

MOUTHPIECE

smcnds.com

OCCLUSAL DISEASE

IN THIS ISSUE

- Why Dentists Don't Treat Occlusal Disease
 - How to Sell Your Dental Practice to a DSO or Private Practice
 - A Dentist's Handbook for Administrative Oversight
 - Are You Entering the Transition Zone:
Signs You're Ready to Sell Your Dental Practice
- and much more...



San Mateo County
DENTAL SOCIETY

Member Events Calendar

See Education / Events > Calendar of Events at www.smcds.com for details and registration.

New / revised course info in **bold text**. Featured courses **highlighted**.

M A Y						
DATE	DAY	TYPE	TOPIC	SPEAKER/CONTACT	LOCATION	TIME
3	F	HWS	Hands-On Workshop Topic: <i>All-Tissue Dental Lasers: Elevate Your Practice</i> <i>Sponsored by Convergent Dental & Patterson Dental</i>	Jeffrey Rohde, DDS, MS	SMCDS	9:00-1:00 P
7	Tu	G	SMCDS Leadership Meeting	President: Oanh T. Le, DDS	SMCDS	6:30-8 P
14	Tu	SCCE	Bay Area Aesthetic Masters	Ken Hovden, DDS / baaestheticmasters.com	SMCDS	6:30-8:30 P
16	Th	SCCE	Palo Alto Oral & Maxillofacial Surgery Study Club	Alexander Hoghooghi, DDS, MD / paomfs.com	SMCDS	6-9 P
16-18	Th-Sa	CE1/2	CDA Presents: Anaheim	Multiple	Convent Ctr	Multiple
20	M	RCE	BLS CPR Renewal Course	Richard A. Fagin, DDS	SMCDS	6-7:30 P
28	Tu	RCE	BLS CPR Renewal Course	Stephen R. John, DDS	SMCDS	6-7:30 P
J U N E						
4	Tu	SCCE	<i>Tentative</i> SMCDS Executive Board Meeting SMCDS Study Club	President: Oanh T. Le, DDS	N/A, Virtual	6:30-8 P
6	Th	SCCE	Topic: <i>Clear Aligners: The Ins and Outs of Virtual Treatment Planning</i> Sponsor <i>Align Technology</i>	Sara A. Andrews, DDS, MS	SMCDS	7:00-9:00 P
11	Tu	G	Bay Area Aesthetic Masters	Ken Hovden, DDS / baaestheticmasters.com	SMCDS	6:30-8:30 P
12	W	PS	How to Strategically Sell to a Partner, Associate, or a DSO	Ali Oromchian, JD, LL.M. & Gavin Shea	SMCDS	6:30-8:30 P
13	Th	SCCE	Palo Alto Oral & Maxillofacial Surgery Study Club	Alexander Hoghooghi, DDS, MD / paomfs.com	SMCDS	6-9 P
19	W	RCE	Mandatory Annual Workplace Violence Prevention & Active Shooter Training	Kriss Ghafourpour, DDS	Webinar	6:30-8:00 P
24	M	RCE	BLS CPR Renewal Course	Stephen R. John, DDS	SMCDS	6-7:30 P
26	W	NDS	New Dentists Pop-Up Network & Mingle @ Salt + Brine & The Generator Bar at The Alexandria <i>Event sponsored by C-Dental, TDIC, & Yaeger Dental</i>	Mike Aicardi 650.637.1121	San Carlos	7-9 P
29	Sa	FMB	Shredathon: Document Shredding, eWaste, & Lead Foil	Jim Aicardi 650.637.1121	Sequoia HD Redwood City	9-12 P
J U L Y						
9	Tu	G	<i>Tentative</i> SMCDS Executive Board Meeting	President: Oanh T. Le, DDS	N/A, Virtual	6:30-8 P
12	F	RCE	8-Hour Infection Control for Unlicensed DAs	Melodi Randolph, RDAEF2, CDA, OAP, BS, Med	Dntl Office San Carlos	TBD

EVENT TYPE	
AR	Allied Dental Relations
CE1	Core CE
CE2	20% CE
CO	Community Outreach
FMB	Free Member Benefit
G	Governance

EVENT TYPE	
H	Holiday
HWS	Hands-On Workshop
L	Leadership
NDS	New Dentists Social
PG	Personal Growth
PM	Practice Management

EVENT TYPE	
PM1/4	Pract Mgmt 1=New Dent 4=Life Active
PS	Professional Success
PS1/4	Prof Success 1=New Dent 4=Life Active
RCE	Required CE
S	Social Event
SCCE	Study Club CE





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Photo by [TOMOKO UJI](#) on [Unsplash](#)

President's Message

By Oanh Le, DDS



Dear Fellow SMCDS Members,

I hope this message finds you all in good health and spirits as we welcome the arrival of spring.

As we look ahead to the upcoming months, there are exciting developments on the horizon for our dental community. With the CDA scientific meeting transitioning to an annual event in May 2024 in Anaheim, CA, the SMCDS is preparing to host an in-person OSHA & Infection Control course on October 4, 2024 at the SMCDS office. This course aims to provide valuable education for our members, especially given the absence of this option at NorCal CDA Presents.

On April 18 we were delighted join forces with the Mid-Peninsula Dental Society (MPDS) for our General Membership Meeting at the Hiller Aviation Museum. The meeting featured an engaging discussion on Occlusion led by Dr. Gary DeWood.

Looking further ahead, mark your calendars for September 27 & 28, 2024, as SMCDS gears up to participate in the Bay Area Dental Expo at the Santa Clara Convention Center. This two-day event promises to showcase the latest innovations in dentistry, with 15 esteemed speakers covering a range of topics including Artificial Intelligence, Dental Trends, and Therapeutics. Registration is now open!

Additionally, we are proud to engage in the Oral Health Alternative Payment and Access Acceleration Learning Collaborative alongside HPSM and Sequoia Healthcare District. The goal is to provide access to care to underserved communities. Please contact Nakia at nakia@smcnds.com for more information.

As President, I encourage each of you to share your thoughts and ideas for our dental society. Whether it's suggestions for speakers or topics, or considerations for joining the Board, your input is invaluable in shaping the future of SMCDS. Together, let's continue to strengthen and enhance our dental community.

Thank you for your ongoing support and contributions to SMCDS.

Warm regards,

Oanh Le, DDS

Oanh.le.dds@gmail.com

415.519.9852

Retirements



Richard A. Fagin, DDS – San Mateo Oral and Maxillofacial Surgeon and SMCDs member of 48 years has retired and sold his practice to his son and SMCDs member dentist **Adam Fagin**.

