



PART 1:

Change Management for DSOs and Dental Groups Laying the Groundwork

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Adopting new dental technology is a major investment, but the real return depends on how prepared your organization is **before implementation even begins**. For DSOs and dental groups, the earliest phase of a platform transition is where the most impactful work happens. Before onboarding starts, teams need alignment, leaders need clarity, and the organization needs a shared understanding of what's changing and why.

Change management in the dental industry requires setting expectations, defining responsibilities, and preparing every part of the organization to work toward the same goal.

This guide focuses on the pre-implementation phase and what DSOs and dental groups can do now to create the structure and momentum needed for long-term success.

What Change Management Really Means for DSOs

In dental organizations, change often comes in the form of a new system or software. But what really needs to change is **how teams think, communicate, and work**. This is what makes change management a strategic effort, beyond a technical one.

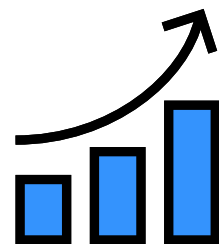
With the U.S. dental software market projected to reach [6.9 billion](#) by 2034, DSOs and dental groups are under pressure to get it right the first time.

What change should include before you get started:

- ✓ A shared understanding of how new systems will affect clinical, operational, and IT teams
- ✓ Leadership support that goes beyond approvals and includes direct involvement
- ✓ Clear alignment between departments about roles, responsibilities, and timelines
- ✓ Internal planning that begins before onboarding

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[Market.us, 2025](#)



When DSOs and dental groups treat change management as a cross-functional process, they create stronger foundations for adoption, even in large, complex environments.

Xavier Gardner, Key Account Manager at Planet DDS shared: “There has to be something from the ownership or leadership team that embraces the change head-on with the team members who are going to be using the software. There needs to be communication as to why the change is happening and what benefits it has for them.”

Too often, teams underestimate how much cross-departmental clarity matters. Even the best tools fall flat when teams don’t understand the “why” of how their workflows will change, who’s responsible for rollout steps, or how to escalate concerns. **Making change management part of early planning helps eliminate silos and build lasting alignment.**



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XAVIAR GARDNER

Key Account Manager
Planet DDS

How Organizations Evaluate Change Readiness

The signs of a well-prepared organization show up in how teams talk about the change, whether leadership is aligned, and how much structure exists before implementation begins.

The signs your DSO is ready to change (or not):

- ✓ Ownership is clearly assigned, and team members know who to turn to for updates or decisions.
- ✓ Operational workflows are well-documented and communicated across departments.
- ✓ Employees are informed early on and initial concerns have been addressed.
- ✓ Internal planning includes more than just IT or project managers.

Organizations that take time to assess readiness often uncover gaps that would otherwise become major operational blockers during onboarding.

This phase is also where buy-in starts to take shape. Team members who feel informed and involved from the outset are more likely to buy in, becoming advocates for change, helping carry momentum forward when things get complex. That early sense of inclusion can significantly influence adoption later.

Clarity about why the change is happening gives team members a stronger sense of purpose, making it easier for them to stay engaged when challenges arise.

Common Pain Points Before Implementation Begins

Many of the challenges that surface with implementation start earlier, when planning is rushed, responsibilities are unclear, or communication doesn't reach the right people.

What to watch out for:

- Misalignment between operations, IT, and clinical teams
- Conflicting expectations about timelines, resourcing, or rollout structure
- Limited communication around why change is happening and what teams should expect
- Frustration from team members who weren't involved in early discussions

Gardner explained: "Change management is difficult in our industry because most users have been using the same software for a long time. They are used to the nuances of existing software. There's a nervousness and anxiety that comes when they hear they are moving to new software."

While these problems are common, they're also addressable. **When DSOs and dental groups recognize the early signs and create space to plan more effectively, the transition is easier for everyone involved.**

Large organizations may face additional issues due to size and complexity. Individual practice managers might receive different messages than corporate teams, creating inconsistency and frustration. Investing time in unifying messaging across all levels is key.



