Scaling Smarter with Standardization

How DSOs and Dental Groups Can Build a Scalable, Efficient, and Patient-Centered Future

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Why Standardization Matters to DSOs and Dental Groups

Growth-minded dental support organizations (DSOs) and dental groups face an urgent question: How can they scale without sacrificing quality, compliance, or culture?

The answer lies in standardization across technology, workflows, and systems.

For multi-location groups, standardization isn't about rigidity. It's about creating repeatable, scalable processes that improve patient care, reduce redundancy, and make future expansion easier.

"As patients adapt to this new world, if you're not standardizing and upgrading and providing a consistently excellent experience, you're not going to keep those patients," said Josh Gwinn, a 20-year healthcare veteran and former CEO of Hero Practice Services. Gwinn is the founder and CEO of Optimize Practice Alliance, a consulting company that optimizes operations, integrates artificial intelligence, and increases profitability.

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The Strategic Benefits of Standardization for DSOs

Standardization creates advantages across every part of a dental organization, starting with the core functions that keep daily operations running smoothly.

OPERATIONAL EFFICIENCY

- Streamlined processes reduce redundancy and confusion.

- Standard protocols simplify training, onboarding, and accountability.

- Practices run more predictably, improving patient and employee experience.

SCALABILITY

- Consistent workflows allow DSOs to expand operations and add locations without chaos.

- Acquired practices can integrate faster into the existing system.

COST SAVINGS AND ECONOMIES OF SCALE

- Standardized procurement and bulk purchasing drive down supply costs.

- Centralized billing, HR, and marketing reduce overhead and improve margins.

QUALITY AND COMPLIANCE

- Uniform clinical and administrative standards help ensure compliance with OSHA, HIPAA, and insurance coding regulations.

- Patients receive consistent, evidence-based care across every location.

DATA-DRIVEN DECISION-MAKING

- A unified practice management system (PMS) enables consistent data capture.

- Executives can easily identify performance gaps, track KPIs, and predict growth opportunities.

ENHANCED PATIENT EXPERIENCE

- Predictable scheduling, billing, and communication make visits smoother.

- Whether a patient visits one affiliated practice or multiple locations, their experience feels seamless.

STRONGER BRAND IDENTITY

- A consistent look, tone, and patient journey strengthen brand trust.

- Marketing and messaging align across all locations, reinforcing credibility.

INNOVATION AND CONTINUOUS IMPROVEMENT

- Standardized systems make it easier to test and implement new technologies like AI imaging or automated billing.

- Innovation becomes part of the organization's DNA.

Standardization Starts with Mapping Processes

It can be daunting to decide when and where to start.

"Standardization should start immediately, and it should start in two places," advised Gwinn. "First, map the patient experience from first contact through the end of the payment cycle, and then map out how money flows through your practice from billing through closing an insurance claim and collecting the correct amount."

Mapping the patient journey

The first step is identifying every touchpoint a patient has with the practice. Common examples include:

✓ **Digital presence:** Does your social media reflect real people and authentic patient interactions?

✓ **Website**: Is it user-friendly with clear booking options, including online scheduling?

✓ **Communication:** Are text and email protocols consistent before and after appointments?

✓ **In-office experience:** What does check-in look like? What's the wait time? How are handoffs managed?

✓ **Post-care:** Do you request online reviews and clearly communicate payment options?

Mapping the financial journey

Understanding how money flows through your organization is equally vital:

- ✓ Where are claims getting stuck?

- ✓ How consistent is billing accuracy across locations?

- ✓ How long does it take to close an insurance claim and collect?

- ✓ What are your processes for collecting money at the time of the appointment?

- ✓ What is your standard operating procedure for notifying patients when payment is due?

- ✓ What are the different ways patients can pay their bill?

When Josh Gwinn led Hero Practice Services, a healthcare management company that supported services for children in more than 25 locations across seven states, his team saw transformational results.

"When I was at Hero, we had five practice management systems," said Gwinn. "We transitioned all of them to one PMS that could handle dental, orthodontic, and vision modules and created one source of truth for data."

The outcome?

- ✓ Predictable operations and easier inventory management

- ✓ Bulk purchasing that reduced supply costs

- ✓ A tripling of the bottom line

"When you combine automation and standardization and predictability with a great culture, you reduce turnover," Gwinn said.