Looking for space to host your next seminar, meeting, study club or clinical training?

Consider the **NEW SMCDs Seminar Room**

It's perfect for small or medium groups and provides an ideal teaching and learning environment, for less than you'd pay at a hotel or commercial conference site.

The SMCDs Seminar Room is available for rentals 8am to 10pm daily and offers...

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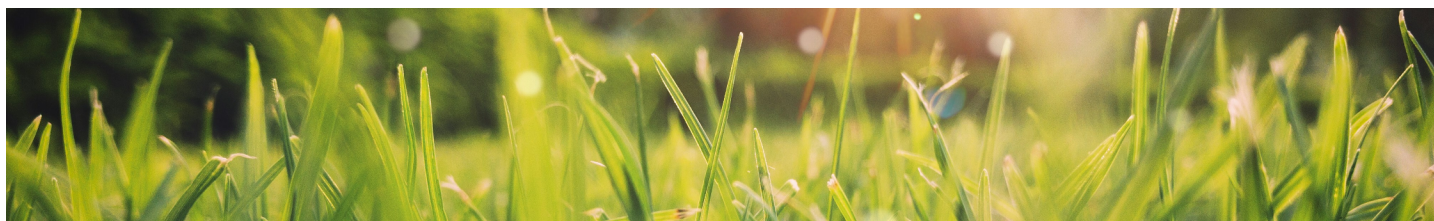


San Mateo County
DENTAL SOCIETY

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New Member Meet-Ups

SMCDS Leadership members schedule time to meet-up with our newest members to get to know them in-person. Stopping by to visit an office or going out to lunch is a great way to welcome new members into the SMCDS family and answer any questions. If you are a newer member and haven't had the chance to meet with a leadership member, e-mail nakia@smcdfs.com to set-up a meeting.



Zac Held and Jaime Lau
met **Dina Hammouda**
at her office in San Carlos.



Cathy Tao
met **Jiachen Lin** for lunch
at Yayoi in San Mateo.

New Member Celebration

Welcome!

Join us in celebrating **8** new members from
March 2024 to May 2024,
contributing to the voice that is SMCDS - **621** strong...

Tina Bastar, DDS
UCLA - 2019 - GP, 2021 - Pedo

Bahareh Fatemi, DMD
Case Western Reserve - 2022 - GP

Miguel A. Pissani, DDS
Universidad De La Salle - 2022 - GP

Nina Carpenter, DDS
UOP - 2016 - GP

Ellen Liang, DDS
Univ. of Toronto - 2020 - GP

Akhilesha Puvvala, DDS
NYU - 2023 - GP

Cheryl Chang, DDS
UOP - 2023 - GP

Jiachen Lin, DMD
Harvard - 2021 - GP



Why Dentists Don't Treat Occlusal Disease

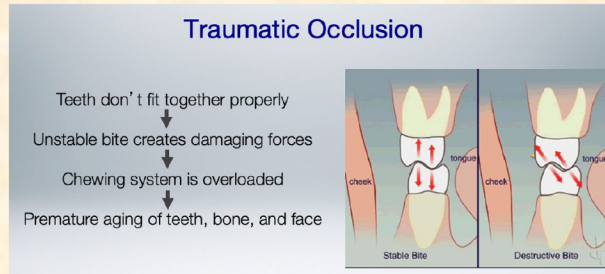
By Timothy Leary, DDS

"The three major diseases we treat are caries, periodontal disease, and occlusion. Occlusion remains the major untreated disease in dentistry today. We probably treat caries too much, perio too little, and we don't even think about occlusion." Dr. Gordon Christiansen, Dentistry Today, Feb 2000

"Occlusal disease is the main cause of tooth loss in today's society. It is more destructive than caries and periodontal disease." Dr. Peter Dawson, author of Functional Occlusion.

The Problem

Dentists diagnose and treat infectious disease because that's what we know. But we overlook the undiagnosed and untreated occlusal disease already present in our existing patients. And there is a LOT of untreated occlusal disease. Why don't we do more? I think there are two big reasons.



First, no one wants to pay for it. Patients don't want to pay for it. They have not been educated by dentists to have high value for a stable chewing system with proper force control. Further, dental insurance won't pay for it. How can we treat a problem that involves all the teeth when insurance benefits only cover fixing one or two teeth a year? Heck, insurance companies even decline payment for mounted study casts, and diagnostic splint therapy.

Second, diagnosis and treatment of occlusal disease is confusing and frustrating for dentists to learn. My opinion is dental schools and advanced restorative programs agree on nearly 80% of occlusal therapeutics. Yet, what they emphasize is the 20% they don't agree on—technique and instrumentation! For example, if you don't use their whiz-bang articulator then you don't deserve to be a dentist. Some teach only an upper splints work, while others say it has to be a lower splint and upper splints are garbage. Who should we believe? What instrument should we use?

The Solution

Well, there are solutions to both problems. Many patients are happy to pay out of pocket when they understand occlusal disease with premature tooth loss, pain, dysfunction, and premature oral-facial aging is preventable with proper diagnosis and conservative, non-invasive treatment. It's easier and less expensive in the long run to maintain a healthy mouth than one in a constant state of repair. It's a win/win for patients and for the dental team. Patients get healthier and gain freedom from endless dental repair, and the dental team gains greater professional and financial reward.

In addition, dentists can get clarity and simplicity on the management of occlusal disease. It's not rocket science, it's just a few principles. What is the 80% that occlusion gurus agree on? Drum roll please. It's force control! The components of force control are:

- Stable position of the jaw joints.
- Balanced tooth contacts when the condyles are seated.
- Front tooth guidance that separates the back teeth during jaw movements.
- Anatomic occlusal tooth form (i.e. cusps and grooves, not flat teeth.)
- Adequate airway.

"You can't diagnose the chewing system by just looking at the parts, the teeth." Dr. Jim Benson former President of OBI.

The Challenge

Dr. Pete Dawson says the two causes of tooth loss are harmful bacteria and mechanical stress from an unstable bite. Most patients coming to my office know the dangers of tooth decay and gum disease. However, few understand the risks of an unstable bite, and they ignore the early signs of breakdown from occlusal disease. After 30 years in dentistry, I've learned:

- People often have not been advised of various treatment options available.
- People are not aware how everything is inter-related—that teeth are part of a chewing system that includes nerves, ligaments, muscles, bones, and jaw joints.
- People underestimate the value of a healthy, comfortable smile and relaxed facial muscles.
- People think they are healthy if they don't have pain.

