. Even a clinical standards manual can be engaging if done right.

perfect yet. But every quarter when we get together with our team, we look at all the things we were able to accomplish, even minor things, and that's been helpful. You don't realize how impactful those accomplishments are until you come back and reflect on them. It gives us more steam to know that we're on the right track.

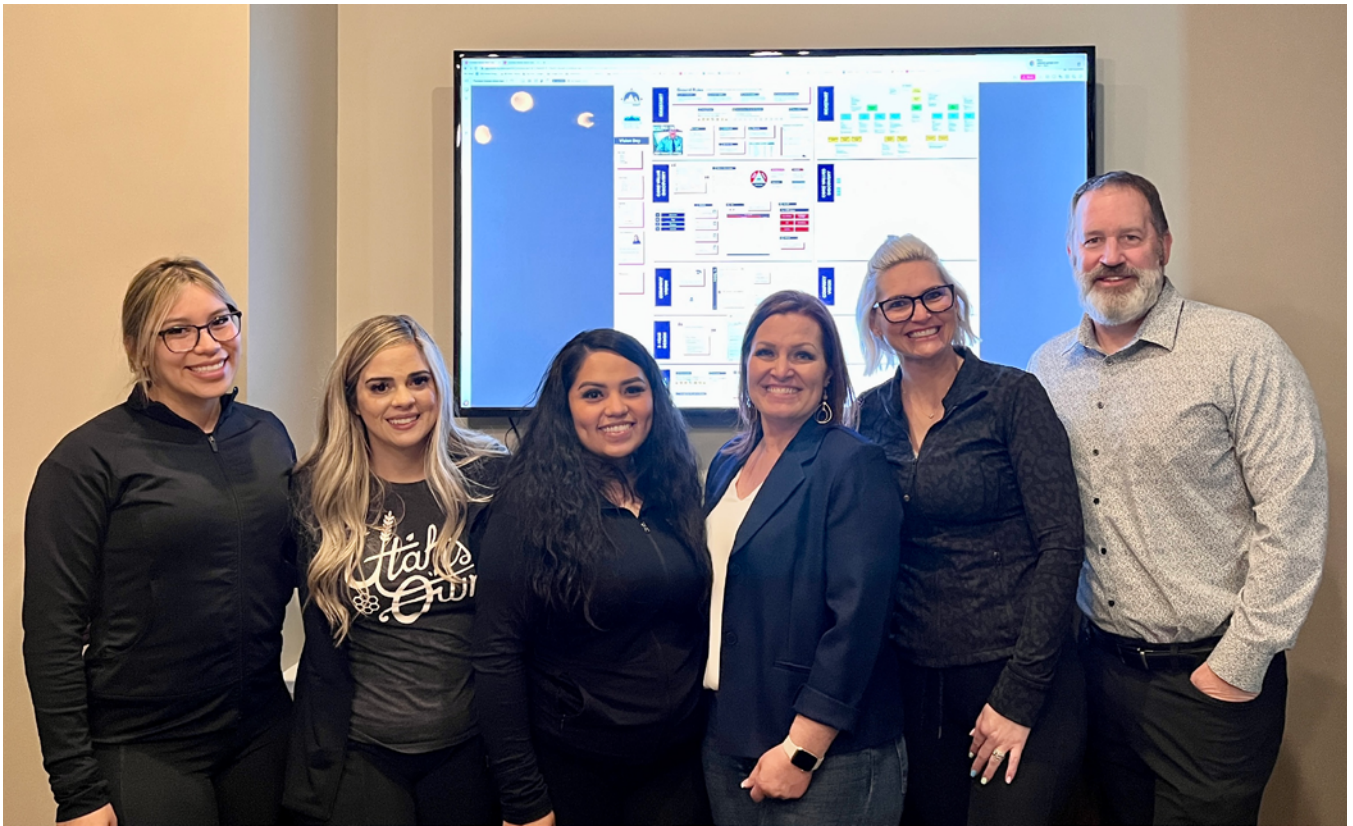
I look at profitability more today. For example, our revenue hasn't crept up the same year-over-year that it has in the past, but our profitability is the best it's ever been. That is a success, because we're actually

getting smarter and leaner with our expenses. You must be patient enough to hang tight to see that what you're doing is working.

**DEO: You've talked in the past about the benefits of using systems to help your organization's cultural growth. But what about the overall benefits?**

**Fleisch:** I love systems. Systems is my love language. You want to plot an Excel sheet and show me a system? That makes me really happy.

Today, we're constantly trying to simplify our systems. How do we



make them easier for the end user, my team members? For my team, I want it to be an easy part of their day. I don't want to stack a bunch of things on them. When we create a system, how do we take 20 steps and cut them down to five? We're constantly trying to look for efficiencies in our systems that make it easier for the team overall. You can always shiny new things to stack on, but what I get really excited about now is, what can I take off?

Doing that with automation helps combat brain fatigue and decision fatigue that my team has to deal with all day long. How can I automate processes and make it easier for them?

You're never done. When we first started this journey, I thought it

would take a year to build our systems. That was eight or nine years ago. Some of the foundational systems we still have are ones I come back to and ask myself, "How do we make that better? How do we take out some of that noise?" So, I think when you realize it's never over, that makes it fun to go back and do it all over again. We get to blow it up and we get to put it back together in a nice, pretty bow.

**DEO: What areas have seen the most improvement over the last few years?**

**Fleisch:** We've done really well in helping our practice leaders identify their problems on their own. Instead of me having to be the one to say, "Hey, your numbers aren't where

they need to be," they've been able to come to our weekly meetings and say, "Here's where my problem is and here's what my solutions are, and what I want to go do and try." So that's been one great thing about the systems.

The other area is training and onboarding. Whenever we have something new that comes out, whether it's a new software or technology, we're constantly asking "How do we roll this out to the test with part of the team? How do we roll this out to our entire team? Where does that go in our onboarding and training and development?"

These systems have created a way to plug and play information in different places, and then also have resources for team members when

they're not in training and they need to just quickly grab that information. They have it at their fingertips instead of having to go dig for things.

I think now my team is used to me challenging the systems. We've

been able to take certain systems and I've been open enough for them to give me their feedback and show them that, when they do give me that feedback, I'm not going to push back on them because it's

my system. I'm going to agree with them, and I'm going to push them even further to say, "Hey, shrink it down even more."

I get asked all the time how my team is constantly coming up with new ideas. Well, they're just used to a "let's try it" mentality, because they know if we try it and it doesn't work, I'm open to scrapping it and moving on. My team has been amazing at implementing and giving feedback of what's working and what's not.

Last year, we started to reduce our PPOs, the insurances that we were in. We're constantly monitoring our insurance reimbursements. If we're jumping out of insurance or taking fewer PPOs and that is raising the fees in our practices, we're trying to find ways to make it more affordable for our patients. So, we are looking at different patient financing options. We don't want to become a bank, but we also see that people need payment plans if they're going to be able to complete their treatment.

And there is always the tech stack. Whatever tech we can find that's going to help reduce noise for the team, not just add another software. It must have an end goal and save the team on efficiency, not just be new, cool and shiny.

**DEO: How do you create benchmarks for evaluating technology?**

**Fleisch:** I'll get the information from the company and, instead of rolling it right out, I put it on the shelf for a minute and then come back to it later on and ask, "Is it as exciting to me now as it was the day I did the demo?" Then we may roll it

## When you don't have systems

When you don't have systems in place, three things happen. First, you are constantly recreating the wheel. During COVID, a lot of dental organizations were surviving without any systems and counting on having experienced knowledge when an individual was hired. Leaders were assuming that because the last person had a skill or experience, they would pass that on to the next team member who took over. But what if they didn't? What if your dental practice is in an area with high turnover, such as a seasonal location or military hub? Several times a year you may have to hire and train new team members. Having a system in place for this allows you to get off the hamster wheel and stay ahead of the problem. It also means you won't be held hostage by a toxic team member that has a ton of institutional knowledge but is hurting your organization otherwise.