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Misconceptions That Undermine Change

One of the most overlooked barriers to adoption is how teams think about change in the first place. Assumptions about what the transition will involve can set your team up for confusion or delay before onboarding even begins.

Common assumptions from teams:

- ✓ Believing the transition is a simple software update rather than a workflow shift
- ✓ Assuming prior experience with other systems will make this transition easier
- ✓ Expecting the provider to manage all aspects of the rollout
- ✓ Relying on training alone to drive team understanding and adoption

45%+

of dental professionals now cite rising operational issues as their top concern.

[Benesch Law, Dental/DSO Industry Newsletter, 2025](#)

DSOs and dental groups that challenge these assumptions early can prepare teams more realistically and create a smoother experience across departments.

More than [45%](#) of dental professionals now cite rising operational issues as their top concern, highlighting how unchecked assumptions can add unnecessary strain.

It's also important to clarify that each software transition is unique. What worked during a previous change may not apply here, particularly when cloud-based platforms or multi-location considerations are involved. Resetting expectations is a key leadership task in this phase.

Aligning Leadership and Ownership Before Change Begins

Technology transitions require buy-in, but more than that, it involves leadership. Success depends on whether the right people are involved in the right ways, with clearly defined responsibilities.

Key actions for leadership teams:

- Assign ownership across key departments, especially operations and IT.
- Identify and enlist the help of a well-respected internal champion who can advocate for change.
- Align leadership in communication strategy and timing.
- Discuss potential resistance points before rollout and build a plan to address them.

When DSOs and dental groups prioritize internal alignment, it signals that the transition is being led intentionally. That confidence tends to cascade across the organization.

Gardner noted, “The most successful clients have their own ‘secret sauce’ in terms of what they do with enablement, what modules they use, and how they use them. But it starts with leadership buy-in and a clear plan.”