Implementing Standardization: Step-by-Step Framework

A repeatable framework makes standardization easier to implement across locations. Follow these steps to guide your organization through the process:

1 CENTRALIZE KEY BUSINESS FUNCTIONS

Most DSOs begin with back-office operations where efficiency gains are immediate and measurable.

Centralized functions include:

- ✓ **Revenue cycle management (RCM):** Standard billing, coding, and verification reduce denials and improve cash flow.

- ✓ **Procurement and supplies:** Group purchasing and approved vendor lists lower costs.

- ✓ **Human resources and training:** Consistent onboarding, reviews, and development foster a unified culture.

- ✓ **Marketing and communications:** Unified brand voice across websites, email, and social channels helps build trust and recognition.

Read the Centralization Strategies E-Book

Aligned Dental Partners

A $5.1 million dental practice with an EBITDA margin of just 13%—well below the expected 24%—partnered with Aligned Dental Partners to standardize procurement. Aligned Dental is a consulting and management firm that works with entrepreneur dentists, group practices, and DSOs.

What they discovered:

- ✓ Multiple suppliers and labs created inconsistent pricing.

- ✓ No product formulary meant variation in materials and higher costs.

- ✓ Reactive purchasing led to overspending and inventory waste.

Aligned Dental Partners' solution:

- ✓ Implemented procurement software to track budgets in real time

- ✓ Created a standardized formulary across the clinical team

- ✓ Consolidated vendor relationships for volume discounts

- ✓ Established approval workflows and accountability

aligned dental partners

The results:

- ✓ 18% reduction in cost of goods sold
- ✓ $146,000 increase in free cash flow
- ✓ Improved valuation and EBITDA

The team at Aligned Dental Partners has supported **more than 1,000 practices** through all phases of their lifecycles including building, scaling, and transitioning dentist-owned and dentist-led practices.

"Most teams don't realize how much inefficiency exists in everyday ordering habits, from inconsistent vendors to unmanaged pricing," said Jen Hengtgen, senior dental consultant at Aligned Dental Partners.

"Standardization creates a more predictable, data-driven system and a scalable foundation for growth," she said.

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JEN HENGTGEN
Senior Dental Consultant
Aligned Dental Partners

2 STANDARDIZE CLINICAL PROTOCOLS FOR CONSISTENT CARE

Clinical standardization ensures every patient receives the same high-quality treatment, regardless of the doctor or location.

That's the philosophy of Dr. Cindy Roark, chief clinical officer at Sage Dental, which has more than 140 locations across the Southeast.

"We want to use evidence-based science to diagnose and treat accurately," said Dr. Roark. "We can now use AI to help identify early lesions on teeth or lesions you might not even be able to see with the naked eye and treat them before they worsen. That's in the best interest of the patient."

Examples of clinical standardization at Sage Dental:

- ✓ **AI-driven imaging:** Using AI to annotate X-rays helps identify areas of concern and can lead to more consistent diagnoses.

- ✓ **Digital impressions:** Replacing traditional "putty" impressions with intraoral scanners improves the process.

- ✓ **3D printing:** SprintRay Midas 3D printers produce same-day restorations, saving patients multiple visits.

"You can't have a cottage industry where you do something just because that's the way you've always done it," explained Dr. Roark. "**Patients need to trust us.** Standardizing clinical protocols just takes the proven scientific findings and makes them repeatable."

Overcoming dentists' concerns about standardization

Dr. Roark explains that Sage Dental's success depends on continuous learning.

"Standardization is a process that requires training, then retraining, then measuring and reporting usage and success," she said. "It's like a figure eight, a continuous learning loop until standardization is achieved."

During Dr. Roark's career, she has mentored hundreds of dentists and learned they often need to see proof before they are ready to adopt new processes.

"When I introduced scanners for digital impressions, many doctors wanted no part of it," said Dr. Roark. "They said they didn't need it and that it would take too long to get the impression. So, we trained their dental assistants and proved that it's faster and easier to take a digital impression than the old-fashioned soft, putty-like material."

"Not only are they now saving time taking the impression," she added, "but it's transmitted with the click of a button to the lab. There's no more packing it up and mailing it to the lab. That means patients can get treatment faster than ever before."