Second, if your results are inconsistent, or if you feel like you're putting in a ton of work but not getting the results or the outcomes that you need, it's probably because you don't have great systems. Further, if team member A, team member B and team member C have a high discrepancy in their performance and what they're doing, you probably don't have a system in place. If you do have a system, you're not training to it and holding people accountable. Those are the two pieces of the puzzle. Do you have a system that's effective and are you actually holding people accountable to performance of that system? One of those things is absolutely broken if you're in that scenario.

Third, if you have a team that is overwhelmed, burned out or confused, or the team is just not doing things in the ways that you would expect, it's probably also a system's issue. When building an annual or quarterly plan, many dental organizations will have training as the top priority. But if you ask the leader what problem they're trying to solve with training, can they answer? You have to have something to train people on. Let's simplify and create the systems and train them to the systems. It becomes a lot easier than just trying to train, train, train. Chances are you may not need training; you need better management and better systems.

out a practice or location at a time instead of just throwing it on the entire organization.

You're always going to get a salesperson who's trying to sell you on all the great things that it does, but are they going to open up the curtain and tell you the things it doesn't do? So that's one of the questions I always love to ask, "What are the capabilities that your software can't do?"

What did the tech replace for my team? Does it actually save them time? If it doesn't, then we're able to cross that one off the list. We don't roll it out. Or we'll look at our current software that we have and find

out, do they have features in there that we're just not utilizing?

It comes back to feedback. We will ask our practice leaders with new tech, where is it working and

where is it not working? Then evaluate from there.

**DEO:** What do you think are some of the biggest challenges for dental group practices? What's keeping leaders up at night as we head into 2024?

**Fleisch:** There's always the unknown when things start to slow down. I became a practice leader in 2008 because of the economic crash, and it felt like it happened almost overnight. I was a dental assistant and then all of a sudden, we didn't have patients. Today it has been working through all the different things with inflation and trying to compete with people's dollars.



## Principles of strong systems

The DEO has identified seven principles of strong dental systems:

**No. 1: Strong systems are simple.** There might be some type of visual component to the system, because when we see something visually, it allows us to understand it much faster. How can you break it down more? How can you simplify it to just the very necessary points? Can you remove a step and get the same outcome? If so, do it. The step was no longer necessary.

**No. 2: Strong systems are adaptable.** Whether that means you must make a slight adjustment because technologies changed, or you have to make a massive adjustment because some external circumstances shifted, a strong system adapts. Whatever it might be, you must think of your system as something that is constantly evolving. That's a great way to keep your teams engaged in what's happening when they feel like they have ownership over the system and the ability to make it better.

**No. 3: Strong systems promote efficiency.** If they don't, what is the point? You should continually seek ways to save time and energy and make things easier for your team. Also remember that efficiency comes from minimizing waste. If we can decrease the amount of thought process that goes into things so team members know immediately what to do, that helps save so much energy.

**No. 4: Strong systems are integrated with one another.** They should not be counterintuitive. Rather, they should integrate and support one another.

**No. 5: Strong systems are transparent and easy for people to understand.** Don't make things super complicated. Complexity dilutes the power of systems. Dial things back to just the core pieces that are understandable for everybody.

**No. 6: Strong systems are scalable.** They should serve you today, and tomorrow. You shouldn't have to be recreating the wheel every time you add a new person or have an increase in patients or locations.

**No. 7: Strong systems are user-centric.** The last thing to consider is that the systems should be built around the people that are operating them. So often we think about it as our end customer of the system is our patient. We actually need to focus on the individual that's operating the system, that they're able to do it effectively, comfortably, and that they can also be at the center of the experience to make sure that they are watching what's going on, seeing the end result, and have the ability to see when perhaps maybe we're not getting what we expected out of the system.

But you can't lose sleep over the unknown. You just must keep pushing forward and asking, "Are we doing the things that are really going to create the most impact? Are we helping out the patients? Are we helping out the team?"

Am I making it easier for my patients to do something, whether

it's consent forms or payment plans? Am I making it easier for my team to have fewer steps? I think those are the things that are going to help us in the end. But yeah, what keeps us up at night is always that unknown of what's coming into next year.

We still have lots of burning fires. If everything was rainbows and unicorns, that would be amazing, but I think a few burning fires are kind of fun. It keeps it spicy. You don't get bored. You can say to yourself, "All right, let's put on our parachute, jump in, and go fix it." ■

# A Systems Mindset is Key to Successful and Sustainable Growth

DEO's *10 Critical Systems Every Dental Group Should Implement* can help you ensure you have the right systems in place.

BY LAURA BOWLES, DEO

**How are you approaching the sometimes overwhelming challenges of your day-to-day operations?**

DEO has found it incredibly important for any dental entrepreneur's growth journey to have a "systems mindset" to be set up for long-term success.





W. Edwards Deming, an American engineer, statistician, and management consultant, said: “If you can’t describe what you are doing as a process, you don’t know what you’re doing.” But, this idea can seem daunting. DEO can help with the expertly curated resource: *10 Critical Systems Every Dental Group Should Implement*.

Seeing things through a systems mindset can shift the prism of perspective for your leadership, management, and team. DEO has seen this through its connections with members, some of the country’s most successful dentist entrepreneurs, and DSO leaders. If any business needs operational systems to thrive, it’s dentistry because quality patient care and safety are on the line.

First, a definition: What is an operational system? An operational system is any method, component, information technology (hardware and software), and/or equipment necessary for the operations and maintenance of a dental practice. They are checklists, SOPs, documented processes, documented accountability, practice management systems, etc.

For your growing dental organization, systems provide clarity to help ensure everyone involved contributes to the success of your practice.

W. Edwards Deming also said, “A bad system will beat a good person every time.” If you don’t have SOPs and systems established to handle everyday tasks and everyday issues arising, it doesn’t matter how motivated and talented your people are – they will hit roadblocks.



### Insurance Eligibility Verification

This costs more time than any other task in the office. Streamlining this process with properly trained staff is a must. For larger practices, outsourcing can be an appropriate solution. Weigh the pros and cons and identify the roadblocks that come from not having this task done effectively or on time. By doing this internally, does it deduct from the patient experience? If yes, this needs to be addressed immediately.

For more, check out *10 Critical Systems Every Dental Group Should Implement*, curated by DEO’s dental

## If you don’t have SOPs and systems established to handle everyday tasks and everyday issues arising, it doesn’t matter how motivated and talented your people are – they will hit roadblocks.

Prevent missteps and frustration ahead of time by creating operational systems even for processes that seem minor.

### Here are just a couple of the key systems DEO recommends.

#### The ‘Patient Experience’ From Check-In to Check Out

Patient retention and referrals are the direct goals of implementing a ‘Patient Experience’ SOP. Structuring this step by step and role-playing with the team is critical. Do they understand the why behind this? Make this process crystal clear and help them understand that patients pay their salaries. If the schedule is empty, there is no work to be done.

experts from working with the top dental entrepreneurs. There’s no fluff here – you can rely on the 10 systems within are “musts”.

Having the right systems in place will help your team and associates provide best-in-class patient care, and in turn, increase your bottom line and achieve the goals necessary for your growth vision. ■

For more, scan the QR code below to get your free copy of the *10 Critical Systems Every Dental Group Should Implement*.





# Getting the Most Out of Your Team

How to use systems to turn scoreboard data into positive change within your organization.

