



DSO and Dental Group Growth Guide

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The Strategic Growth Guide for DSOs and Dental Groups

Forward-thinking dental support organizations (DSOs) and dental groups increasingly recognize that the current challenges facing the dental industry—staffing shortages, shifting patient expectations, and outdated legacy systems—also present an opportune moment to grow and expand market share. **Technological innovations pose incredible ways to enhance operational efficiency and patient experience while growing the organizational footprint and increasing cashflow and profitability.**

This guide outlines key pillars of sustainable, strategic expansion for DSOs and dental groups. It also addresses modernizing systems through cloud-based dental software technology, optimizing revenue cycle management (RCM), and applying data-driven insights to support decisions. **Having a clear strategic plan can guide your growth efforts**—ones rooted in measurable goals that are aligned with your long-term business objectives.

Strategic Planning for Organizational Growth

DSO and dental group growth objectives often focus on improving profitability and expanding market presence. Establishing the right key performance indicators (KPIs) enables leadership to track progress and make informed decisions. These three tenets ensure your operational strategy aligns with your broader organizational goals:



1

Define your growth goals and KPIs.

Strategic growth begins with clear goals and measurable outcomes. Start by identifying specific growth objectives, then determine the KPIs that will track progress in each area. Beyond revenue collected, important indicators may include appointments booked, reduced no-shows and last-minute cancellations, and other operational metrics tied to patient flow and efficiency.



2

Build an operating model that supports scale.

Identify what you require to accurately support those goals and what you need to measure them. Clearly defined requirements provide an understanding of what your non-negotiables are and applying technology that will best support your objectives.



3

Align operational priorities with long-term strategy.

Find out the most important and effective elements within your desired operating model and match them to where they fit on your path to strategic growth. This is where you'll examine whether your current tech stack aligns with growth goals or if optimizations are required.

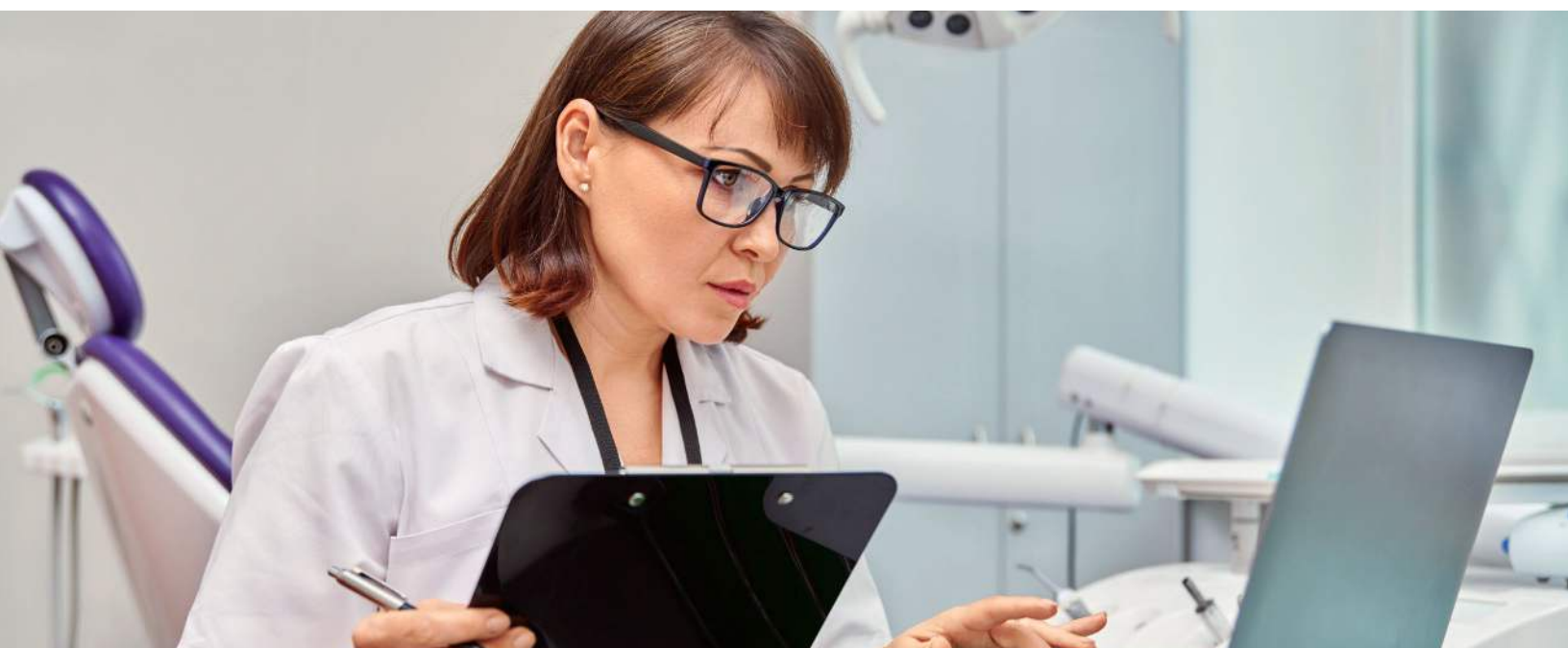
Technology Requirements for Growing Operations

