



4 PRINCIPLES FOR SUCCESS:

**How Emerging Groups and DSOs
Can Ensure a Successful Migration to
a Cloud-Based Dental Practice
Management Solution**



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Introduction

As the dental industry evolves, there is a growing need for dental service organizations (DSOs) to modernize their operations and implement new technologies. **Yet, three factors often hinder or delay digitization in dentistry.** Dr. Gary Orentlicher, DMD, Section Chief of the Division of Oral and Maxillofacial Surgery at White Plains Hospital, observed that it **“may simply boil down to time, money, and fear.”**

The cost of implementing new tools can be a significant barrier to entry for dental service organizations (DSOs) and emerging groups. And with any new tool, there is always the potential for disruption to the practice and ramp-up period for teams to become proficient at utilizing the latest technology. Implementing new systems can be an expensive and challenging undertaking without the right foresight and preparation. Unsurprisingly, DSO and group leaders can be hesitant to try cloud-based solutions such as practice management solutions.

The dental industry lags in cloud adoption compared to other fields. While cloud usage has reached approximately 90% in virtually all other industries, including healthcare at large, the dental sector significantly trails behind when it comes to embracing cloud technology.

Notably, 92% of dental practices say they intend to move to the cloud, yet around 85% are still on server-based systems.

The benefits of cloud adoption are clear. DSO and groups that have implemented cloud-based systems enjoy easier access to patient records, consistent reporting across locations, and simplified IT systems. Patient data is securely backed up and protected from fires, floods, or other natural disasters. In addition, cloud solutions frequently provide additional layers of protection against cybersecurity attacks. As a result, many DSOs and groups that have adopted cloud-based solutions are able to scale and expand their operations easier than organizations that continue to use inconsistent systems across locations.

This guide compiles the best practices of DSO and emerging groups leaders who have moved to the cloud successfully.

4 Pillars for a Successful Transition to the Cloud

In this guide, we describe four key pillars to build a firm framework for a successful transition, including:

Internal research and due diligence

Consult with internal stakeholders and build a list of non-negotiable functions that you need a practice management solution to provide for your DSO. Draft a list of questions and schedule product demos.

1

External research and evaluation

Ask trusted industry peers about their experience, particularly for the implementation, training, and conversion process. Ask vendors for references from DSOs that are similar in size and stage as yours. Read online reviews.

2

Staff empowerment and adoption

Learn how to empower staff to gain cooperation and support during implementation and conversion. Also, consider how to structure a training plan to ensure staff maximizes the DSO's investment.

3

Vendor resources

Learn how practice leaders can maximize their chances of success by leveraging vendor resources to work with internal stakeholders and meet deadlines throughout the process.

4

Now, let's dive into these four pillars.

1.

Internal Research and Due Diligence

Implementing a cloud-based solution is no small feat that requires careful planning and preparation. Through research, due diligence, and evaluating vendors and options, DSOs can ensure they select the right solution and minimize potential disruption to the practices.

CREATING A LIST OF NON-NEGOTIABLES

Before embarking on the journey, practices must first identify the needs of the organization. Here is arguably the most important step: DSO leaders should create a shortlist of the organization's non-negotiables.

Take time to meet with internal leaders to find out what non-negotiable functions your organization needs to be successful. Determine the top four to five critical capabilities and features the organization requires. Consider patient management, appointment scheduling, billing and payment processing, and records management. Ensure that you have buy-in about these critical functions from key stakeholders.

Even though you may not find a perfect product, this exercise creates an opportunity to weigh what matters and will keep you on track. You're less likely to get distracted by features that are not as valuable for your organization.



If you don't understand your numbers, your production, your collection, the amount of time that each appointment requires, what the production is with all the different insurance companies, then **you likely have suboptimal insurance fee schedules.**

DR. KEVIN COUGHLIN | Ascent Dental Care

EXPLORING THE OPTIONS

Practices should take time to research and evaluate vendors to ensure they select a solution that meets their needs. When talking with product representatives, consider factors such as vendor reputation and experience, cost, and support. Look for vendors with experienced teams and a proven track record of successful implementations. Specifically, ask to hear about their implementation, conversion, and training teams that support the onboarding process.

When shopping around, it is wise to schedule product demos to get a walkthrough of each solution and also inquire about current capabilities, future roadmap plans, and pricing structures.



2.

External Research and Evaluation

Another way to vet different software solutions is by seeking the advice of trusted colleagues. You can do this in a number of different ways through peer-to-peer conversations, online reviews, and you can even ask vendors to provide references.

ADVICE FROM INDUSTRY PEERS

The reason industry peers provide invaluable insights as you evaluate solutions is because you can ask other organizations that are similar to yours about their experience with the software. They can likely offer insight about what your experience will be during the implementation process and going forward as a customer.



QUESTIONS TO ASK

When seeking advice from industry peers to evaluate a prospective program or product, DSO and group leaders should prepare a list of questions. They can help ensure that the solution is right for the practice and that the conversion runs smoothly.

How long have you used the product?