**There's no 'I' in team, as the saying goes, but with today's workforce dynamics, leading a successful operation for dental leaders comes with its share of pitfalls and headaches.**

For some dental leaders, it may feel as though right when an employee is fully trained, they decide to leave, and the training process must start all over again. Or, the frustration is when employees that are trained and aware that tracking certain goals and maintaining them is important may be

unable to take the actions necessary to get a desired outcome. Perhaps worst of all is the scenario of a high-performing but toxic team member who has the expert knowledge needed to operate a part of the business, but is holding the organization back with demands or disgruntled behavior.

If, however, a team has an outlined set of steps they can take to achieve desired outcomes, then the operation to get there can become more “automagic” for everyone. Indeed, a clearly defined operations playbook built to achieve desired solutions within a dental practice will give your team more clarity, empower them with decision-making abilities, and provide actionable steps individuals and departments can follow to solve problems on their own. These systems give staff

a framework to make numbers and data within a dental practice go from red to green.

### What are the benefits of workplace systems?

These systems, better known as an “operations playbook,” are similar to the idea of a playbook used by athletic teams to run plays and refer to when adjustments need to be made. The operations playbook outlines what a company should

focus on, act toward, and improve on to get to “win” in business.

Leaders often tell employees to work harder, without giving them specific action items to complete. With an operations playbook, teams and individual employees can have a better understanding of how to succeed within their positions and as a business. Creating a playbook moves the business forward, allowing leaders and office managers to focus on other aspects of the business instead

of always having to train, retrain and micro-manage employees. Instead, dental teams will know what their day-to-day actions are and steps to take to address a problem.

### Actionable information

An operations playbook is simply a set of responses to conditions within the workplace. To start developing a playbook, dental leaders should brainstorm common tasks that teams should accomplish throughout the day. Document them in writing, and start by giving teams a list of when X occurs, do Y.

Another way to think of it is when life gives us lemons, dental leaders show their teams how to make lemonade via the playbook. The idea here is that ‘lemons,’ or actionable work items, are presented every day. Dental leaders should show their employees how to turn these opportunities into ‘lemonade,’ or achieving desired outcomes, so that everybody can perform at the best of their ability.

A strong operations playbook establishes standards for quick, actionable, and timely data. Data in a dental operations playbook should be reactionary, and documented quickly. This system can be set up in advance for staff, so that they know what is expected of them on a daily or weekly basis. Dental leaders can then meet with managers to do an audit, either weekly, once a month, etc., where they pull the data that has been measured, and determine steps to take going forward. The leader in this case may decide to make a coordinated plan to follow up until the team has the data.

Which metrics would you like to include in your playbook within each of the systems you selected?

REVENUE CYCLE MANAGEMENT		TEAM CULTURE	
<input type="checkbox"/>	Co-pay Collections %	<input type="checkbox"/>	% Team Members with 1-3 KPIs
<input type="checkbox"/>	AR under 90 as a Percentage of Production	<input type="checkbox"/>	% Team Members with Quarterly Check-In in Last 90 Days
<input type="checkbox"/>	AR over 90	<input type="checkbox"/>	Employee Net Promoter Score (ENPS) & Doctor NPS
<input type="checkbox"/>	Same Day Claims Submissions, Appeals, & Resubmissions	<input type="checkbox"/>	% Team Members with Career Development Pathways
<input type="checkbox"/>	Write-off %	<input type="checkbox"/>	% Team with Updated Job Descriptions
<input type="checkbox"/>	Days of Sales Outstanding / AR Days	<input type="checkbox"/>	% of Org Chart Completed with Positions, Roles & Responsibilities, & KPIs
<input type="checkbox"/>		<input type="checkbox"/>	% of Managers Having Regular 1:1 Meetings with Direct Reports
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
PATIENT EXPERIENCE		<input type="checkbox"/>	
<input type="checkbox"/>	Call Conversion		
<input type="checkbox"/>	Next New Patient Appointment / Recare Appointment	<input type="checkbox"/>	
<input type="checkbox"/>	Average Case Presentation \$\$\$ by Provider	<input type="checkbox"/>	
<input type="checkbox"/>	Average Case Acceptance by Provider	<input type="checkbox"/>	
<input type="checkbox"/>	Patient Growth / Attrition	<input type="checkbox"/>	
<input type="checkbox"/>	Google Reviews	<input type="checkbox"/>	
<input type="checkbox"/>	% of Patients with a Next Visit		
<input type="checkbox"/>	Annual Patient Value	<input type="checkbox"/>	
<input type="checkbox"/>	# of Leads	<input type="checkbox"/>	
<input type="checkbox"/>	Hygiene Reappointment	<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	

If a scorecard item is off, the first step is to identify all the actions that could move the number from off to on. Then, leaders should take it one step further, putting those items in order of operation from the most effective to the least effective. Don't save the best play for the end of the game in this case – run it right away to get everything done. Typically you'll be able to solve the problem in the first, second or third action.

The playbook can be adjusted when employees have tried an action many times and are not achieving the desired outcome. Certain steps can also be designed to be delegated to other employees and applied throughout the company to ensure both leaders and team members are contributing to the ultimate outcome.

The practice's playbook should be available to everyone, easily accessible, and part of an employee's onboarding, regular training procedures, and something that everyone at the company refers to so that everyone is up to date and achieving their KPIs. The playbook can be a piece of paper sitting at the front desk, an online document, an icon on each employee's computer, or whatever works best that allows the steps to be readily available when needed. Once team members follow the playbook two or three times, it becomes second nature.

### **Customized data**

Production equals patient care. Help bring that to life within the company's playbook by allowing creativity in the structure and goals of the guide. This can be achieved by incorporating a company's unique core



## **A strong operations playbook**

- 1 Establishes standards for timely data
- 2 Identifies actions you take to move data points from off to on
- 3 Puts the actions in order from most important to least important
- 4 Is available to everyone who needs to use it
- 5 Sets the expectation that those actions will be taken before your team talks to you about a number being off.

values, vision, or overall culture into the daily operations.

For example, if there was a step in the playbook relating to patient experience, such as call conversion or scheduling, an employee could tie that step back to the company's overall vision of creating impressionable and lasting impact with patients.

It is important to focus on bringing your company values to life through the goals and business operations outlined in the playbook. Implementing these measures steadily, and not overwhelming the staff members with all of them once, is also key.

Implementing a playbook with a team is a collaborative process.

Inform your team of the reasons for the operations, and ensure they understand why it is being implemented. Also, engage team members by asking what they think could be introduced to make their jobs more systematic. Ensure that the operations are being implemented to help them, and not make their jobs harder.

Working through implementing changes with staff, sparking motivation and excitement as leaders, aligning it to the company's overall vision, and understanding staff's needs and what's important to them will all help a practice achieve success when implementing systems. ■

# The Disney of Dentistry

How Dr. Mark Farina has created an appealing treatment journey for patients.

BY JENNA HUGHES

**Dr. Mark Farina's aspiration to become a dentist and orthodontist took shape** at an early age. His father, who was a mechanic, provided him opportunities to work with his hands during his teenage years. During this same time, his childhood dentist encouraged him to harness his interests to pursue the field of dentistry. He never looked back.

As a pre-dental student at Boston College, Dr. Farina got the opportunity to shadow an oral surgeon in the operating room and, intrigued by the operating room and the surgeon career path, decided to

apply to dental school at the University of Pennsylvania to pursue an oral surgery career.

But during his third year in dental school, while conducting an emergency procedure at the hospital,

Dr. Farina came to the realization that the job's high stress level, associated risks, and time spent away from his wife and family necessitated a reevaluation of his future career goals.