Lack of a stable chewing system causes progressive tooth wear, fracture/breakage, tooth mobility, gum recession and accelerated bone loss, headaches, TMD, and parafunctional habits leading to failed dentistry or premature tooth loss that is painful and disfiguring.

“Wear on teeth is common, but not normal. Wear on teeth is a sign of abnormal function.” Dr. Robert Lee, founder of Orognathic Bioesthetics, International (OBI.)

Most often dental disease occurs slowly at first. Then, at some critical point, breakdown accelerates where it requires a major commitment of time, money, and energy to avoid tooth loss, pain, dysfunction, or disfigurement. The situation becomes a “traumatic crisis” even though preceded by years, or decades of patchwork repair.

Forget the Lecture, Give Patients a Unique Experience

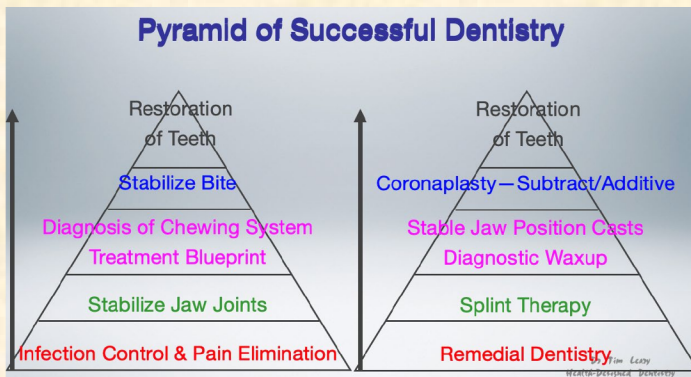
Dentists have used splint therapy for many years to keep the teeth apart during chewing, and to allow the lower jaw to return to a comfortable position without interference from the teeth. Many situations can lead to malfunction of the lower jaw, including accidents, surgery, developmental defects, oral habits, fillings placed over the years, naturally occurring poor bite, orthodontics, psychologic stress, clenching or tooth grinding, and other conditions.

*“Splint therapy is key to helping patients understand the benefits of a healthy chewing system. They need to experience what a stable occlusion FEELS like before they will pursue corrective treatment.”
Dr. Michael Schuster, founder of the Schuster Center and former cadre at the Pankey Institute.*

“The temporomandibular joint is the most complex joint in the human body; therefore, dentistry has chosen to ignore it.” Dr. Tom Basta, founder of the Foundation for Advanced Continuing Education (FACE).

Splint therapy can protect teeth and supporting bone from the damaging effects of clenching, grinding, and other habits. It can provide relief to muscles in the face and neck, and ensure the bite is stable prior to definitive restorative treatment.

I studied occlusion for years. I completed courses at two post-graduate schools of occlusion, FACE and OBI, and I’m familiar with Pankey-Dawson restorative methods. Both schools teach an accurate diagnosis of a patient’s mouth requires diagnostic casts mounted on an articulator in stable jaw position, what is often called centric relation. Further, centric relation that has been verified with splint therapy. There may be disagreement on which articulator is best, which splint, occlusal scheme or bite record is preferred, but one principle holds firm—no centric relation verified with splint therapy, no final diagnosis!



Go Slow to Go Fast

So how do we help patients want the treatment they need for force control? I've had success by slowing down the exam/consultation process into three phases. Give the patient time to build a relationship with the dental team, and to understand the importance of a masterplan for oral health (Hint: It's not a computer-generated fee estimate showing procedure codes and fees.) Help

them appreciate the importance of controlling the causes of oral disease--harmful bacteria and abnormal forces. Finally, help them understand the value of long-term solutions that save time and money over their life. It looks like:

- Phase 1: Control infectious disease, decay and gum disease, which cause tooth loss the fastest.
- Phase 2. Make a diagnosis of the chewing system and develop a blueprint (diagnostic waxup) of proposed treatment. Splint therapy is generally reversible, and allows the patient to experience, to feel the benefits of a stable occlusion. An intraoral preview, a mockup with flowable composite or provisional acrylic, allows the patient to instantly visualize final tooth form in their mouth.
- Phase 3: Definitive treatment which can be immediate, or phased with composite addition, to accommodate the patient's budget and lifestyle.

This **3 Phase** approach is a proven process for helping patients co-discover and co-diagnose occlusal disease. It takes them from unawareness to awareness to desire to control abnormal forces, and then to decision and action for definitive treatment.

Why not partner with your patients to prevent and control occlusal disease? Leading experts in dentistry say there is a huge unmet need. It's an excellent professional and business opportunity right under our nose! Helping patients control occlusal disease is the level of excellence and professional service many patients are searching for but can't find in insurance driven offices. Do you want to be a repair mechanic or an artist making a difference?

Dr. Leary had a fee for service dental practice in Menlo Park, CA. He lectures on comprehensive restorative dentistry, case presentation, practice development, and health-centered care. He completed advanced restorative training at FACE, OBI, Pac-Live, and the UCLA Esthetic Continuum. He completed the Schuster Center Management and Mastery programs and was a mentor. He served as President of Mid-Peninsula Dental Society, Chairman of the Peer Review Comm., and was a Conscious Sedation Examiner. Dr. Leary is co-founder of the Complete Dentistry Study Club with Dr. Brian Mills. He is the co-author with Dr. Michael Schuster of "A Better Way to Live: Creating a Practice for Prosperity, Fun, and Freedom."

Email: twlysh@gmail.com

How to Sell Your Dental Practice to a DSO or Private Practice

Selling a dental practice is a pivotal decision that impacts your professional and personal life. Whether you're considering a sale to a Dental Service Organization ([DSO](#)) or a private practice, understanding the intricacies of the process is crucial. As a dental practice owner, effective planning and strategic thinking are key to navigating this transition successfully. You must make sure you have the right [legal counsel](#) to guide the way, ensuring you make informed decisions that align with your long-term goals.

Understanding the Landscape: What Selling to a DSO Entails

Selling to a DSO is more than just a transaction. Instead, a strategic partnership integrates your practice into a larger [corporate structure](#). This process thoroughly evaluates your practice's operations, finances, and clinical environment. DSOs seek practices that integrate smoothly into their portfolio, enhancing their overall market presence and operational efficiency.