DSOs and dental groups have long operated on outdated, fragmented, cumbersome technologies that do not provide adequate security of patient data. Organizations with the most growth potential embrace cloud-based technology to improve operations and patient management, attract and retain patients, and better support doctors and office staff. Here are three ways to optimize your business:

1. Modernize operations with cloud-based solutions.

Server-based systems and outdated legacy platforms are not user-friendly, lack centralized access across multiple offices, and limit remote accessibility. They also require costly IT support, and data can be lost or become inaccessible if servers are damaged or go down.

Cloud-based solutions are more efficient, cost-effective, and offer enhanced security. They enable collaboration and information sharing for multiple office locations. Applications and data can be securely accessed anytime and from anywhere. Additionally, the infrastructure of cloud-based solutions allows DSOs and dental groups to scale resources up or down as needed, eliminating the need for large upfront investments in hardware or ongoing IT support.



2. Ensure interoperability with open APIs.

It's important to ensure your tech stack works well together and that systems "talk" to each other. Disparate or siloed systems for scheduling, billing, and patient records forces administrative teams to input this information manually. This results in wasted time, inconsistent workflows, and diminished quality of patient care.

Open APIs allow you to integrate operating systems so platforms can communicate with each other. It also ensures your technology offers flexible interoperability, working the way you want and need to work—**not the other way around**. They provide customization and the flexibility required to adopt and integrate solutions tailored to specific needs.

The Planet DDS API program and platform empowers DSOs and dental groups by facilitating integration, synchronized data sharing, and transformative operational efficiencies across multiple applications.

"With the Planet DDS API program, we are not only addressing the challenges of fragmented systems but also enabling our customers and partners to build and deliver powerful, customized solutions for their teams, customers, and patients to increase efficiency and experience," said Eric Giesecke, CEO of Planet DDS. "It enables DSOs to collaborate with partners and customize their technology to meet unique needs, ensuring they can future proof their operations effectively."



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ERIC GIESECKE
CEO
Planet DDS

3. Automate workflows to support scalability.

Integrated workflow automation in dental practice management software increases profitability by saving time and supporting sustainable growth without additional staffing. It also improves patient experience, reduces human error, and systemizes tasks for consistency. This includes automating appointment emails/texts, reminder emails/texts, payment information, billing, insurance reconciliation, and access to patient health information.

63%+
identified staffing
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major issue.

[2024 ADA Survey](#)

With an outdated system, maintaining a workforce has become a top concern for dental groups, with more than 63% of respondents in a [2024 ADA Survey](#) identifying staffing shortages as a major issue. Many organizations are raising wages to attract and retain staff, making cost-effective measures essential to protect profitability.

