



## PART 2:

# Change Management for DSOs and Dental Groups Leading Teams Through Transition

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# Congratulations!

## You now have a new dental practice management platform.

### Now What?

Signing the contract for a new practice management platform is an exciting milestone, **but it's only the beginning.** The real transformation happens after the ink dries, when teams must shift daily workflows, adapt to new routines, and adjust patient experiences.

"Changing practice management systems in the dental environment can be extremely disruptive to practices," expressed Laurel Cooksey, Senior Director of Business Systems at Specialty Dental Brands. "You have to manage the process the right way from the start."

**A successful rollout starts with people.** When teams have clarity, the right tools, and visible support, they adapt faster and with more confidence. The best DSOs don't just launch software; they lead and support their teams through the change.



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**LAUREL COOKSEY**  
Senior Director of Business Systems  
Specialty Dental Brands

# How to Lead Your Team Through a Change Transition

“One of the first things we do is understand everyone’s ‘why,’ starting with leadership and extending out to each doctor and office manager,” shared Jill Nesbitt, Founder of Optimize Dental Consulting. “When people are clear on the purpose for a software change, it creates alignment before you even start talking about which solution to implement. Taking time for these conversations makes the transition smoother and accelerates adoption across the organization.”

And the stakes are high. Without intentional change management, a rollout can stall, frustrate teams, and hurt productivity. **With the right approach, it can create scalable workflows, happier teams, and better patient experiences.**



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**JILL NESBITT**  
Founder  
Optimize Dental Consulting

# Know When to Hold Steady and When to Escalate

Once implementation begins, bumps are normal. The challenge is distinguishing between short-term turbulence and deeper issues that require immediate action.

## Escalate when you see:

- ✓ Critical reporting gaps that block multi-location visibility
- ✓ Promised functionality still missing after agreed timelines
- ✓ “Integrations” that don’t work as expected and disrupt workflows
- ✓ Persistent workflow slowdowns even after training and adjustments

These are structural problems that should be addressed quickly with your vendor’s implementation or support teams.



## Expect friction early on:

Early resistance, the learning curve, and temporary productivity dips are part of the process. **The risk comes when leaders mistake these normal pains for signs the platform won't work long term.**

"Expect resistance, but don't let it derail progress," said Dr. Charmaine Felix of InterDent. "Normalize the frustration that comes with learning something new, but pair it with consistent encouragement and real-time support."

**The key is to diagnose the root cause.** If pushback comes from uncertainty or discomfort, targeted communication and training can turn skeptics into advocates. If it's a platform limitation, escalate quickly to avoid frustration taking root.



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**DR. CHARMINE FELIX, DDS**  
InterDent

# If You Prioritize Anything First, It's Your Team

**Technology adoption is a people-first challenge. Without genuine buy-in, even the most advanced platform will falter.**

"To provide a meaningful 'why' to the team, you have to go back to discovery and understand their current processes," said Cooksey. "The 'why' may be the same for DSO stakeholders, but it won't be the same for everyone experiencing the change."

For a dentist, the "why" might be faster clinical charting. For a front desk coordinator, fewer duplicate entries. For an operations leader, better reporting and visibility. **Every role's "why" matters.**

Buy-in starts with trust, built through being candid about what's ahead. "This is going to be a really tough change," said Cooksey. "It's going to disrupt your productivity for minimum, a thirty-day period."

Transparency also means never minimizing change. "Never say that nothing is going to change," said Kara Trail, Director of Operations at Henritze Dental Group. "Be upfront with people and acknowledge the feelings they're having so you can work together to address their concerns and come up with a game plan."

Alongside that transparency, **momentum builds when teams can see the wins.** Calling out what's going well, even in small ways, reinforces progress and keeps buy-in alive across roles and locations.



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**KARA TRAIL**  
Director of Operations  
Henritze Dental Group

## Ways to strengthen buy-in:

- ✓ Share role-specific wins that show tangible benefits.
- ✓ Keep the “why” visible in every meeting and update.
- ✓ Identify and empower champions in each practice.
- ✓ Celebrate small milestones post go-live.