Partnering with a DSO means adapting to their operational frameworks and potentially adjusting to a new corporate culture. Sellers must prepare themselves and their staff for different operational methods and potentially new management styles. Effective preparation minimizes disruptions to patient care and helps maintain staff morale through the transition.

Evaluating the Benefits of Partnering with a DSO

- **Financial Security:** Partnering with a DSO typically results in an immediate and substantial financial gain. This lump sum can significantly enhance your financial freedom, allowing for a comfortable retirement or the opportunity to invest in new ventures.
- **Operational Support:** DSOs take over many administrative responsibilities, allowing dentists to focus more on patient care. This can lead to improved job satisfaction and reduce the burnout associated with managing a [practice's business](#) aspects.
- **Access to Advanced Technology:** DSOs often have the capital to invest in the latest dental technologies, which can improve the quality of care provided and increase patient satisfaction.
- **Professional Development:** Many DSOs offer ongoing education and professional development, helping you and your staff stay current with the latest dental techniques and technologies.
- **Economies of Scale:** DSOs can negotiate better terms with suppliers and insurance companies, potentially increasing the profitability and efficiency of your practice.

Preparing Your Practice for Sale: Key Steps

1. Financial Documentation: Ensure your financial records are comprehensive and up-to-date. Accurate financial documentation makes your practice more attractive to potential buyers.
2. Enhance Physical Appearance: Just like selling a home, your practice's physical appearance matters. Invest in making it look clean, modern, and well-maintained.
3. Streamline Operations: Demonstrating that your practice operates efficiently can make it more attractive to buyers. Consider refining operational procedures before putting your practice on the market.
4. Legal Review: Have a specialized [attorney review](#) your business to ensure all legal aspects are in order, from [employment contracts](#) to compliance with healthcare regulations.
5. Inform Your Team: Be transparent with your staff about your intentions to sell. Keeping your team informed helps manage expectations and reduces potential disruptions.
6. Market Effectively: Utilize appropriate channels to market your practice to potential buyers, whether through a broker or on your own.
7. Select an Advisor: Choose a consultant or broker who understands the [dental market](#) well and can offer valuable guidance throughout the sale process.

Navigating the Valuation Process: How to Determine Worth

- Understand EBITDA: Your practice's Earnings Before Interest, Taxes, Depreciation, and Amortization (EBITDA) is a critical metric that buyers will scrutinize.
- Market Comparables: Investigate sales of similar practices in your area to get an idea of your practice's worth.
- Growth Potential: A practice with a strong potential for growth may attract a higher valuation.
- Equipment and Technology: Modern, well-maintained clinical equipment can significantly enhance the appeal and value of your practice.
- Patient Base: A stable and recurring patient base is highly attractive to potential buyers and can drive up the value of your practice.

The Importance of Creating Competitive Bidding

Creating a competitive bidding environment is essential for maximizing the sale price of your practice. You can leverage better terms and possibly receive higher offers by engaging multiple potential buyers. This competition not only potentially increases the financial return but also gives you different perspectives and options for partnership.

Furthermore, this competitive environment allows you to better understand each prospective buyer's strengths and weaknesses. By comparing their approaches and offers, you can make a more informed decision that aligns with your professional values and goals for the practice's future.

Identifying the Right DSO: Fit and Future Prospects

Choosing the right DSO goes beyond financial considerations. It's about finding a partner whose vision for the future aligns with yours and who values the legacy you've built. Selecting a DSO that respects your practice's culture and has plans that complement your aspirations for growth and patient care is crucial.

Consider the [DSO's reputation](#), management style, and the level of autonomy it allows its practices. The right fit should feel comfortable and promising, with clear mutual benefits and shared goals. Understanding the DSO's long-term strategic plans and how they align with your vision for your practice's future is also important.

Negotiating Terms: What to Know Before Signing

Negotiating the sale terms is a critical stage in the process. Understanding every aspect of the agreement is important, from financial arrangements to your role post-sale. Ensure that the terms reflect your interests and provide for a secure transition.

Clarify your responsibilities and any obligations you'll have after the sale. Understand how the DSO handles transitions and what support you can expect in integrating your practice with their operations. It's also wise to negotiate terms that preserve the quality of care and maintain the practice's established patient relationships.

Transitioning Smoothly: Post-Sale Integration

A smooth transition is crucial for maintaining the quality of patient care and staff morale. Plan the integration process in detail, considering both clinical and administrative adjustments. Effective communication with both the DSO and your team throughout this phase is vital.

Expect some challenges as adjustments are made. However, with proper planning and open lines of communication, these can be managed effectively. Ensure that the DSO provides the support promised and that you're actively involved in the transition process to safeguard the interests of your patients and staff. Make sure you are available to answer questions and address concerns.

Legal Considerations and Protecting Your Interests

Navigating the legal aspects of the sale carefully is essential. A [specialized healthcare attorney](#) can provide invaluable assistance in reviewing contracts, ensuring compliance with healthcare regulations, and protecting your rights during and after the sale.

Be meticulous about handling patient records, transferring staff contracts, and defining your obligations in the sale agreement. These legal considerations are critical for protecting your professional reputation and personal interests.

Let The San Mateo County Dental Society Help You Make the Right Decision for Your Future Career

Selling your dental practice is a monumental decision with lasting implications. The San Mateo County Dental Society is here to support you, offering guidance and resources to help you navigate this complex process. Our expertise ensures that you make decisions that are informed, beneficial, and aligned with your long-term professional and personal goals.

Contact the San Mateo County Dental Society today to learn how we can assist you in selling your practice and planning the next phase of your career. Let us help you move forward with confidence and ensure that your legacy and patient care continue to thrive under new ownership.



We can help you avoid legal pitfalls, so you can focus on dentistry.

ALI OROMCHIAN, ESQ.



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A Dentist's Handbook for Administrative Oversight



By Michael Dinsio, MBA

As a dentist, your primary focus is on ensuring the oral health and well-being of your patients. But imagine if everything else in your practice, from scheduling appointments to managing finances, just ran smoothly and according to plan. The reduced stress levels and increased productivity would make your role as the “leader and chief” so much easier, allowing you to devote more time and energy to patient care.

Whether you’re a seasoned practitioner looking to refine your administrative processes or a newcomer seeking to establish a solid foundation for practice management, this handbook serves as your indispensable guide on the path toward achieving ease, comfort, fulfillment, and gratitude leading your team to success.