"I spoke with my advisor about a career change, and he persuaded me to apply to orthodontic school. I got in right after dental school, and then went on to NYU's post-graduate orthodontics program. I graduated from there, and have been practicing



orthodontics for 29 years since,” said Dr. Farina.

### The practice

Dr. Farina is the founder of Farina Orthodontic Specialists, which has expanded over the years to three Florida locations in Wesley Chapel, Tampa Palms, and South Tampa. At the practice, the primary services offered by orthodontists include braces, Invisalign, retainers, and more.

“One of our core values is to ‘wow’ our patients with service and smiles. We are constantly working on our core values as a company. As a team, we live and breathe our core values; and we hire, fire, reward, and recognize through our core values,” said Dr. Farina. “Company culture is very important to the success of our practice and team.”

Upon entering the office for treatment, patients are warmly greeted by the “Directors of First Impressions,” also known as the front desk staff. Subsequently, patients proceed to the acquisition and record center for photos, iTero scans, or X-rays. Following this, they proceed to the treatment coordinator’s room to confirm their records and formulate a treatment plan for either Invisalign or braces.

“At our practice, we love to celebrate and consider ourselves the ‘Disney of Dentistry.’ When patients come in, we are genuinely excited to see them and aim to motivate them by celebrating their treatment journey,” said Dr. Farina. “We’ve introduced interactive games at our office like the ‘Wheel of Wow’ or ‘The Smile is Right’ to allow patients to mark

their milestones. When getting their braces off or finishing Invisalign, our patients celebrate their new smile with music, excitement, and festivities. We thrive on creating a high-energy atmosphere, ensuring that every patient departs with a unique and fun experience at the orthodontist.” These attributes have led Dr. Farina to be voted by his peers as the Top Orthodontist in Tampa Bay.

### Virtual orthodontics

During the COVID-19 pandemic, many dentists and orthodontists faced challenges operating in-person during the global health crisis. With 40 team members to support and critical oral care to provide, the team at Farina Orthodontic Specialists didn’t have the option to slow down. To overcome the challenges



created by the pandemic, the Farina Orthodontic Specialists developed a virtual care model for patients.

Dr. Farina explains, “We started seeing our patients online through Zoom and other virtual platforms, and that program developed into a comprehensive virtual model. This virtual care approach has proven a valuable addition to our already successful practice. Over the past two to three years, it has enabled us to double the size of our practice.”

Since then, the company has expanded and refined its virtual care program. Patients can now access preliminary orthodontic services through Facebook or Instagram ads that catch a potential patient’s attention and guides them to medical forms for further evaluation and services.

After gathering new patient information, a doctor at Farina Orthodontic Specialists reviews the data and provides the patient with details on required services, anticipated treatment time, and estimated treatment cost. A patient then has the option to proceed by scheduling an in-office appointment for treatment and a discussion of their treatment plan based off the patient’s initial online submission.

The success of this program inspired Dr. Farina to launch a virtual dentistry/orthodontic care consulting company called Ortho Synergy that assists practitioners in the industry to “build their practices through the new virtual care model,” said Dr. Farina.

### **Community involvement and future plans**

The team at Farina Orthodontic Specialists actively engages with the



local community, participating in various areas such as schools, sporting events, theatre, and outreach. The practice contributes both time and financial support to local organizations, and it also extends its philanthropic efforts to national non-profit organizations such as Girl Scouts of America and Race for the Cure.

Additionally, Farina Orthodontic Specialists runs a community giveback program called “Smiles for the Soul,” which allocates funds for orthodontic care to individuals who require financial assistance. Eligible candidates can be nominated to the program or apply directly for support to access orthodontic services.

“We never turn away a patient that comes in for care and asks for support. For years, we have always supported patients that come in and ask for care,” said Dr. Farina. ““Smiles

for the Soul’ dedicates free orthodontic care to patients in need. Word spreads about these services, and it has helped our practice become a place of positivity that encourages the community to seek care and bring light to their day when they come and visit us.”

Farina Orthodontic Specialists continues to hire and incorporate new doctors across their three practices, mentoring them to become the next generation of leaders and the future of orthodontics.

According to Dr. Farina, “As a practice, our goal is to grow, improve technology, and give back to our patients and community, ultimately striving to make a better world – one smile at a time. I love what I do, and I want to continue to grow and develop the field of orthodontics. I’m just so blessed to be in this profession.” ■

# Tactical Solutions for Operational Excellence

How to capitalize on key moments during the day for effective team communication.

**For dentists, the day-to-day juggling act of caring for patients while running a business can feel overwhelming at times.** Indeed, patients are going to remember how it felt to be in the chair both physically and emotionally, and that requires dentists to be performing at their best. Meanwhile, dental teams need consistent progress checks and clear communication among all team members to perform at their best.





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As dental practices grow, establishing a priority level for communication is crucial. Clear and consistent communication among team members should be happening throughout the day so that each practice hits targets and continues to grow. Ensuring effective communication requires that dental practices be intentional about it not only periodically, but throughout the entire clinical day.

For dentists, to ensure that a dental team is running the day and that the day is not “running them,” everyone should know the goals when they arrive to work. Each team member should be focused on the same outcomes and goals, should show up prepared, be ready to communicate openly, honestly, and frequently, and each team should have the ability to make any adjustments necessary.

Read on for a set of systems and tactical approaches that can assist dental teams with effective communication throughout the clinical day.

### **The morning huddle**

Dental teams should begin each day with a morning huddle. A morning huddle should be short and sweet, 15 minutes or less, so that staff members remain engaged. Each team member should have a role within morning meetings. Once the meeting begins, there should be an expectation that each team member has adequately prepared and is ready to start the workday.

Encourage team members to come to the morning meeting prepared and on time. Dental leaders should make it obvious how important

the meeting is. Some ideas to exemplify that the meeting is important include locking the door when the meeting has started, not allowing people to eat breakfast or do their makeup, and having staff stand instead of sitting.

**Patients want to be able to trust their dental team, which is also important for case acceptance. Case acceptance doesn't always depend on if the patient has the right financing options or the verbal skills of the treatment coordinator.**

In the morning meetings, dentists can discuss their clinical work coming up that day. The rest of the teams can communicate about the practice's background information, such as cancellations, appointments, etc. Each morning, practices should change leaders and rotate roles, so that everyone on the team knows the order of operations and can get used to leading the huddle.

Prep work also includes looking at the schedule to identify opportunities for the dentist, the dental hygienists, and assistants. If there are unscheduled treatments, dentists may be able to transfer those over to the doctor or add treatments to already existing patient appointments. Adding new treatments is an opportunity for a practice to maximize revenue potential.

To fill holes in the schedule, team members should see if there are additional treatments that can be done on that day. Likely, there is a list of unscheduled patients that

front office staff could get back in the office with a few calls. It is important as a practice to know what percentage of patients have a next appointment, and getting already existing patients to come back is part of that number. Prep work can also include

checking voicemail at the beginning of the day to not miss any opportunities for patient appointments.

Teams should also discuss at meetings a recap of the previous day, wins and practice improvements, outline what the team is doing throughout the day, and determine if there is anything to do to get ready for tomorrow.

By implementing morning meetings within a dental practice, team members have an opportunity to discuss data points that can be improved and other strategies to enhance KPIs. Dentists and team members can feel free to add their own personality to each morning meeting, such as playing music, increasing the team's energy levels by having an upbeat and fun attitude, and starting on time to allow staff to be motivated and start the day on a high note.

### **Choreographed handoffs**

Throughout the day in a dental office, there are many points where a patient



is handed off to another team member. The front office, hygienists, and the doctor all have the opportunity to positively interact with a patient before they complete their appointment.