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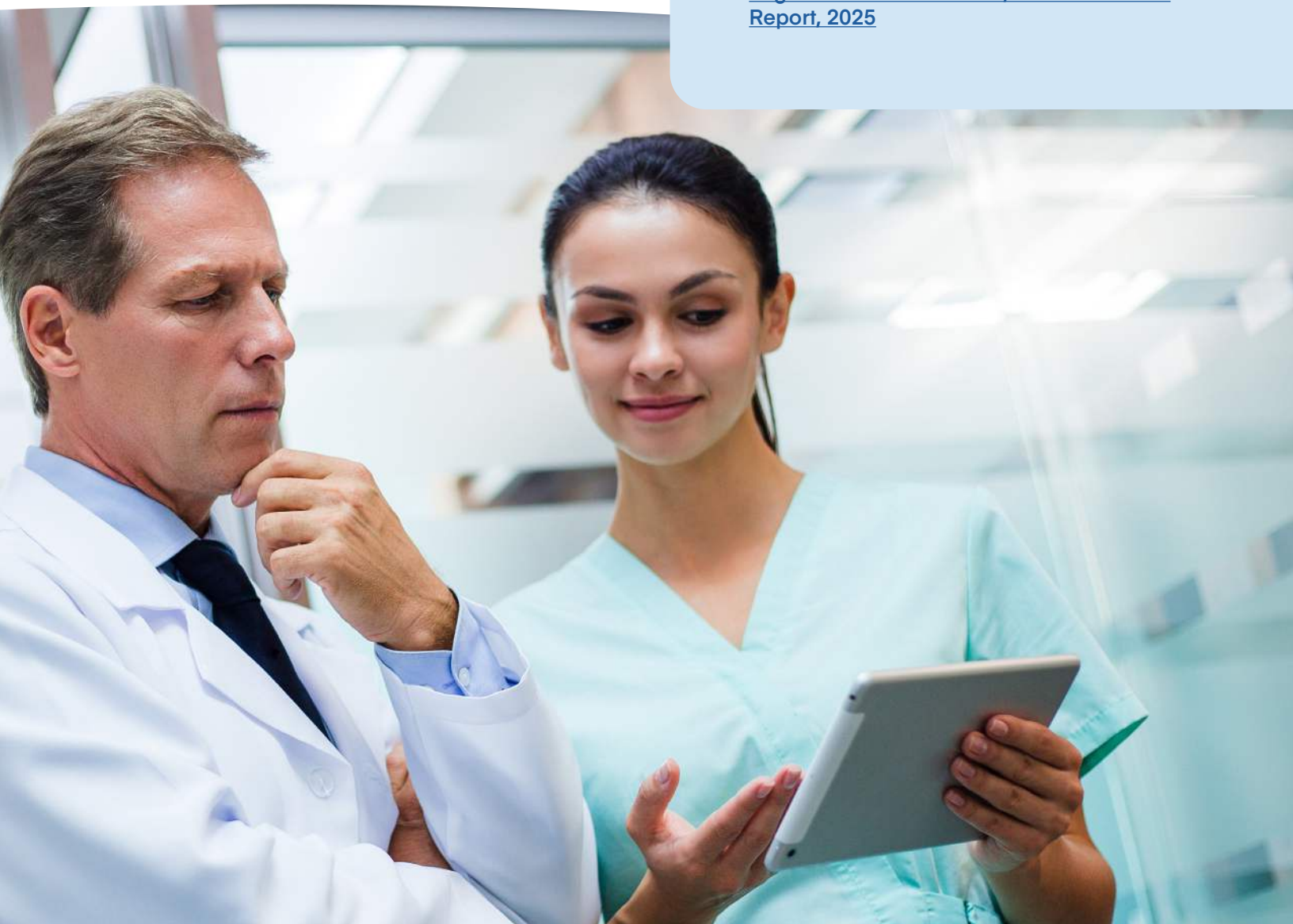
XAVIAR GARDNER
Key Account Manager
Planet DDS

Assigning a named owner for each area of change—technology, process, and communication—gives the project the oversight it needs. These champions become the go-to resource for teams who need reassurance or direction.

With the DSO market projected to grow [17.6%](#) annually and reach 830.6 billion by 2034, aligning leadership roles before change begins is a key differentiator for organizations scaling at pace.

**The DSO market is
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[Precedence Research, Dental Service
Organization Market Size, Share & Trends
Report, 2025](#)



Roles of Sales, Implementation, and AM Teams

The sales, implementation, and account management (AM) teams of the software provider play a bigger role in change readiness than many organizations realize.

From the first sales call, expectations can be set in ways that prepare teams. That's why early collaboration and transparency between internal and client teams matters.

"The most important thing is setting expectations early," said Carlos Vallecillo, Director of Sales at Planet DDS. "We're not just selling software; we're setting the foundation for growth and efficiencies that has to be communicated from the first conversation."



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CARLOS VALLECILLO

Director of Sales
Planet DDS

Questions to ask in the process:

- ❓ Are they being honest about the level of effort required and where internal planning is needed?
- ❓ At each stage, are they introducing you to the appropriate teams from sales, implementation, and account management to ensure a smooth handoff?
- ❓ Do they have checklists, timelines, or templates that help structure the transition from other customers that are like yours?
- ❓ Are they aligning with your internal champions to clarify roles and expectations on both sides?

“The best transitions happen when we’re aligned with the internal project owner early,” said John Adams, Account Executive at Planet DDS. “That’s the person who can keep things moving and make sure everyone internally is on the same page.”

When sales and AM teams collaborate with clients early, **transitions start with fewer surprises and more structure.**

Some DSOs or dental groups benefit from having an internal debrief after each sales or implementation call to capture new learnings or clarify action items. This helps ensure that internal priorities are aligned with the provider’s guidance before planning ramps up.