Let me start by breaking down the top 6 challenges dentists encounter when managing their teams. We will cover Communication, Time Management, Team Dynamics, Staffing Turnover, Workflow Efficiency, Billing and Insurance. These 6 factors all add up to a holistic approach to managing a team and keeping things running smoothly. However, managing people and teams is probably the most complex task that practice owners face. There aren't always straightforward solutions, from communication breakdowns to understanding the complexities of billing and insurance, patient relations, workflow, and team dynamics. But this guide will help you understand the path forward.

The Top 6 Challenges at Hand

1. Communication and Leadership

Communication breakdowns can happen in various ways. Busy schedules and fast-paced work environments do not allow for deliberate and instructive communication. As a result, lack of direction and unclear expectations can cause frustration and misunderstanding. Team members who do not have clear direction will become frustrated to receive answers and clarification as to how things should be done and what is expected. Errors and mistakes cause frustration all around. The team will beat each other up if the demands and expectations have not been officially defined or responsibilities aren't adhered to.

Decreased morale and feelings of ineffectiveness impact the joy and satisfaction of working with others and can start to overshadow the value you’re providing your patients. This is also one of the top reasons for discontent and desire to leave for another job. Tension between team members or supervisors can arise simply because there is just not enough time to connect while fulfilling the pressures of the day-to-day duties with tight schedules to adhere to.

One of the most important things you can do is to define job descriptions. Simple enough, right? Surprisingly, this exercise will eliminate most, if not all, confusion around who is responsible for what, where, when, and how. It allows team members to shine by becoming extremely good at specific things that need to be done day in and day out. Once job descriptions are officially defined and in detail, performance reviews, accountability, and kudos are transparent and easily managed. Also, practicing regular “check-ins” with your team members provides them an opportunity for open dialogue and feedback. It encourages participation so that they feel appreciated, heard, and a contributing member of the team.

Personality Management

Next Level Consultants coaches recommend the D.I.S.C. workshop to discover what makes people tick! We suggest you use this tool to help your team earnestly discover what drives them, what irritates them, and what allows them to decompress. This is a perfect self-assessment tool that we, as coaches, use to help people identify their personality characteristics.

By discovering what motivates you and how you interact with others in a social dynamic, you begin to have some self awareness and outside perspective. The D.I.S.C. assessment will help with team building. It can also help you as an individual discover what tasks and duties best fit your personality. So, for example, if there is a disconnect between your personality type and the kind of work you do, you may just be unfulfilled and anxious all the time, causing you to be miserable at work and not a team player.

Leadership

When leading the charge toward an end goal, you’re the first and the last. There is a tremendous amount of stress and responsibility that comes with that coveted position. Most of the time, no matter how successful you are, leadership doesn’t become any easier, and it’s something that you grow into more often than not. If you’re on a ship and the propellers are spinning, someone has to steer the ship. Develop a mindset of personal growth, personal awareness, and responsibility. It can take your career and practice to another level. Work with a coach or personal development consultant to help you get there. The journey is very much a personal one and requires an investment of time and energy.

2. Time Management

We started this little handbook by stating that communication breakdowns occur due to busy and demanding schedules. So, naturally, time management is the next challenge faced when managing team members. As a dentist, it is very conflicting to balance hands-on patient care with the managerial duties involved in administration. These roles have very different demands, leaving dentists stretched thin.

Reactive vs. Proactive

Clear protocols need to be developed in order to become proactive and not reactive. Everyone likes checklists, right? SOP - Standard Operating Procedures and policies in place are simply written guides for common duties and practices. Get everyone on your team on the same page. Debra Llama, a coach at Next Level Consultants, wrote a blog titled [“War of the Roses,”](#) where she discussed getting your team engaged and involved in writing these SOPs. After all, you work as a team in the day-to-day operations, so naturally, you should work together when creating and developing the best practices or standards for each and every procedure in your practice. This is a time-consuming process in itself. But the reward is that any new team member could walk into the office and know what is expected of them, how everyone works together, or what is expected of them. This way, every job gets done efficiently and without confusion, debate or frustration.

Delegating

You quickly realize that you don't know all there is to know when you first become a new practice owner. It can be hard to rely on others as a leader. Lacking clarity about certain job duties is an opportunity to seek out professionals who know this stuff really well. Find supportive people who can help educate you or build oversight systems or KPIs – key performance indicators. Get the clarity you need in order to effectively structure and delegate the things you don't have expertise on. A dental consultant should absolutely be able to provide you with systems and ways to support you as a dental practice owner. Next Level Consultants has these systems ready to implement, making leadership and practice management much more manageable.

3. Team Dynamics

The more team members you have, the more dynamics, right? We touched on this when we discussed the D.I.S.C. assessment. Everyone has unique personalities and communication styles. However, we didn't discuss how those personality types or styles work together in high-pressure work environments. Ever notice how two people just might not get along, butting heads all the time? Not that they aren't nice people and can't get along; they just don't see eye to eye. Well, this is usually because they have conflicting personalities. When working in a high-demand and busy work environment, personalities tend to become more amplified and self-evident.

Conflict Resolution

Addressing conflict promptly and constructively prevents escalation and encourages a healthier work environment. Implement conflict resolution strategies. Many times, misunderstandings occur simply because we do not take the time to evaluate or discuss individual perspectives. Simply allowing a space for discussion can help de-escalate tensions. There are trainings that can be implemented through coaching that offer training on conflict resolution. Focus on a shared solution, not the problem. Both parties should brainstorm solutions together in order to find a compromise and resolve misunderstandings. Document the resolution via a written form that can amend an SOP or simply just declare and commit a productive and rewarding path forward.

Collaboration

Emphasize the importance of team collaboration. Promote an environment conducive to cross-functional collaboration. Dental assistants, the front office team, and hygienists can leverage each other's skills and expertise to accommodate solutions. If someone is not comfortable or qualified, there is an opportunity for growth and mentorship. Share best practices as outlined in the SOPs and job descriptions. Provide development opportunities. Invest in ongoing training. Continuing education keeps team members up-to-date with the latest advancements and provides value to your practice as well as their individual or professional value. This fosters an environment that promotes success and a positive outlook toward the future. Encourage a growth mindset as well as a team mindset where everyone wins.

4. Team Members Turnover

Throughout this Guide, we've discussed ways to promote a healthier work environment. By taking on those challenges, you will naturally lower staffing turnover. Effective, healthy communication, conflict resolution, team dynamics, and promoting a positive growth mindset all foster a culture that demands excellence. A culture that is contagious.