All team members should start patient interactions with a positive, high-quality introduction, and then summarize any pertinent information and the intention for being together. Make sure that both the patient and doctor feel comfortable, and have all the information they need, before completing a handoff.

As a patient, continually telling each person you interact with why you are there and what brings you in for an appointment decreases confidence in the team's ability to coordinate and collaborate.

Patients want to be able to trust their dental team, which is also important for case acceptance. Case acceptance doesn't always depend on if the patient has the right financing options or the verbal skills of the treatment coordinator. Case acceptance often increases when a patient feels heard, taken care of, understood, and when the patient has confidence in the doctor. Effective communication among teams will help ensure patient satisfaction.

To be successful with handoffs, try to take the energy and power that other team members have created and "hand" it to the next person, so that the hygienist or other staff members aren't starting the new patient interaction from scratch.

Keep the momentum going, such as with the handoff in a race – don't slow down during the transition.

### **The end-of-day process**

The third tactical touchpoint for better communication at a practice is end-of-day checkouts. An end-of-day checkout is less formal than a morning huddle. Dental leaders should ask the team what went well, what could have been done differently, to evaluate if targets were hit as a team, and if there is anything else that needs the team's attention from that day. If a dentist is working with dental assistants, this is also a great time to provide them with feedback and training.

Taking home the stress or negative energy from the day is not healthy for anyone. The checkout

method is an opportunity to close the workday out in a positive manner and remember what went right, instead of focusing on the negatives. It is also an opportunity for team members to consider adjustments and improvements to their job performance.

There's a lot of tactical value to team checkouts, as team members have the ability to ask questions and discuss with dentists what everyone (including the dentists) could have done better. By modeling vulnerability as a dentist, and asking for feedback, the rest of the team will follow along, and there will be team

permission to engage in coaching. As time goes forward, power can develop inside of team relationships that assist with better communication and clinical outcomes.

Any form of huddles or meetings that dental teams engage in will help a clinical office to perform better. Team check-outs are an opportunity to build trust, connect, learn from each other, and provide great feedback for the day. They also develop a cadence and a flow of constant communication.

Morning huddles, better hand-offs, and end-of-day checkouts are all tactical touchpoints that dental

practices can implement to increase the effectiveness of overall office communication. Starting with one of these strategies in your practice is a great step toward a more successful practice and business overall.

Running a successful business is not always dynamic and innovative; it is often about simply doing the fundamentals well and consistently. These are the fundamentals that DEO uses, and with them, a day leads to a great week, a great week leads to a great month, to a great quarter to a great year, and so on, and a dental practice's vision comes to life. ■

## Be on your game

A way to think of clinical time for a dentist is to consider time with patients as "game day," where a dentist or staff member is performing at their best for all their patients. In terms of communication, sports teams often meet throughout the competition, with the team checking in or huddling with the coach periodically to see what adjustments need to be made to perform better. At the end of a game, the team meets to reassess and evaluate what they learned, what they can do better going forward, and what adjustments need to be made. The same goes for the dental profession. Without consistent check-ins and team communication, it can be difficult to be successful throughout a clinical day.





# Elevate Patient Experience, Improve Margins, and Improve Workflow with Remote/Offshore Teams

How remote teams can be difference makers for today's DSOs.

BY JW OLIVER, MANAGING PARTNER, SUPPORTDDS

**Dental Service Organizations (DSOs) are revolutionizing the dental industry, streamlining operations, and enhancing patient care.** One of the key strategies that has significantly contributed and will contribute more as we see margins squeezed and interest rates soaring, is the success in the utilization of remote and virtual teams offshore. This approach has proven to:

> Elevate the patient experience   > Drive cost efficiencies   > Optimize workflow   > Foster greater patient retention.

In today's interconnected world, remote teams have become a game-changer for DSOs. Leveraging offshore talent allows these organizations to tap into a global pool of skilled, educated, and English-speaking professionals; enabling access to specialized expertise that might not be available locally or has become cost prohibitive. This access to a diverse talent pool empowers DSOs to improve the overall quality of patient care.

Cost reduction is another significant advantage of utilizing remote teams offshore for DSOs. By outsourcing certain administrative and back-office functions, DSOs can effectively lower operational costs up to 70% without compromising on quality. Offshore/Remote teams often offer cost-effective solutions, enabling DSOs to allocate their resources more efficiently, ultimately leading to better financial health and sustainability.

Workflow optimization is crucial. Remote teams play a pivotal role in achieving this goal for DSOs. Offshore teams can handle roles and responsibilities such as:

- › Revenue Cycle Management
- › Re-care and Reactivation programs
- › Direct of First Impressions (new patient calls)
- › Appointment Confirmation and Scheduling
- › Accounting/Payroll Support
- › I.T Support Teams
- › Marketing Support
- › Executive Assistants and Administrative support

This allows on-site staff to focus more on delivering personalized patient care and being patient-centric. Adding a bi-lingual team member can also elevate and improve the patient experience, especially with the increase of the Spanish-speaking population. These streamlined remote/virtual workflow solutions result in increased operational efficiency and allow dental professionals to

concentrate on what they do best – catering to their patients' oral health needs.

Moreover, the integration of remote teams enhances the overall patient experience. With efficient backend processes handled by offshore teams, patients experience smoother appointment scheduling, quicker responses to inquiries, and more personalized interactions during their visits. Patient retention is a critical metric and DSOs can significantly boost retention rates by leveraging remote/offshore teams. Enhanced patient experience, cost-effectiveness, and streamlined workflows all

## **Adding a bi-lingual team member can also elevate and improve the patient experience, especially with the increase of the Spanish-speaking population.**

contribute to creating a positive perception of the dental practice. Satisfied patients are likelier to remain loyal to a dental service provider that consistently delivers high-quality care and exceptional service.

However, while the benefits of utilizing remote teams offshore for DSOs are substantial, addressing potential challenges is crucial. Effective communication and collaboration between on-site and remote teams are essential for seamless operations. Additionally, ensuring compliance with data security and privacy regulations is imperative when handling patient information.

Incorporating remote teams offshore into DSO operations presents a myriad of opportunities to elevate patient care, reduce costs, optimize workflow, and increase patient retention. By strategically integrating offshore talent and resources, DSOs can achieve operational excellence while placing patient satisfaction at the forefront of their services. ■



**J.W. Oliver Jr.** is the Managing Partner for SupportDDS. They offer "Insourcing" services to DSO's and Dental practices with centers in Africa and Central America.

# Top 3 Mistakes Dentists Make When Affiliating with a DSO

BY BRANNON MONCRIEF, PRINCIPAL, CEO, MCLERRAN & ASSOCIATES



**Affiliating with a DSO is one of the most impactful decisions a practice owner will make in his or her career.** Therefore, it is imperative that dentists get educated about the options available in today's marketplace and make intentional, pragmatic decisions to ensure their objectives are fulfilled and life after the sale is enjoyable. If done properly, a DSO affiliation can be financially rewarding, unlock significant wealth creation opportunities, and improve both the seller's quality of life and practice performance.

However, significant adverse ramifications can occur if this process is not handled with deliberation and care, including financial hardship, loss of autonomy (both clinically and operationally), and decline in professional fulfillment. In this article, we explore the biggest mistakes dentists make when partnering with a DSO.

## **No. 1: Responding to unsolicited offers/failure to create competition**

If you own a successful practice, we have no doubt that you have been inundated with direct mail, email blasts, or cold calls from DSOs expressing an interest in purchasing your office. Most established DSOs have built an entire business development team focused exclusively

on pursuing acquisition opportunities and courting potential sellers. In addition, many DSOs financially incentivize doctors to refer their colleagues in exchange for substantial referral fees. The goal of these solicitations is simple ... to pique your interest and open the door to an initial conversation that eventually leads to you selling your practice without obtaining proper representation or "shopping around".