“If you can find a champion, one of the key stakeholders, your buy-in and the success of the rollout are impacted exponentially,” noted Cooksey.



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**LAUREL COOKSEY**

Senior Director of Business Systems  
Specialty Dental Brands



# Know Before You Go: The Pre-Conversion Checklist

**Many post-sale headaches stem from rushed preparation. The work you do before go-live directly impacts your first ninety days.**

Pamela Holder, Chief Strategy Officer at Advanced Dental Brand, advised: “The key is preparation: It’s accurate auditing so you know what will convert as expected, accurate fee schedules loaded, accurate provider information, and accurate data mapping. That’s the foundation.”

## Checklist for a smoother start:

- ✓ Confirm data mapping and test migration in a sandbox.
- ✓ Assign location-level go-live leads.
- ✓ Document current workflows.
- ✓ Plan patient communication (signage, email, in-office talking points).
- ✓ Schedule live and on-demand training.
- ✓ Define support roles and escalation paths.
- ✓ Clean your data before migration.



**The key is preparation:** It’s accurate auditing so you know what will convert as expected, accurate fee schedules loaded, accurate provider information, and accurate data mapping. **That’s the foundation.**



**PAMELA HOLDER**  
Chief Strategy Officer  
Advanced Dental Brand

“Do your due diligence,” Cooksey suggested. “Take time to understand the practice and include the people closest to the work. Identify how to get the buy-in of that partner, doctor, or office manager before you put your plan together.”



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**LAUREL COOKSEY**

Senior Director of Business Systems  
Specialty Dental Brands

# When It's Training Time, Be Ready with a Plan

Training should be phased, role-based, and reinforced.

## Training best practices:

- ✓ Start with early demos.
- ✓ Mix live and recorded sessions.
- ✓ Train with real patient scenarios.
- ✓ Ramp up patient load: 50% on day one, 75% on day two, and 100% on day three.
- ✓ Maintain an open feedback loop.

"I always tell the teams to not over-fill their schedule on the go-live day," said Etta Bourne, Vice President of Systems Integrations at Premier Care Dental Management. "Give yourself a little extra time to get used to the new workflow."



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### ETTA BOURNE

Vice President of Systems Integrations  
Premier Care Dental Management

## Implementation best practices:

Once you go live, the focus shifts to adoption and optimization. Leadership presence, empathy, and process discipline matter most. Even small touches—like banners or balloons—can uplift teams on go-live day.

Cooksey advises teams to:

- ✓ **Be transparent about challenges:** Acknowledge the elephant in the room—this change is going to be difficult. Recognize that the current system touches every part of the practice and every team member.
- ✓ **Respect practice culture while standardizing:** Allow practices to maintain a level of choice. Take time to understand how they currently use the system and adapt those workflows as closely as possible in the new software.
- ✓ **Support those who struggle:** Divert resources to those who are struggling early on, whether it's a dental assistant or an insurance coordinator, to assist with overall adoption and prevent friction among the whole team.
- ✓ **Measure adoption with intention:** Do a three-part survey the first week of go-live to capture training experience and accomplishments, another at 30 days to check for pain points, and then again at 60 days.



# When to Bring in an Outside Consultant

**Some transitions call for additional guidance, especially when DSOs lack internal resources, face staffing turnover, or need to unify offices after merger and acquisition (M&A) activity.**

In these cases, outside consultants can bring the structure and support that internal teams don't always have the resources to provide.

"The right time to bring in a consultant is when the internal team doesn't have the bandwidth or the experience to manage the change, and when there's a big enough business problem that it's worth solving well." said Nesbitt.