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JOHN ADAMS

Account Executive
Planet DDS

Setting the Tone for a Successful Transition

Early warning signals often surface when sales first start engaging with the organization. The clearest insights about change readiness come up long before implementation. Raise questions early as concerns arise to keep stakeholders informed.

Common Concerns:

- ✓ You may want to ask questions about what can be done to mitigate potential disruptions to clinical operations during rollout.
- ✓ Ask if you have uncertainty about how implementation responsibilities will be assigned for your specific organization.
- ✓ Ask for best practices on managing team member concerns about changing workflows after years on the same system.
- ✓ Check in about what your team will own versus the vendor's teams when it comes to implementation or change management tasks.

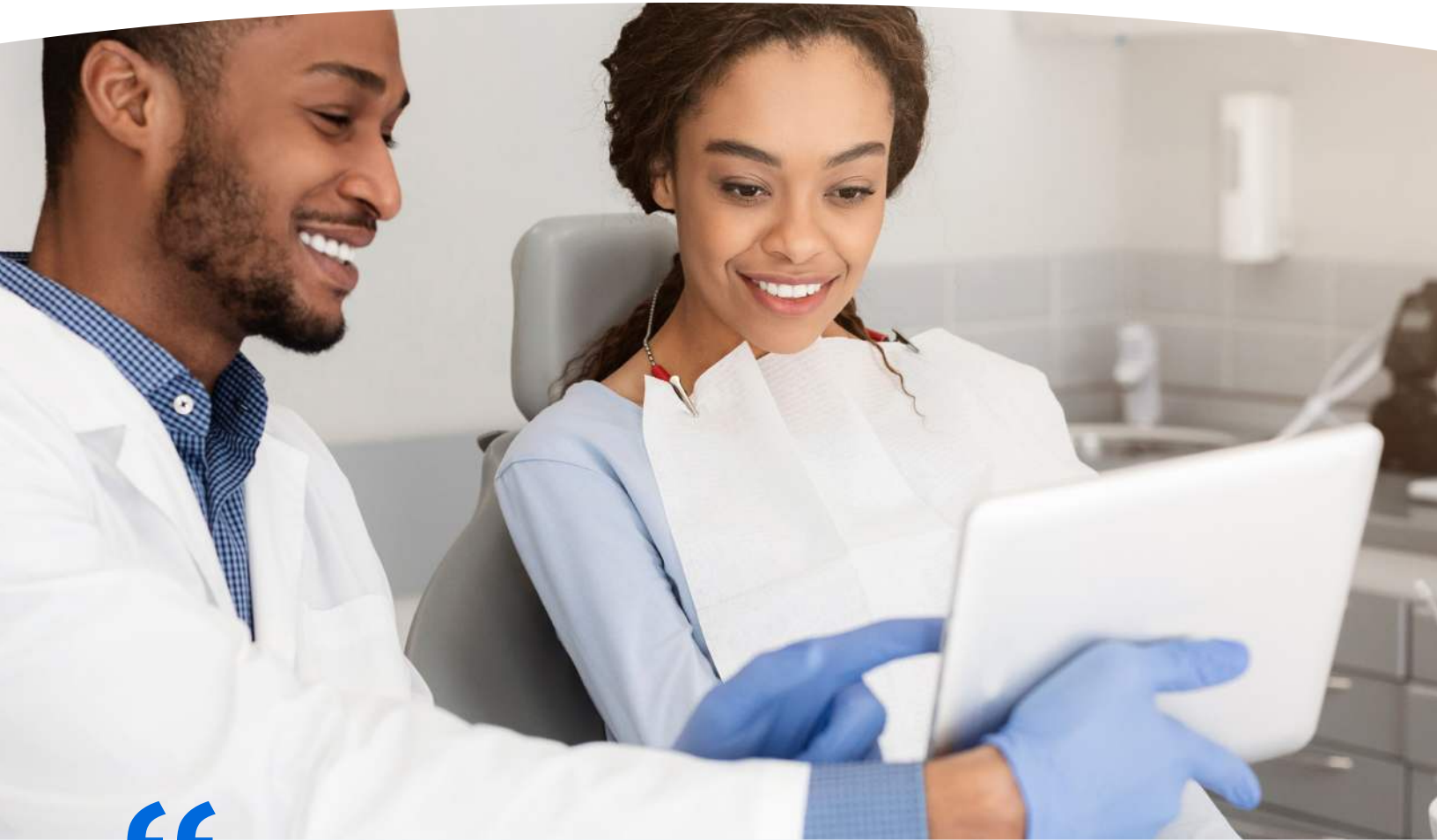
A vendor that is ready to partner with you will provide clarity and guidance throughout the process and keep communication lines open for any potential concerns.