While a DSO affiliation may be a viable option and an unsolicited offer can seem attractive at first glance, it is important to acknowledge that DSO buyers are not altruistic in their approach. The truth is that DSOs want to buy your practice for the lowest valuation possible, which leads to higher returns for their private equity investors. You would do the same if you were in their shoes. That said, it has been eye opening to see how much more DSO buyers are willing and able to pay for practices when they are put in a competitive situation and you have an experienced sell-side advisor negotiating on your behalf. Entertaining offers from multiple buyers also provides you with a clear perspective on the various options available and the ability to choose the right DSO for your practice from both an economic and fit perspective.

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The bottom line: If you fail to create a competitive environment for your practice and respond to an unsolicited offer, you will accept a lower valuation and leave deal terms on the table that you could have cultivated by taking a more thoughtful approach.

### **No. 2: Selling to the wrong DSO**

We find ourselves saying this frequently, “If you have met one DSO, you have met one DSO.” The consolidation of the dental industry has accelerated beyond anyone’s expectations in recent years. As a result, there are a multitude of new and established DSOs searching for practice acquisition opportunities, each with their own distinct history, culture, executive team, investors, infrastructure, management style, deal structure, financial outlook, etc. Some buyers have robust infrastructure while others have little to none. Certain buyers have a heavy hand from a managerial perspective while others are more hands off. Many buyers offer the opportunity for the seller to retain/roll equity and participate in the financial upside of the business post-closing, while others don’t provide any wealth creation opportunities outside of the initial practice valuation.

Each practice owner has unique personal and professional goals they want to achieve. Should a DSO affiliation make sense, defining those goals and choosing the right DSO partner who can help achieve them is critically important. As you can imagine, partnering with the wrong DSO can have grave consequences for you and your practice both economically and emotionally. Unfortunately, we hear stories all too often of a doctor who responded to an unsolicited offer and sold to a DSO without exploring their options, only to realize that a DSO sale was either not the right fit for their situation or their post-closing work environment was far from ideal (not to mention the practice likely sold for less than its true market value). All of this is to

say – do your homework and evaluate your options so you are ultimately in the position to choose THE DSO that is the best fit for you and your practice.

### **No. 3: Failure to obtain proper representation**

Failing to obtain proper representation is one of the most common mistakes we see practice owners make when pursuing a DSO sale. With so many DSO buyers looking to acquire practices and soliciting sellers directly, many practice owners feel they can navigate the sales process on their own and save themselves a commission. Unfortunately, that “savings” typically comes at an enormous cost. As we have outlined, the reality is that affiliating with a DSO is both a rewarding and treacherous journey that will have lasting implications for you and your practice.

Therefore, the decision to partner with a DSO should not be taken lightly. Engaging an experienced sell-side advisor to serve as your advocate, protect your best interest, and help you navigate the process from start to finish is a fundamental element to achieving a successful result. Once you have accepted an offer, it is also critical to engage a dental attorney who has a significant amount of experience in handling DSO transactions and consult with your accountant to minimize the tax implications associated with the sale.

### **In conclusion**

Pursuing a DSO affiliation is a challenging and potentially rewarding endeavor that requires serious deliberation and a disciplined approach to the sales process to ensure that you maximize your return. The exciting news is that there are a multitude of viable options available and dental practice valuations have recently reached an all-time high. Therefore, it is an ideal time for successful practice owners to consider partnering with a DSO. ■



#### **Brannon Moncrief**

has over 20 years of dental industry experience as a banker, practice broker, and sell-side advisor. Brannon is the Principal, CEO of McLerran & Associates, a nationwide firm specializing in providing sell-side advisory to large dental practice owners (and specialists) seeking a DSO affiliation or private equity partner.

# How Utilizing Diagnostic AI Can Drive Down Costs

**AI has the potential to transform the dental industry by improving patient outcomes, increasing efficiency, and reducing costs.**

**Integrating Artificial Intelligence (AI)** in healthcare software is no longer just an innovative option – it's a necessity. AI brings advanced data analytics capabilities, enabling real-time processing of complex datasets, from patient

records to imaging. However, it can be confusing to know what the best options for dental practices are due to the widespread misinformation surrounding AI.

To help combat that confusion, Brian Colao, of Dykema, facilitated

an exclusive DEO Member peer discussion where they discussed diagnostic AI – what it means for dental organizations, its opportunities, pitfalls and proper utilizations. The following are key points that came out of that discussion.





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## **What is diagnostic AI technology?**

Diagnostic AI in the dental industry is a technology that can evaluate patient X-rays. A patient's X-ray can be overlaid with AI software, and then the X-ray can be evaluated and diagnosed at a much higher degree of accuracy than solely human analysis. AI is not always perfect, but it is much better at capturing some dental conditions that dentists may not be able to identify as easily, such as cavities and other abnormalities.

## **Improved disease detection**

Dr. Kyle Stanley, co-founder of Pearl AI said their models show 37% more disease detection with AI technology. "Dentists are pretty good at reading radiographs, but they are not perfect or consistent. With both the dentist and the AI diagnosing together, the outcome was always better. The average dentist is about 70% accurate, meaning they would greatly benefit with help from AI."

By catching cases you may otherwise miss, AI is arguably an ethical way to perform more patient procedures and increase your revenue and EBITDA.

## **Create a higher standard of care**

Implementing diagnostic AI can increase the value of a practice overall by helping dentists impose a higher standard of clinical care. Are your associates underdiagnosing conditions, or over diagnosing? Are they catching enough cavities and doing enough fillings? AI can help you objectively evaluate your associates and increase an organization's ability to teach and train

them. It's a valuable tool for leaders to defend what they're saying and even develop a protocol for treatment plans moving forward.

Florian Hillen, CEO and co-founder of VideHealth said dentists are incredibly busy, and AI tools can help them focus on other tasks while having the AI assist in ensuring that treatment decisions are correct. "There are two measurable impacts, one is elevating patient care, and the other is identifying more treatable diseases with the AI than without the AI."

**An AI tool can give you an objective standard to show the insurer what AI caught, and as a result, the treatment was justified for reimbursement.**

## **Increase case acceptance**

AI technology not only makes it easier to diagnose patients, it also is helpful in increasing case acceptance. With diagnostic AI, patients who may be skeptical at first can better understand the progression of their issue because they are seeing it visually, thus they are more likely to accept treatment.

The dental practice also has the information they need to send to the insurance carriers for reimbursement of the treatment. Everybody knows the insurance carriers are chiseling away at what they're going to reimburse. An AI tool can give you an objective standard to show the insurer what AI caught, and as a result, the treatment was justified for reimbursement.

## **Proceed with caution**

Some of the current pricing on AI tools is geared toward getting dental group practices just to sign up with price increases coming later on. It's a race to the bottom, and not a sustainable model within the industry. There needs to be a consistent – and realistic – pricing system developed across the industry.