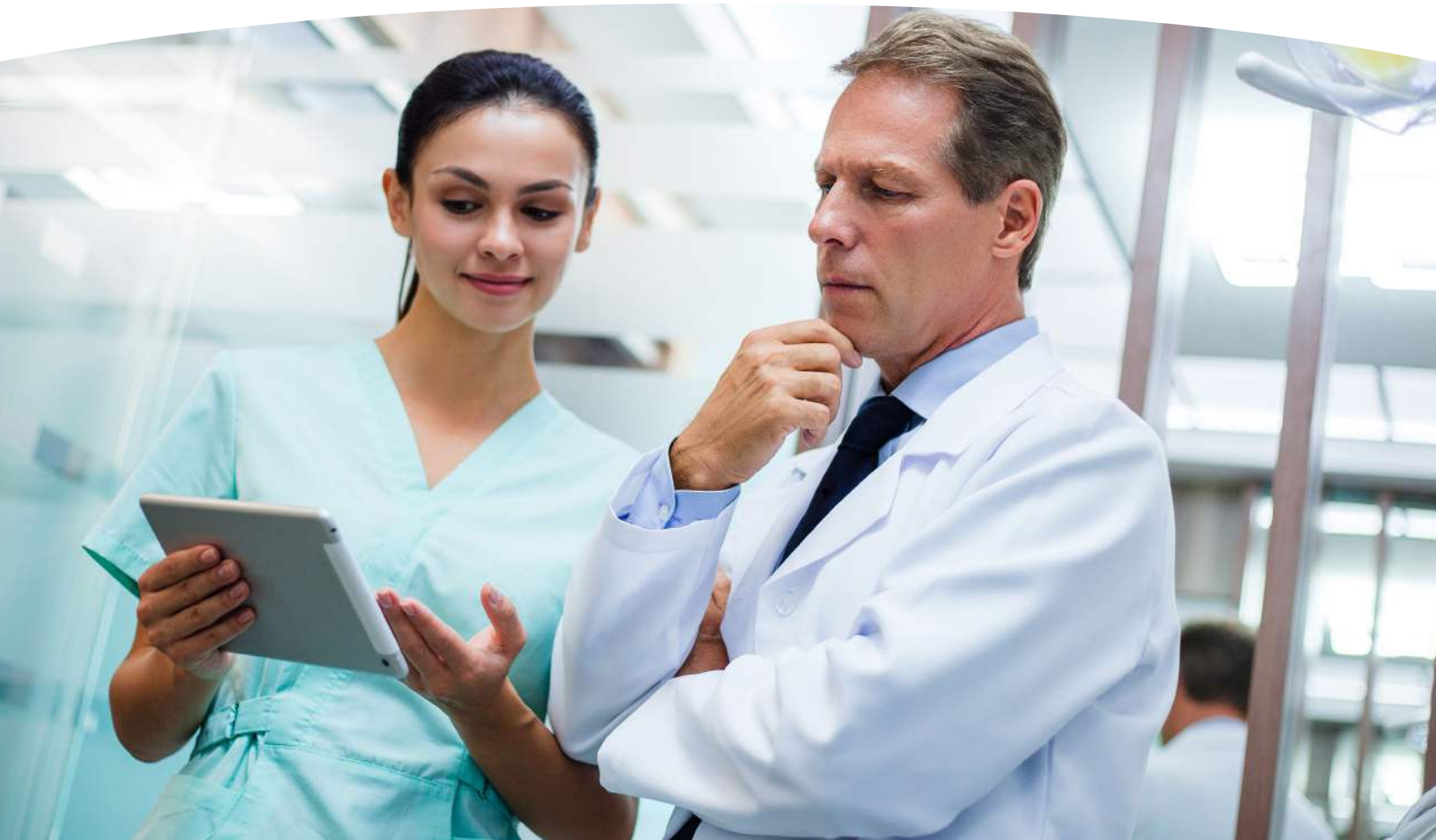
10 Essential Growth Tips for DSOs and Dental Groups

- ✓ Define your growth goals and KPIs.
- ✓ Build an operating model that supports scale.
- ✓ Align operational priorities with long-term strategy.
- ✓ Modernize operations with cloud-based solutions.
- ✓ Ensure interoperability with open APIs.
- ✓ Automate workflows to support scalability.
- ✓ Improve performance through RCM visibility.
- ✓ Build custom reports for growth opportunities.
- ✓ Track trends to inform proactive decision-making.
- ✓ Utilize digital tools to improve patient experience.

Powering Growth with Advanced RCM Tools

An outdated revenue cycle management (RCM) system is a common barrier to scaling a dental group or DSO, causing inefficient workflows and an inability to easily view, track, and manage essential financial data all in one place.

An advanced RCM platform automates and unifies processes across multiple practices helps DSOs and dental groups remove roadblocks, improve accuracy, and operate more efficiently to streamline cash flow and increase revenue. Everything related to revenue can be tracked and managed, including insurance payments and reconciliation, claim follow-up, insurance eligibility verification, patient payments, and more.