"The secret to standardizing anything is that you need to be able to show how it's going to be better than what they were doing before," Dr. Roark said.

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Chief Clinical Officer
Sage Dental

3 LEVERAGE TECHNOLOGY FOR SEAMLESS INTEGRATION

Technology is the backbone of standardization. The right systems enable data consistency, integration, and scalability.

Key tech investments:

- ✓ **Practice management system (PMS):** One PMS, such as Denticon or Cloud 9, ensures unified workflows and accurate data.

- ✓ **Integrated APIs:** These allow different software applications to securely share information, eliminating data silos and system fragmentation.

- ✓ **AI & automation:** These tools manual work in billing, scheduling, analytics, patient communication, and more areas.

Southern Orthodontic Partners

Southern Orthodontic Partners, a group with 120 affiliated locations, once operated with eight different PMS platforms.

CIO Barry Turney helped lead the company's transformation to Cloud 9 for practice management with these guiding principles:

1. **Consistency:** One source of truth for business and clinical data

2. **Simplicity:** Reduced maintenance and IT overhead

3. **Scalability:** Infrastructure that supports future growth

"Reducing the number of practice management systems enabled consistent data collection for effective business management," said Turney. "Simplifying our technology minimized maintenance and security overhead. Finally, we needed a scalable platform that could grow with us and support additional tools to enhance partner and team efficiency."

4 DEFINE KEY PERFORMANCE INDICATORS (KPIS)

Measuring the success of standardization requires clear metrics.

Common KPIs include:

- ✓ **Financial:** Collection rate, days in accounts receivable (A/R), and insurance denial percentage

- ✓ **Operational:** Scheduling efficiency, no-show rate, and turnaround times

- ✓ **Clinical:** Case acceptance rates, treatment completion, and hygiene recall compliance

- ✓ **Patient Experience:** Net promoter score (NPS), online reviews, and repeat visit rate
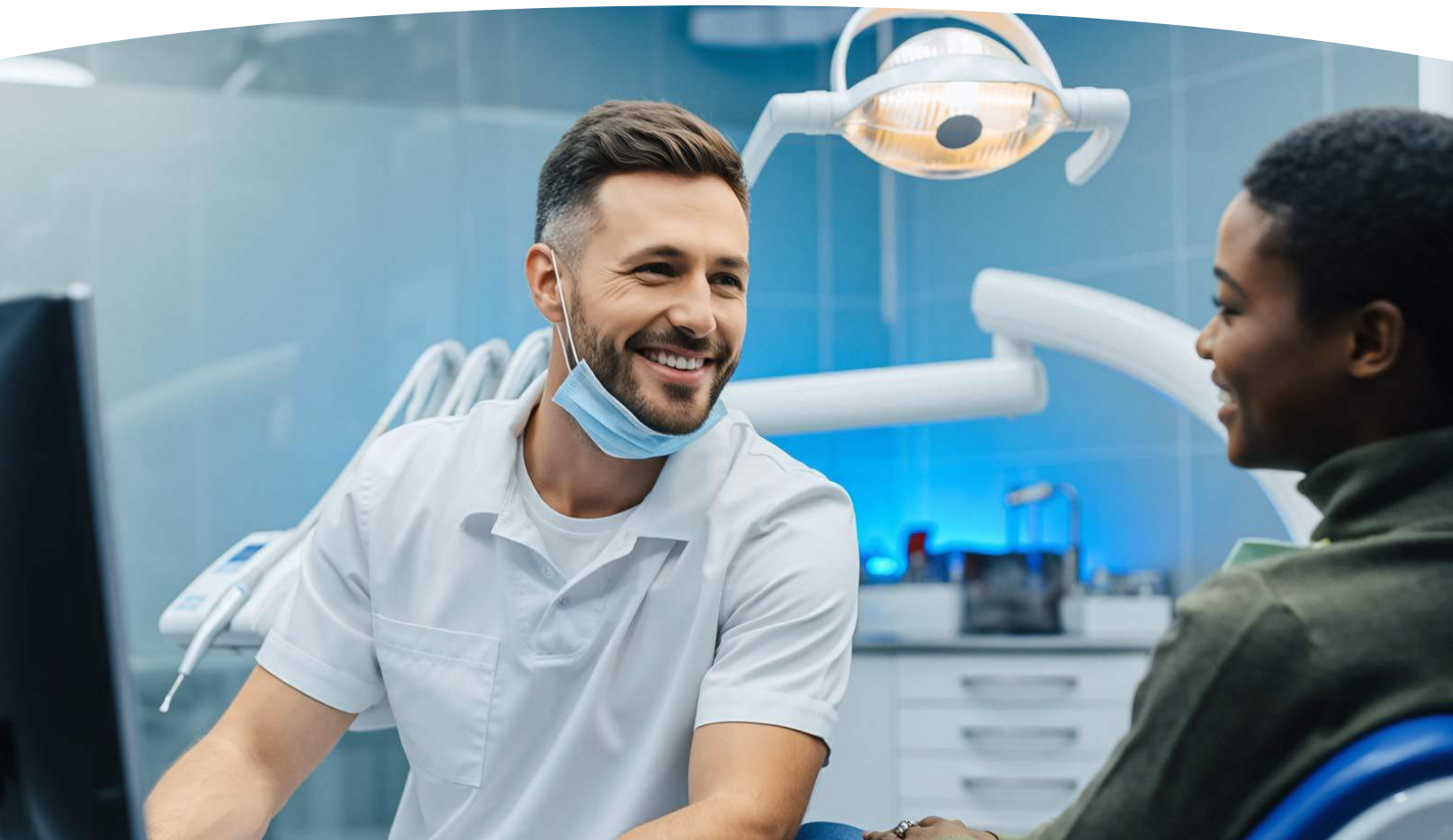
5 BALANCE STANDARDIZATION WITH LOCAL AUTONOMY