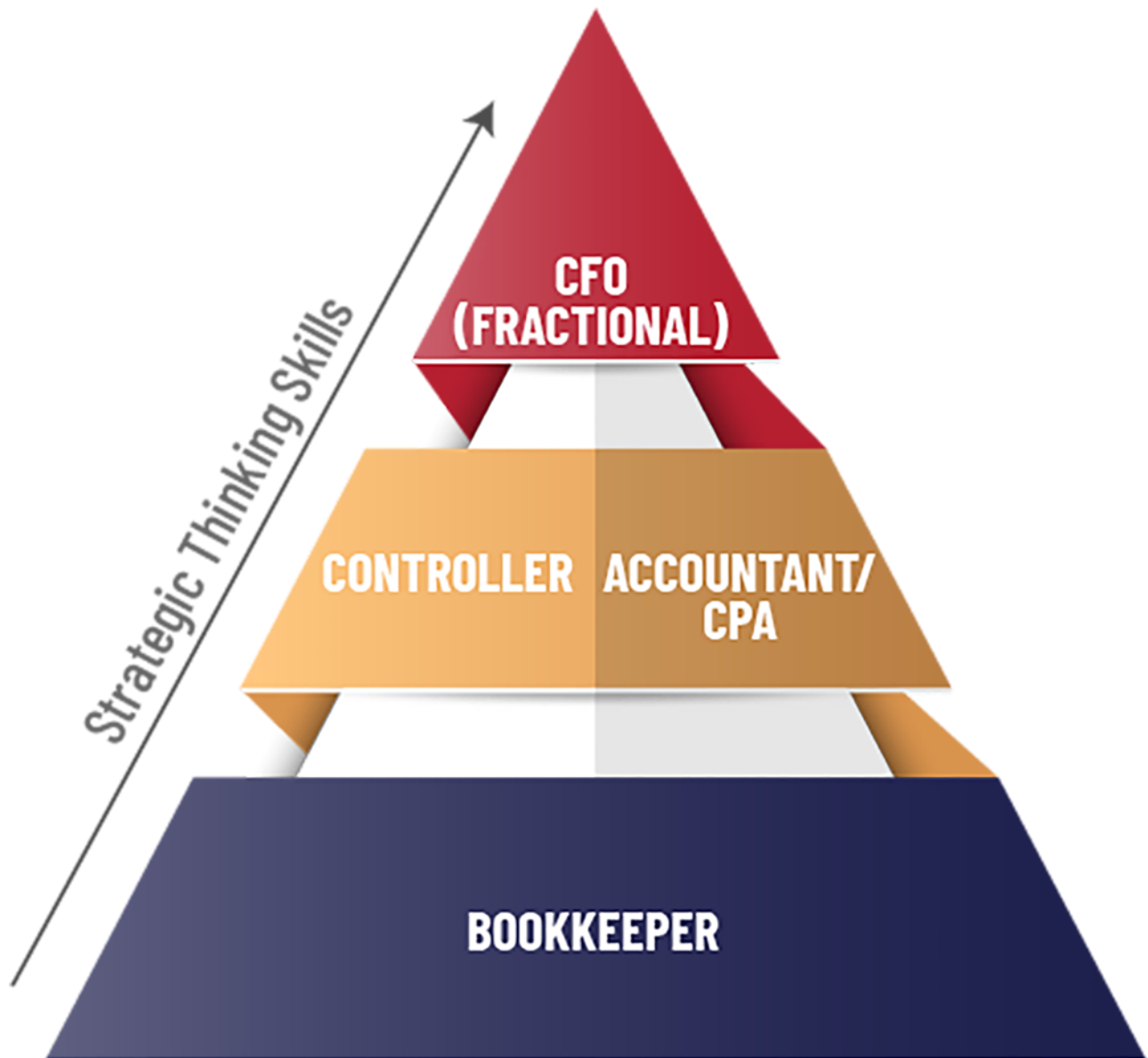
Not all products are the same. FDA clearances are important to consider.

Also, some feedback that dentists have given to DEO on the technology

is that some AI interfaces are not as easy and seamless to use, often causing extra stress for teams. The technology is in its infancy, and in its current state, can at times be cumbersome, cause issues, and slow care down.

There are specific programs and partnerships that allow a smoother transition with the implementation of AI technology in dental companies. If a dental company is interested in AI technology, they should reach out to reputable software companies that work within the dental space and have a track record of successful partnerships.

Before considering the implementation of AI in a dental practice, be sure to weigh the pros and cons, as it is a continually developing solution. ■



# Maximize Your Relationship with Your Finance Leader

Scaling up requires better communication with your operations team.

BY DANIEL BEAIRD

As dental organizations scale and grow, practice owners move away from the dentist's chair to learn marketing, accounting, operations, compliance, procurement skills and more. These can be daunting tasks for dentists and hiring a finance leader or team to run operations is critical to the mission.

“It’s a mindset and personal development journey,” said Emmet Scott, a partner at the Dental Entrepreneur Organization (DEO). “We see patients, or customers, as a revenue line item and employees as an expense line item. But, starting to see your employees as customers is part of that journey.”

The revenue line item of patient care doesn’t happen unless employees are being trained. “They’re actually your highest revenue-producing individuals. If you get rid of them, you’ll see your revenue decline,” Scott said.

For the operations side, some dental organizations want their finance leader to do it all.

“We say, I pay you a lot of money and you should be able to do all of this without systems, training and processes,” Scott said. “It’s our shortcut because we don’t want to develop people and accounting has given us an excuse for that.”

### **Asking your finance leader to do it all**

When an associate general dentist is brought onboard, a schedule is typically already built out for them. But when operations teams are tasked with their jobs, dental organizations can be naive to marketing, finance and accounting roles. Collections, profit-and-loss (P&L) sheets, raising funds, bank relations and taxes can all be assigned to a team or an individual under one umbrella.

“We often get frustrated when our team isn’t executing well,” Scott said. “We’ll say things like, ‘I thought you were the expert.’ But you can see why it’s not working if you think of all the things you’ve given them.”

It’s a lose-lose situation, because dental organizations need financial clarity, but they might be unaware of what they’re looking for. “If dentists thought about it from the clinical side, where they might need an orthodontist for specific procedures and an endodontist for other procedures, then it starts to make sense to them. They can organize that side accordingly. It’s the same on the financial side.”

Some best practices for working effectively with your finance team include:

- Meeting regularly
- Asking questions
- Setting clear expectations
- Having a shared vision
- Managing risk

### **Financial clarity**

According to an ADA study, two-thirds of U.S. dental practices report being the victim of fraud, theft or embezzlement. Building out internal controls to help stem this problem is its own specialty. Practice management software might allow for a lack of internal controls, making it easier for individuals to start pocketing money.

Many dental organizations have a bookkeeper and an accountant, while some also have a controller and a fractional or full-time CFO. These duties can be outsourced, handled in-house or both. As dental organizations grow to multiple locations, they need more financial clarity.

“Whether it’s three, five, 10, 20 or 50 locations, if you don’t have financial clarity, you’ll drive off a cliff,” Scott said.

Revenue covers up a lot of sins, but issues arise as soon as revenue declines and margins are squeezed.

“As entrepreneurs, we’re so focused on grit and vision that sometimes we forget the basic blocking and tackling of business that we have to get right,” Scott said. “If there’s no profit, then there’s no mission.”

### **Chart of Accounts**

A Chart of Accounts might be the most important aspect of bookkeeping. It’s the combination of all accounts used and listed in a financial report.

It lists all income, expense and equity accounts needed for business bookkeeping. All businesses use a Chart of Accounts in their accounting or bookkeeping to generate financial reports.

“A bookkeeper books the expense and revenue pieces, while a controller helps with internal controls and the Chart of Accounts,” Scott said. “Centralize this data and get the right people to help you figure out what you’re truly collecting.”

### **Types of finance leaders**

#### **Bookkeeper and Accountant**

As dental organizations grow, practice managers or even family members might fill the role of bookkeeper, keeping up with the day-to-day financials and working with the revenue cycle management team in accounting software.

An accountant can handle preparing financial statements such as cash flow statements, tax preparation, audits and related tasks, manage payroll, track accounts payable and receivable, and apply for loans.