Improve performance through end-to-end RCM visibility.

Easy access to financial data that is automated across multiple locations is a key benefit of using an optimized, cloud-based RCM platform that's built specifically for DSOs and dental groups. This visibility facilitates data-driven decision-making by highlighting any potential issues and areas in need of attention.

Software like Planet DDS Pay is designed to optimize financial operations for DSOs and dental groups. **By integrating into practice management software, Planet DDS Pay centralizes financial activities and removes obstacles that can slow down collections.** It enables dental organizations to maintain accuracy in financial reporting, automate essential billing functions, and provide a smoother payment experience for dental teams and patients.

"Managing payments and revenue across multiple locations is a significant challenge for DSOs," said Eric Giesecke, CEO of Planet DDS. "Planet DDS Pay streamlines this process by accelerating payment collection, automating revenue cycle management, and enhancing both security and the patient experience."



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Leveraging Data to Guide Growth Decisions

With instant access to reporting and financial overview, cloud-based RCM software provides insights into collections, revenue, insurance benefits, and standing of claims. Advanced reporting enables actionable operational insights to help identify problems and opportunities across the entire organization.

Reviewing operational performance enables DSOs and dental groups to take a proactive, strategic approach—highlighting existing efficiencies, areas for improvement, and opportunities for better resource allocation. Here are methods you can use to optimize data performance:

Build custom reports to identify opportunities for growth.

Growing a dental group or DSO requires making informed, data-backed decisions that support business development. Dental practice management software should offer flexibility in developing custom reporting that aligns with the growth goals of your organization.

Effective reporting tools deliver both high-level overviews for quick insights and detailed breakdowns tied to KPIs. These reports help highlight what's working and what needs adjustment—such as scheduling gaps, patient retention trends, no-show patterns, and payment collection metrics—ensuring each area of the organization is accountable to measurable goals.

Track trends to inform proactive decision-making.

The ability to identify problems before they occur is a powerful advantage. Predictive analytics generated within data analysis helps your DSO or dental group effectively forecast appointment demand, optimize staffing requirements and schedules, and anticipate patient needs. These insights not only improve daily operations but also help guide long-term growth strategies.

Retaining and Attracting Patients to Grow

As your dental group expands, retaining existing patients while attracting new ones becomes increasingly important to long-term success. Achieving growth requires operational efficiency and the ability to deliver consistently positive experiences that meet patient expectations for convenience, clarity, and communication. Apply these tips to better connect with patients:

1. Utilize digital tools to improve patient experience.

An integrated dental platform should enable automated messaging, digital billing, appointment follow-ups, and real-time notifications. These tools reduce friction at every touchpoint, helping patients feel informed and cared for throughout the process.

An ADA Health Policy Institute study found that more than 80% of dental providers cited late cancellations and no-shows as a major barrier to maintaining full schedules. Online scheduling and automated reminders reduce administrative workload while improving chair uptime—key factors in delivering accessible, efficient care.

80%+

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[ADA Health Policy Institute](#)

2. Prioritize patient convenience during expansion.

Maintain patient access across multiple locations. Real-time booking, secure patient portals, and SMS/email communications support consistency and reduce frustration. This level of accessibility strengthens patient loyalty and supports long-term engagement.

Achieve Sustainable Growth for Your Organization

For DSOs and dental groups, sustainable growth requires strong operational systems, centralized data, and the ability to act quickly on performance insights. Cloud-based dental practice management software helps organizations streamline workflows, standardize processes, and access real-time data across locations.

A resilient growth strategy balances smart acquisitions with operational discipline. When supported by scalable systems and technology, DSOs can adapt quickly, reduce friction, and position their teams for long-term success.



Contact us to explore how we can support your DSO or dental group for growth success.

BOOK A DEMO



cloud 9 | apteryx | denticon

Dental software is broken. We aim to fix it. As a partner in growth for DSOs and dental groups, Planet DDS delivers a cloud-based platform designed to scale alongside growing organizations. Powered by DentalOS™, its open platform includes Denticon Practice Management, Cloud 9 Ortho Practice Management, and Apteryx Cloud Imaging. Trusted by leading DSOs and emerging dental groups nationwide, Planet DDS enables 13,000+ practices and 118,000 users to move beyond outdated legacy software with seamless integrations, optimized workflows, and scalable technology built for growth.