"When you're working with a multi-location group, there's already complexity," said Adams. "Our job is to help them anticipate what's coming and give them a structure to build from."

The earlier those concerns are heard, the earlier they can be addressed. This helps DSOs prevent misalignment later and creates a stronger foundation for rollout.

Vallecillo added: “Our clients need to understand the whole experience: what’s needed from them, and how long it takes, who needs to be involved.”

This insight often becomes the foundation of a more collaborative onboarding strategy, one that aligns what the DSO or dental group is trying to accomplish with the steps needed to get there.



“

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CARLOS VALLECILLO
Director of Sales
Planet DDS

Resources That Lay the Groundwork for Success

A well-prepared organization rarely starts from scratch. The right tools, documents, and discussion guides can help DSOs organize internally and build consensus before onboarding even begins.

Pre-implementation tools to consider:

- ✓ Stakeholder alignment maps and readiness assessments
- ✓ Change management plan templates that include communications and milestones
- ✓ Internal kickoff agendas to help teams prepare before the vendor kickoff
- ✓ Recommendations for outside consultants (when needed) to guide strategic planning.

Sara Ettinger, Key Account Manager at Planet DDS, pointed out: “For smaller or mid-sized groups that don’t have the same type of infrastructure, it’s important to build that infrastructure sooner rather than later. It also gives a contingency plan for training when there’s inevitable turnover. If they don’t have enough power users, they end up struggling when one person leaves.”

These materials become most useful when combined with early leadership support and a culture of transparency.

Even simple internal planning templates, like a communication calendar or readiness checklist, can create structure for organizations that don’t yet have a formal change process.

Strategies for Smoother Transitions

Successful transitions share common traits. They start with thoughtful planning, including the right stakeholders and focus on adoption.

Tips that work for organizations:

- ✓ Begin efforts for cross-functional buy-in and planning before a final platform decision is made.
- ✓ Define what success looks like beyond go-live, including adoption and team feedback.
- ✓ Create regular checkpoints for departments to share concerns or updates.
- ✓ Build a shared vocabulary and communication plan for the rollout.

Small adjustments in how teams prepare can lead to significant improvements in how capable they feel when it's time to make these changes.

This preparation also allows teams to maintain momentum post-launch. Instead of reacting to confusion or pushback, the organization can focus on optimization and long-term performance improvements.

"It's not usually the technical parts that break down a rollout," said Ettinger. "It's usually because someone on the team is struggling, or they didn't get the right support, or the organization didn't prepare them for it. It's always the human side."



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SARA ETTINGER
Key Account Manager
Planet DDS

Get Prepared for Change Implementation Now

Adoption starts before implementation. **The organizations that see the strongest results from new technology tend to be the ones that plan for change and for rollout.** When leadership is aligned, roles are clear, and teams are informed, the transition becomes less about disruption and more about momentum.

Keeping the “why” visible throughout the process ensures teams understand the purpose behind each step and remain committed to the outcome. By treating change management as part of your core strategy—not a side task—you give your teams a clearer path forward and create more value from day one.



Ready to lead
change and
drive results?

Contact us today

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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.