Over-standardization can stifle innovation and alienate clinicians. The best-performing DSOs and dental groups find the balance between consistency and flexibility.

How to strike that balance:

- ✔ **Regional adaptation:** Allow marketing and community engagement to reflect local demographics.

- ✔ **Clinical choice within guidelines:** Use a formulary that lets providers select from approved materials or labs.

- ✔ **Feedback loops:** Collect input from clinicians and staff to improve processes over time.

Josh Gwinn from Optimize Practice Alliance advises: "Have a game plan for how you're going to prepare the clinicians and the team and get their buy-in. Determine what needs to be standardized and what they can still retain autonomy over."

6 LEAD THROUGH CHANGE

Rolling out new systems and workflows requires thoughtful change management.

"Identify a project manager with the ability to hold teams accountable, on time, on target, and who has incredible communication skills," said Gwinn. "When you're rolling out standards and procedures, the communication is just as important as the protocols you're putting into place."

Best practices for staff buy-in:

- ✓ **Communicate the "why":** Explain how standardization benefits both patients and staff.

- ✓ **Comprehensive training:** Use live demos, shadowing, and refresher sessions.

- ✓ **Recognize compliance:** Celebrate teams that adopt and excel under new systems.

- ✓ **Empower champions:** Engage early adopters to lead by example and mentor peers.

The ROI on Standardizing Workflows

When DSOs and dental groups achieve standardization, the results are measurable—and attractive to investors.

"When you standardize your process and create a repeatable system, it's a game-changer," Gwinn emphasized. "That level of predictability is exactly what private equity investors are looking for. I've seen it increase EBITDA by two to three times."

The measurable ROI of standardization:

- ✓ Reduced overhead through economies of scale
- ✓ Predictable cost structures and higher profitability
- ✓ Stronger valuations in mergers or recapitalizations
- ✓ Happier patients, lower turnover, and a more cohesive brand

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Building a Foundation for Long-Term Growth

For DSOs and dental groups, standardization is more than a management tool; it's a growth philosophy.

It aligns teams, strengthens culture, and ensures that every patient receives the same great experience, no matter where they go.

Successful standardization:

- ✓ Starts with mapping both patient and financial journeys

- ✓ Centralizes key business functions to drive efficiency

- ✓ Leverages technology to unify data and streamline workflows

- ✓ Establishes measurable KPIs for accountability

- ✓ Balances consistency with clinician autonomy

- ✓ Relies on communication, training, and leadership buy-in

Together, these efforts can strengthen the way your organization operates and support steady, reliable growth.

Discover how we can help your DSO or dental group grow.

BOOK A DEMO

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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™ with AI, 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.

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