“Most accountants want to retain your organization to do your tax return,” Scott said. “They’ll say they provide bookkeeping services, but



# 2/3s

Of U.S. Dental practices report being victim of  
fraud, theft, embezzlement.  
-ADA Study

you have to know if they've built out a finance solution or if they're stringing you along for your tax return."

As more locations are added, dental organizations need to think about extra financial staffing.

"We had 200 bank accounts at 77 locations. As you scale and start DSOs, LLCs and partnerships, it can get intense," Scott said.

### Controller

For growing, multi-location DSOs, a controller might be the most important level of accounting. A good controller understands bookkeeping and the CFO's role and keeps the DSO's financial reporting on time.

"If you want somebody to run the team as you divide accounts payable

from accounts receivable, the controller will run it," Scott explained. "The controller will look at your internal controls to ensure what needs to be in place is there for scaling up."

Think of this role as the lead assistant or the equivalent of a top-level hygienist on the clinical side, he says. As your business grows, scaling accounts receivable processes is crucial. Efficient business growth relies on improving cash flow, addressing communication issues, filling knowledge gaps and enhancing security.

"The controller should have a checklist of what needs to happen in order for financials to be timely and close out every month," Scott said. "Ask them for the closing checklist.

They should have checklists, schedules and a set of controls."

### Fractional or full-time CFO

Ensuring DSOs have market-ready financials for their partners, lenders and potential investors is critical to their success. Hiring a fractional or full-time CFO provides strategic financial expertise. This includes staff hirings, location expansions, access to capital, merger and acquisition services, and more.

"A CFO helps you answer questions like if I hire this individual, how will they perform, or if I buy this location, how will it perform," Scott said. "A CFO also helps to understand valuations. So, start using this language to save yourself some headaches." ■

# Bringing Awareness to the Dental Workforce Shortage and Children's Oral Health

BY ANDREW SMITH, CHIEF EXECUTIVE OFFICER, ADSO

**The dental workforce shortage** in the United States poses a significant barrier to providing high-quality dental care. That is why the Association of Dental Support Organizations (ADSO) has made it a priority to help recruit and prepare the next generation of dental practitioners, from dentists to dental hygienists to dental assistants. As we approach National Children's Dental Health Month this February, it is crucial to bring awareness to and address the profound impact of this shortage on our children's oral health.

According to the Health Resources and Services Administration (HRSA) at the U.S. Department of Health and Human Services, there are currently 7,395 dental Health Professional Shortage Areas (HPSAs) in the country. These are communities facing a low health practitioner-to-population ratio, creating a substantial obstacle to adequately meeting residents' dental needs.

Data from the *National Survey of Children's Health* conducted by the HRSA brings to light the alarming state of children's oral health. In 2022, an estimated 3.9 million children aged 1 to 17 have teeth classified as "fair or poor." Moreover, the number of children visiting dentists in the past 12 months declined from 2017 to 2021.

The Centers for Disease Control and Prevention reports tooth decay as the most common chronic disease

among children in the United States. Shockingly, 52% of children aged 6 to 8 have had cavities in at least one of their primary teeth. Adolescents aged 12 to 19 are faring even worse, with 57% reporting cavities in at least one of their permanent teeth. The impact is most pronounced among children from low-income families, who are twice as likely to have untreated cavities than their higher-income peers. This has a detrimental effect not only on children's overall health, but also their school performance.

The state of oral health and lack of practitioners in rural communities illustrate the effects of the workforce shortage on children. Over two-thirds of all dental HPSAs — 4,946 of the total 7,395 — are situated in rural areas. A 2023 report by the American Academy of Pediatric Dentistry (AAPD) shows rural children are more likely to have unmet dental needs, lower dental visitation rates, and face limited access to preventive care. The report also draws attention to data from the 2011 to 2018 National Survey of Children's Health, showing an average of only 59.6% of rural children visit their dentist for preventive care compared to 66.7% of their urban peers. These challenges are further exacerbated by the high number of rural dentists nearing retirement.

A 2023 study published in JAMA Health Forum validates a long-standing belief held by the ADSO: recruiting more dental care providers could lead to improved health outcomes and reduce the risks of dental problems among children living in HPSAs. This underscores the urgency of bridging the gap in the dental workforce.

Addressing the dental workforce shortage requires a multifaceted solution that involves partnerships between various stakeholders, including dental professionals, children's advocates, and policymakers. As we begin the New Year and approach National Children's Dental Health Month, the ADSO remains steadfast in our commitment to making a positive impact. Our initiatives — from launching a taskforce dedicated to tackling staffing challenges and initiating the DSO Difference — and advocacy for license portability laws are all geared toward ensuring every resident and their children have access to high-quality dental care.

As we reflect on our organization's achievements in 2023 and anticipate the opportunities the New Year brings, the ADSO looks forward to continuing this vital work with our partners, industry experts, and policymakers. ■

# Beyond the Microphone

Unlock the secrets to building a thriving dental organization with DEO's Growth Secrets Podcast.

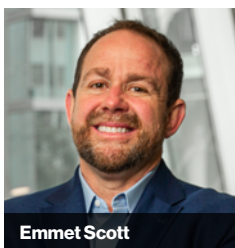


**Emmet Scott, DEO Partner and host, interviews a diverse line-up of dental industry leaders, revealing the secrets behind their success and extracting the tactics and tools they used along the way that can be incorporated by all listeners. In each episode, guests share their wisdom and insights in never-before-told stories that dig deeper into the challenges, failures, and triumphs that leaders face as they strive to build thriving organizations.**

## **EP 184: Student Loan Repayments:**

### **What it Means for You as a Dental Leaders**

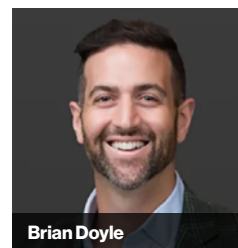
After more than three years, in June 2023, Congress ended the student loan payment pause, which suspended payments and interest for the duration of the pandemic. This fall, more than 28 million borrowers returned to repayment, an unprecedented challenge for both borrowers and the Department of Education. Listen to this episode to hear hosts, Emmet Scott and Jake Puhl, and the DEO Members discuss the potential impact this will have on the dental industry.



then executed. It's a simple, yet highly effective method to supercharge your business. By utilizing this system, you are bound to create clarity and focus for yourself, your team, and your business, by ensuring the projects being worked on are truly making an impact. If you've been feeling overwhelmed, this episode is for you!

## **EP 186: Revolutionizing Dentistry: Maximizing Profitability with Rectangle Health's Tech Solutions**

In this episode, Emmet Scott interviews Brian Doyle of Rectangle Health where they explore the crucial topic of profitability in dental practices. Together, they navigate the landscape of Rectangle Health's innovative solutions, including post-adjudication balance collection, virtual insurance card processing, and waitlist management with patient self-scheduling. Discover how these tools simplify payment processes, automate insurance tasks, and optimize scheduling, ultimately boosting revenue and enhancing the patient experience. Doyle emphasizes the pivotal role of technology in reducing costs and increasing efficiency, making this episode a must-listen for dental professionals looking to stay ahead in the industry.



*This podcast was sponsored by Rectangle Health* ■

## **EP 185: The Secret to Scaling:**

### **The Power of Organizing Your Ideas**

Want the keys to scaling your dental group business? Listen to this episode where host Emmet Scott breaks down one of the most overlooked secrets to growth: organization and prioritization. Unlike traditional growth strategies like capital, or team expansion, Scott introduces the a project management system (IDOPE) where all ideas are first documented, organized, prioritized, and

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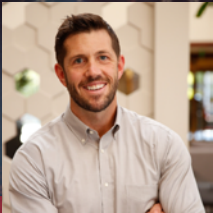
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