The top reasons for team member turnover are lower pay, lack of benefits, poor management or leadership, negative work environment, lack of appreciation, limited growth opportunities, burnout or stress, inflexible schedules, or other personal issues. Let's discuss what you can do to hedge against and eliminate these common factors.

Policies and Procedures

Half the reasons above can be avoided simply by establishing clear job duties and SOPs. That's why they are so important. SOPs create protocols and a space for a healthier work environment and healthier communication. They also encourage a growth mindset. By clearly displaying to your team what they are working toward in order to be successful, you give them the green light to shine.

SOPs also encourage a team mindset. As we mentioned in the article titled "[War of Roses](#)", you can collaborate with your team to develop or refine the SOPs. Define what team collaboration looks like in your daily practice. By doing this, you set your team up for success, keeping them from getting burnt out, feeling inadequate in their position, or feeling unappreciated, which are common reasons for turnover. Strong leadership and systems will go a long way to keeping staff fulfilled and happy to be a part of your team. Also, allow time for regular feedback and open communication. Open lines of communication and feedback thwart any discontent and miscommunication that can cause a team member to want to leave.

Competitive Pay and Benefits

Offering competitive benefits can be achieved through financial investment institutions. Finding someone who you can work alongside as a business owner and who will provide support in this area is key to developing a successful plan that employees will appreciate and participate in.

Offering bonuses in a performance-based bonus system is always a great way to incentivize employees, fostering a growth and team mindset. Together – Everyone – Achieves – More! Of course, offering competitive pay can reduce turnover. However, when team members are happy and comfortable with the way things are, they will stay for less money. Creating a culture that provides personal fulfillment more than just monetary compensation goes a long way.

Onboarding and Training

Comprehensive onboarding policies for new team members are critical for setting them up for success. Have systems and schedules for hands-on training, software training, conflict resolution training, pathways for growth, mentors, and mentees, emphasizing the importance of their position, giving them a clear direction and goals to work towards. Boost new hire's confidence by welcoming them along with the entire team, providing them with a sense of belonging. HR for Health says to allow for 3 to 6 months to cultivate and integrate your new hire into the office. Check out this [blog article](#) to read best practices for onboarding new employees.

5. Workflow Efficiency

Streamline Processes

This is very much a clinical workshop on creating best-practice procedures and workflows with patients. The key to overcoming these challenges is to identify bottlenecks, redundancies, and inefficiencies. In other words, this means “Working on Your Practice, Not In Your Practice.” Next Level Consultants coach Paula Quinn, BSDH and practice owner, specializes in this arena. Evaluate and discuss to bring to light better workflow methods that can make everyone more productive. Sometimes, when you do things for so long, and after a while, you don’t realize there is a better, more efficient way. Use practice management software and automation to help alleviate tedious tasks that can be streamlined. Talk to a consultant to discover new approaches.

Continuous Improvement and Training

Again, fostering a collaborative approach and a culture of wanting to improve can encourage workflow refinement. Conducting regular performance reviews will help identify areas that need more attention. Provide opportunities to encourage training and ongoing professional development not just in clinical but also in administrative workflows. If you have strong systems in place, encourage mentorship, building everyone up together on multiple levels to achieve great results.

One way to promote a stronger team dynamic and efficient workflows is to offer shadowing opportunities. For example, give the administrative team the opportunity to observe dental procedures and interactions between the dentist and patient. Firsthand experiences can deepen their understanding and help them better assist patients with scheduling, billing inquiries, or treatment coordination. Cross-train team members to increase their knowledge and skill sets. This will assist when looking to make a more flexible schedule when someone is sick or needs time off.

Key Performance Indicators

Monitor and track. Establish baselines and growth measures. By tracking certain data points and important facets of your workflows, you can begin to gain clarity and direction and become more motivated to help your team achieve those bonuses and incentives.

6. Billing and Insurance

This is a huge challenge for dentists simply because they do not have time to get into the weeds of billing and insurance claims. As a result, dentists rely heavily on delegating these tasks to others to manage them. However, managing billing and insurance claims is one of a dental practice's most complex and time-consuming job duties. This job requires someone who pays attention to detail and has the patience to review documentation, follow up, and follow through.

When it comes to billing and insurance claims, the challenges that come with this job are administrative team members inadvertently entering incorrect patient information, insurance details, or billing codes into the practice management software.

Data Input

The challenge is managing a team and ensuring they enter data correctly into the computer. One way is implementing double-check procedures. Essentially, another individual audits the data entry to look for any red flags quickly on a regular or daily basis. This requires additional cross-training of other office employees. There are also software features that assist with this.

Implement standardized digital forms documenting accurate patient information. This means developing a strategy around systems that reach out to patients before procedures or visits and verify their coverage. Again, utilize software and digital assets to help you streamline tedious processes and increase efficiency.

Training and Support

Provide comprehensive training on coding. Utilize front office training coaches or online programs to help assist your front office team so that they become much more knowledgeable and comfortable with codes. Ensure your team has the tools they need to be knowledgeable and thorough. Consider incorporating regular coding audits to identify any lack of understanding or confusion around using the correct codes.

Lastly, systems for tracking and monitoring claim submissions should be developed. Set up reminders and automated alerts. The administrative team members should have a system or protocol that makes following up very easy and straightforward. This is probably the most time-consuming part of the job, but set aside time every day to ensure it gets done. Also, due to the fact that this process is so time-consuming, consider outsourcing these tasks to remote billing experts. Next Level Consultants has billing experts who can take on these duties for your office, ensuring your team members have more time to focus on other workflows that are critical to supporting patients and keeping schedules on time throughout the day.

Conclusion

This Handbook includes the Top 6 Challenges dentists face in managing administrative duties within their practice. Four more challenges are included, including HIPPA and Regulatory Compliance, Patient Relations and Communication, Technology Integration, and Financial Management. Email admin@nxlevelconsultants.com to get the complete handbook covering the rest of these topics.

Systems

Whether you're toeing the line between front office and back office, overseeing insurance and billing, financials, or clinical quality, you need systems. Systems keep you grounded. That's why working with a practice management consultant can save you invaluable time. Next Level Consultants can provide these systems and help you implement them in your practice. Developing these important documents assists you in the overwhelming role of managing other people. Just to make sure it's not missed. Working on your practice instead of working in your practice requires time and energy. However, the result will pay off with less stress and headaches later on.