Asking this question gives context for the level of experience a person has with the solution. Experienced users can offer more valuable insights into a product's capabilities and limitations.

What do you find most valuable about the product?

By understanding the most valuable features, practices can assess whether a product aligns with their requirements and gain insights into how it can be effectively utilized.

What challenges have you experienced with the product?

This question may warn practices about potential problems they may encounter during implementation. It also gives valuable insight into how vendors address customer problems and provide support.

How has the product changed your practice?

This question can shed light on the true value of a product or tool, including enhanced patient care, productivity, and revenue.

What recommendations would you give to a dental practice considering this product?

The answer to this question may provide valuable insight into approaching your transition. You may also receive recommendations for best practices and potential hazards to avoid.



We knew Denticon [by Planet DDS] was proven.

There were other groups my size that I knew and respected that were using Denticon. We also liked that Apteryx was open architecture and compatible with different systems.

DR. JAMES WILLIS | Willis & Associates Family Dentistry

3.

Staff Empowerment and Adoption

Transition success is heavily dependent on staff buy-in and involvement.

STAFF COOPERATION AND SUPPORT

To ensure a smooth transition, dental practices need staff cooperation and support. That is why organizations should involve employees throughout the various stages of implementation.

For instance, leadership can empower key staff members in product evaluation and selection. They may offer valuable insights into the capabilities and features that are most important to them, as well as how systems will impact everyday operations. Moreover, involving employees in the process increases their sense of ownership and investment in the implementation's success.

A practical example of empowering staff would be organizing two demos for a prospective software solution — one with senior organizational leaders and then a follow-up with a meeting with employees who regularly use the system to give their feedback.



STAFF TRAINING

Dental practices must provide comprehensive training to end users. Before and after implementation, employees should receive guidance and support to ensure that they are equipped to use the investment to its full potential.

To alleviate stress and ensure a seamless rollout, offering dedicated on-site personnel during implementation can be highly beneficial. However, in cases where in-person training and assistance are not possible, it becomes crucial to provide virtual training, printed user guides, and establish peer-to-peer support as essential resources. Provide ongoing training as new issues arise, or employees have questions as they become familiar with the new system, even after Go-live.



If I were advising another DSO, **training and education is the single biggest mitigation point.** [G]o in and train teams properly from the start and have skilled people ready to support staff on day one.

CHRIS GRIMM | Chief Technology Officer of Family Dental Health

4.

Taking Advantage of Vendor Resources

During the transition, practices can maximize success with these tips for working with stakeholders, setting timelines, and leveraging implementation coordinators as a resource.

WORKING WITH KEY STAKEHOLDERS

To ensure a successful transition, key stakeholders must stay engaged and informed. Dental practitioners, IT teams, office managers, and certain key staff members must receive clear and frequent communication. Establish a regular cadence of communication and select appropriate methods of communication. In this case, it is better to over-communicate than share too little information.



ESTABLISHING TIMELINES

Establishing and adhering to deadlines is also crucial to implementation success. Team leaders should lay out a timeline and stick to it as much as possible for an easy transition.

Rushing conversion might lead to errors and inefficiencies, ultimately resulting in a negative experience for employees and patients. Each location should collaborate with their vendors to set realistic deadlines and ensure that all interested parties are aware of schedules and any potential delays.

PARTNERING WITH VENDOR IMPLEMENTATION COORDINATORS

Throughout the deployment phase, DSOs and emerging groups should take advantage of the product vendor's resources and support. Organizations usually assign implementation coordinators to guide practices through conversion, train people, and provide continuing support.

The implementation coordinator is critical to the project's success. They are driven to assist practices in staying on track, meeting deadlines, and communicating any issues or concerns to stakeholders. Allow them to take some pressure off your team by organizing activities, facilitating meetings, and assisting with integrations.

To get the most out of the conversion and implementation processes, dental offices should establish open lines of communication with their implementation coordinator and leverage their knowledge.



To me, the biggest thing is the support piece and then the second biggest thing is not all practice management systems are created equal. Those become a breeze when you **pick the right partner.**

CHRIS SCOTT | Chief Information Officer/Chief Information
Security Officer of Dental Care Alliance

Summary

For many emerging groups and DSOs, the benefits of the cloud remain unrealized. But more organizations are adopting this technology each year to position themselves for growth and scaling in a fast-evolving industry. Emerging group and DSO leaders that navigate a smooth onboarding phase can more quickly move into the growth phase as an organization that standardizes and centralizes in the cloud.

As you begin your research, contact us to begin exploring your options to move to the cloud.

BOOK A DEMO

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Planet DDS is the leading provider of cloud-enabled dental software solutions serving over 10,000 practices in North America with over 60,000 users. The company delivers a complete platform of solutions for dental practices, including Denticon Practice Management, Cloud 9 Practice Management, Apteryx XVWeb Cloud Imaging, and Legwork Practice Acquisition. Planet DDS is committed to creating value for its dental practice clients by solving the most urgent challenges facing today's dental practices in North America.