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**JILL NESBITT**  
Founder  
Optimize Dental Consulting

## How a guide can help:

- ✓ Consultants can step in when offices are overwhelmed or facing burnout.
- ✓ They provide structure, from role-based workflows to training timelines and change communication plans.
- ✓ They help connect each team member's role to the bigger picture, translating strategy into role-specific actions.
- ✓ Advisors offer a fresh, unbiased perspective on what's working and what need improvement.

Change management specialists can create clarity in fast-growing organizations that lack standardized processes. "So many DSOs are growing fast and don't have SOPs documented across every role," said Nesbitt. "Consultants can help create the structure that's missing."

And when teams face roadblocks, that outside perspective can make the difference. "Consultants bring objectivity," Nesbitt added. "We're not caught up in office politics. We can say, 'Here's where you're stuck, and here's how to move forward.' That perspective can shift everything."

**That outside support is often what keeps momentum going, especially when teams face internal setbacks or unexpected change.**

"If you lose even one or two key team members, the whole rollout slows down," said Xavier Gardner, Key Account Manager at Planet DDS. "That's why the best leaders I've seen go all in on change management: bringing in consultants, getting executives to talk directly to staff, and even making go-live day a celebration. It makes a huge difference."



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**XAVIAR GARDNER**  
Key Account Manager  
Planet DDS



The daily demands of dental offices make it easy for change efforts to get lost in the shuffle.

“I worked in a dental office,” said Sara Ettinger, Account Executive Director at Planet DDS. “It’s chaos. You forget to eat lunch, let alone how to manage a complex software change. Consultants bring calm to the chaos. Their job is to remind you why this change matters and walk your team through how to do it.”



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**SARA ETTINGER**  
Key Account Manager  
Planet DDS

## Times to involve a consultant:

- ✓ Before go-live, to support discovery, rollout planning, and training readiness
- ✓ Mid-implementation, if adoption is stalling or resistance is growing
- ✓ Post-go-live, to improve workflows, reinforce change, and measure results

Consultants don't just support the software; they support the humans using it. For organizations going through high change or limited resources, the right guide can turn disruption into momentum.





# How Planet DDS Partners with You to Manage Change

**Rolling out a new practice management solution is about aligning leadership, preparing teams, and building momentum so adoption sticks. Our structured approach supports that process from day one.**

“Change management is central to how we support our customers through onboarding,” shared Molly Gapp, Vice President of Professional Services at Planet DDS.

## Our implementation approach:

- ✓ **Kickoff and alignment:** Begin the project with a kickoff that includes contract review, expectation-setting, and onsite planning for more than ten locations.
- ✓ **Office selection:** Choose early offices with strong leadership and a willingness to change.
- ✓ **Best practices:** Embed proven workflows into the software and process.
- ✓ **Risk and stakeholder management:** Tailor engagement based on size, structure, tech stack, and decision-maker alignment.
- ✓ **Education and training:** Provide role-based, phased training with feedback from surveys and LMS data.
- ✓ **Communication support:** Provide leadership messaging, documentation, and talking points.
- ✓ **Lessons learned:** Conduct post-launch reviews and feed the results into playbooks, training, and product enhancements.

“As someone who sees it firsthand, it’s rewarding to watch how effective change management can transform a rollout,” said Gapp. “We see higher adoption rates and happier teams.”



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**MOLLY GAPP**

Vice President of Professional Services  
Planet DDS

# Lead the Change, Don't Just Survive It

Post-sale change management is the bridge between purchase and value. Done well, it builds **trust, momentum, and measurable improvement.**

"Change management is about trust-building and figuring out the personal 'why' behind what you're doing," explained Cooksey. "For any implementation to be successful, you have to meet those things."

If your DSO or dental group is preparing for a system change, prioritize people, plan deliberately, and lead with empathy. **The technology is only as strong as the team using it.**

The Planet DDS team has guided hundreds of organizations through successful transitions. Denticon and our implementation experts can help you balance standardization with local autonomy, minimize disruption, and achieve faster adoption.



Explore practical ways to guide through change.

**Contact us today**

**BOOK A DEMO**





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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.