Communication and Leadership

Communication is key, either written or verbal. Developing leadership skills is also a tall order if you've never experienced a leadership role before. Sometimes you have to grow into it. But having a coach or consultant helping you grow as a leader is an investment in yourself and sets you up in the long run. There are things you can do today that will impact tomorrow and years to come. Leadership and accountability are something that you can roll out slowly. Implement changes on a timetable to prevent employee anxiety and implementation conflicts.

Find Support and Delegate

Use this handbook as a starting point, and make sure you tackle these important topics one at a time. Don't bite off more than you can chew. We know you can do it all, but you're not a superhero, and if you are...I bet it's exhausting. So find good employees who will follow you. Develop strong communication

and leadership skills for yourself. Ultimately, you will not be able to find or retain good support from people who do not respect you and appreciate what you have to offer as their leader. You need good people to help you get where you want to be. Ever heard the expression “No man is an island”? Maybe a more modern day version of this expression should be, “You need to be a rockstar leader in order to get rockstar employees that will achieve rockstar results.” Be humble and honest with yourself. Look inward and evaluate what might be missing in order to come to terms with making those changes. Develop that growth mindset we talked about earlier in this article. I highly recommend doing a D.I.S.C. assessment. You can find a really easy to use and thorough D.I.S.C. assessment at www.understand.me

I will wrap it up with this one last thought to chew on...

Get the help you need in order to get the results you desire!

As a business owner and dentist, asking for help means you’re ready to invest in your business. Reach out to explore what working with a coach or consultant looks like. We can discuss your unique challenges in a 30 or 40 minute conversation. Email admin@nxlevelconsultants.com to set up a time to talk. Or visit www.nxlevelconsultants.com for more info.

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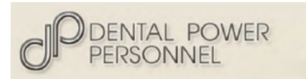
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Contact Nakia Brandt at nakia@smcnds.com or dental@hpsm.org



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Are you Entering the Transition Zone: Signs You're Ready to Sell Your Dental Practice

By Michael Njo, DDS

Remember "The Twilight Zone" TV show with Rod Serling? If you're humming the theme tune, this article is just right for you!

In dentistry, the Transition Zone is when a dentist reaches a point where they still love their profession but want to slow down and ease off the intense workload. It's when the daily grind of management starts feeling overwhelming, and you find yourself longing for a change. Maybe you've experienced those days when everything seems to go wrong, and you think, "I don't need this." That's the signal—it's time for a transition plan.

Have you found yourself dealing with team conflicts, staffing issues, or feeling physically and mentally drained? If so, it's definitely time to consider a transition plan. You planned for dental school, buying a practice, and running it efficiently, but did you ever plan for this transition phase? Many of us didn't, perhaps because we're hesitant to accept that this significant chapter of our lives is coming to a close.

I've encountered dentists in their late 70s and early 80s still debating whether it's time to let go. It's tough for them to acknowledge that it's time to move on, even when it's clear they should. But it doesn't have to be an abrupt farewell. A gradual transition that fits your timeline is often the best approach.

So, what's the process? It starts with consulting a transition specialist who can truly understand your desires and goals. They'll present different options and strategies, guiding you through the ramifications of each based on your needs. Understanding how you run your practice and what you want for its future is crucial for a successful transition - for you, the buyer, your team, and the community.

You don't have to sell your practice outright; transitioning out can be smooth and graceful. Yes, there are horror stories about buyers ruining practices or stealing patients, but with proper planning, these risks can be minimized or even unlikely. Just like entering dental school required planning and preparation, transitioning out demands careful consideration and implementation.

You can indeed have your cake and eat it too. Transitioning your practice slowly allows you to maintain a balance: selling the practice while still practicing on a schedule that suits you, free from management burdens, and with a cash infusion for retirement. You'll witness firsthand the legacy you've built, all while ensuring a seamless transition for everyone involved.

But first, you need to figure out what you want. A transition specialist will help you navigate this process, considering your needs, family situation, and practice dynamics. The more you share, the better they can tailor the transition plan to your requirements.

Next, it's essential to get a proper "Opinion of Value" prepared, akin to comprehensive patient records for treatment planning. This lays the groundwork for a successful transition. A good transition specialist will also provide implementation strategies to ensure positive outcomes for all parties.

Once you have decided to sell your practice, let us discuss how to position your practice for an optimal sale. You know what they say, location, location, location. Of course, you already have a location, it may be too late to change this. Here are some basic metrics buyers will evaluate and sellers should achieve for in an ideal practice: Hygiene 23% or above of gross annual production, 1 new patient for everyday dentist works, number of days the dentist worked in the year, team census - a great team will facilitate a great sale, financial and practice management reports are in order and organized is a hallmark of a successfully run practice and is the basis for many decisions. Profit and Loss Statement will be reviewed. It's important to have good source documents such as a General Ledger and a Profit and Loss Statement. Tax returns are final products and will ultimately be scrutinized.

Good books are the basis for good decisions, here are some metrics for financial analysis:

- Personnel Costs 25-30% of Income (Not to exceed 32%)
- Facility Costs 10% of Income (Not to Exceed 12%)
- Clinical Costs 12-14% of Income (Not to Exceed 15%)
- Other Business Costs 10% of Income
- Discretionary Costs 2% of Income
- Business Loan Payments (Principal and Interest). (Not to exceed 12% of total collection).
- Owner's Compensation, Other Doctors & Profit 30-45% of Income
(Not to be lower than what you are able to get as an Associate)

Management Reports - Qualitative Analysis:

- A production and collections report and a breakdown by each dentist and hygienist
- All production reports broken down by ADA codes.
- List of all adjustments, refunds and write offs
- Number of new patients each month.
- Active patients – last 6, 12, 18, 24 months
- Unscheduled treatment
- Accounts Receivable
- Credit Balances

Please note these are general KPIs and with all practice analysis a closer look is always warranted.

Ideally, start the transition process around five years before you plan to exit. Don't procrastinate - engage in these discussions early to secure your future and legacy. Remember, knowledge is power. Take charge of your transition and do it your way. Please email me at dentalstrategies@gmail.com for any questions. I would be happy to schedule a call.

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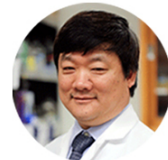
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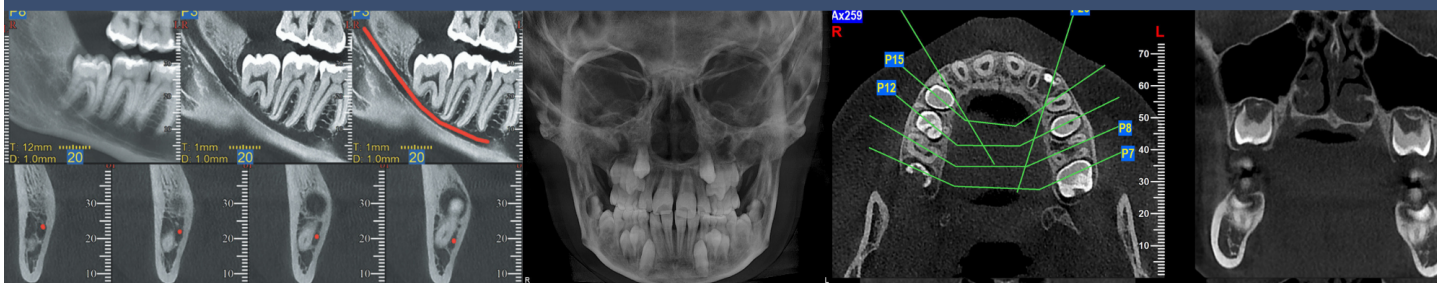
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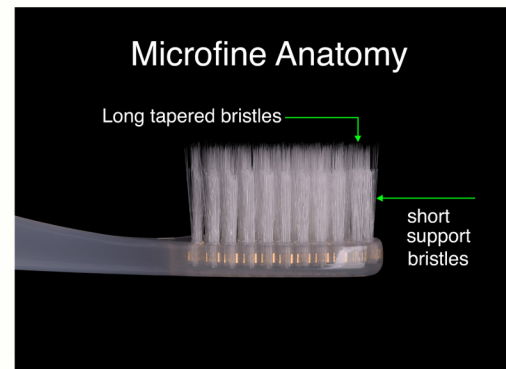
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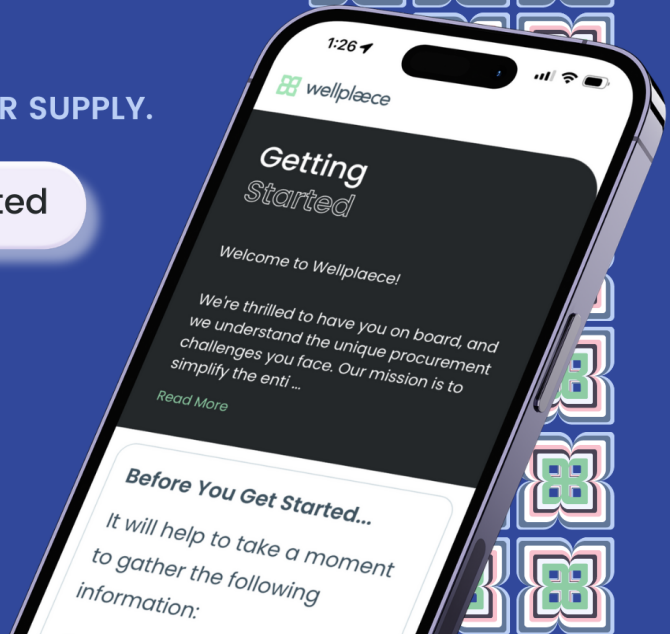
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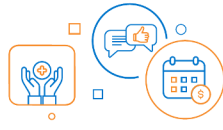
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Th 6/6

SMCDS Study Club

Clear Aligners: The Ins and Outs of Virtual Treatment Planning

6:30-8:30pm

SMCDS
Seminar Room
939 Laurel Ste C
San Carlos

Dinner
Provided

2 CE (Core)

Free for new
dentist
members!



Sara A. Andrews, DDS, MS

Description

The objective of this presentation is to help dental providers improve orthodontic treatment efficacy and efficiency with clear aligners. We will review case selection, and virtual treatment planning for various orthodontic case types. Special emphasis will be placed on biomechanics, and how to design the virtual treatment plan to effectively achieve the desired treatment goals, while minimizing undesired side effects.

We 6/12

Professional Success

How to Strategically Sell to a Partner, Associate, or a DSO

6:30-8:30pm

SMCDS
Seminar Room
939 Laurel Ste C
San Carlos

Dinner
Included



Ali Oromchian J.D. L.L.M.
and Gavin Shea

Course Objectives

Upon completion of this session, attendees should be able to:

- Determine the value of a practice.
- Evaluate the right kind of buyer.
- Learn how to implement tax-saving strategies.
- Reduce potential liability from employees and patients after you sell.
- Take actionable steps to increase the value of your practice before selling.
- Gain a comprehensive understanding of DSOs, including their structures, benefits, and challenges.
- Evaluate and assess different DSO opportunities.

We 6/26

FREE Member Benefit

New Dentists Pop-up Mingle & Networking @ Salt + Brine & The Generator Bar @ The Alexandria

7-9pm

sponsored
by



SMCDS New Dentists* this night is for you! Come on out to Salt + Brine & The Generator Bar @ The Alexandria in San Carlos for networking, food, and drinks, plus bocce ball, life-size chess, a classic retro cocktail arcade machine, and karaoke. Don't forget to bring a guest! **Experienced dentists welcome too!**

* New Dentists = graduated from dental school within the last ten years

Thanks to our wonderful and generous sponsors for making this event possible!



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RSVP ASAP! Space is limited to 30 spots!

Th 8/22

Hands-On Workshop

Evolution of Composites: Improve Your Workflow, Satisfaction and Profit

6-8:30pm

SMCDS
Seminar Room
939 Laurel Ste C
San Carlos

Materials &
Dinner
Included

2.5 CE (Core)



Patrick L. Roetzer, DDS, FACD, FICD

Workshop Highlights

- Want to learn why injecting composites bests cold or warm packing?
- Do I need a heater to inject composite?
- Can a flowable be a robust top coat that will withstand occlusal loads?
- Are the claims of unlimited depth of cure with dual cure bulk fill flowables valid?
- How can you avoid bubbles in injectables?
- If I can't "soft sculpt" these dual cures during the auto phase, how do I get anatomy in them?
- When is it best to light cure? What does light curing accomplish?
- Does composite function better under tension or compression?
- Do dual cured composite eliminate the pulpal floor pull away?
- Are there good unbiased citations to support the claims of dual cure flowable bulk fills?
- Can injectable bulk fills increase your production and profit?
- Experience a new universal single shade, packable composite - take a compule home

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