

BEYOND PRACTICE MANAGEMENT

The Era of the Dental Enterprise

The dental industry has entered a new era.
The software that runs it needs to catch up.



 planet
DDS

A New Dental Era Has Arrived

For the last decade, the story in dental was consolidation. Private equity capital assembled practices into groups, groups into dental support organizations (DSOs), and DSOs into regional and national platforms. An estimated 150 to 300 DSOs now hold 20 to 25 percent of all dental offices in the country. The top 20 groups alone nearly doubled their location count in under a decade.

That era produced extraordinary scale. It did not produce the infrastructure to run it.

Organizations managing dozens of locations—sometimes hundreds—with the scale to demand better operations and the ambition to build something lasting now face a harder question.

The State of Consolidation



~22%

150-300

DSOs now control an estimated **20-25%** of all dental offices in the country



Nearly 2x

location growth among the **top 20 groups** in under a decade



How do we actually operate what we have built?

The acquisition phase rewarded speed. The era now beginning rewards something different: operational discipline, data visibility, and the ability to drive consistent performance across every location in a portfolio.

This is the **era of the dental enterprise**—a structural shift in what it takes to compete, grow, and create value in dental. Groups that recognize this moment and make the right infrastructure decision now are the ones that will define what dental looks like in 2030. The organizations still running on the infrastructure of the last era are carrying a cost that compounds every month they wait.

It was never luck or prophecy. Our customers knew, and we had the conviction to listen. DentalOS® is our answer to the dental enterprise era.



ERIC GIESECKE
Chief Executive Officer
Planet DDS

"Every bet we've made as a company, we made early and often alone," said Eric Giesecke, Chief Executive Officer at Planet DDS. "Cloud-native before it was obvious, open ecosystem to give our customers choices, and enterprise-grade before DSOs were a mainstream conversation. It was never luck or prophecy. Our customers knew, and we had the conviction to listen. DentalOS® is our answer to the dental enterprise era."



What's Driving the Shift

Our customers described practice management problems in practice management language because that was the only language available. We heard something else—symptoms of three forces reshaping the entire industry:

1. The performance imperative

Capital partners are no longer evaluating how many locations a group can add. They are evaluating how much performance a group can drive from the locations it already has. Same-store growth is the new scoreboard. It requires operational infrastructure, not more acquisitions.

2. AI has arrived—and the data layer determines everything

Every major AI capability entering dental—scheduling, documentation, revenue cycle, imaging—requires clean, connected, enterprise-wide data to deliver real value. Groups on a unified platform get dramatically more from every AI investment. Groups on fragmented stacks get a fraction of that value. The gap widens every year, and it cannot be closed by moving later.

3. Labor pressure is structural

An estimated 70 to 90 percent of dental offices say they cannot fill clinical roles. You cannot hire your way to performance. The platform you run on increasingly determines how quickly you can automate the work that should never have required a human—and how much time your clinical teams spend with patients versus fighting software.

The Industry Changed. The Software Didn't.

Most operators today are running enterprises assembled one acquisition at a time. A different system at each location. Imaging that doesn't share data with the clinical record. Revenue cycle managed in spreadsheets.

Practice management software was built to manage a single practice. You're not managing a practice; you're running an enterprise. And the gap between what operators are trying to build and the tools they have to build it with gets wider every quarter.

We know, because our customers told us.

Most dental enterprises are managing 2026 ambitions on 2010 infrastructure. That gap has a cost. We call it process debt. And like all debt, it compounds—quietly, until it doesn't.

ERIC GIESECKE

Chief Executive Officer
Planet DDS



The infrastructure problem

Their tools were built for a practice. They're running an enterprise.



I can't do insurance verification at scale for an enterprise. It's bubble gum and band-aids.



The more we can eliminate having to add on other tech stacks, the better. It's much easier to train on a system that's all embedded into one—but that's the world we've had to live in.



We can't accept a solution that creates separate reporting silos.

The visibility problem

They can't see the enterprise they're actually running.



Operating multiple systems complicates cross-practice reporting and clarity.



Reporting capabilities are insufficient for groups. It's just not built for multi-practice organizations.

The scale problem

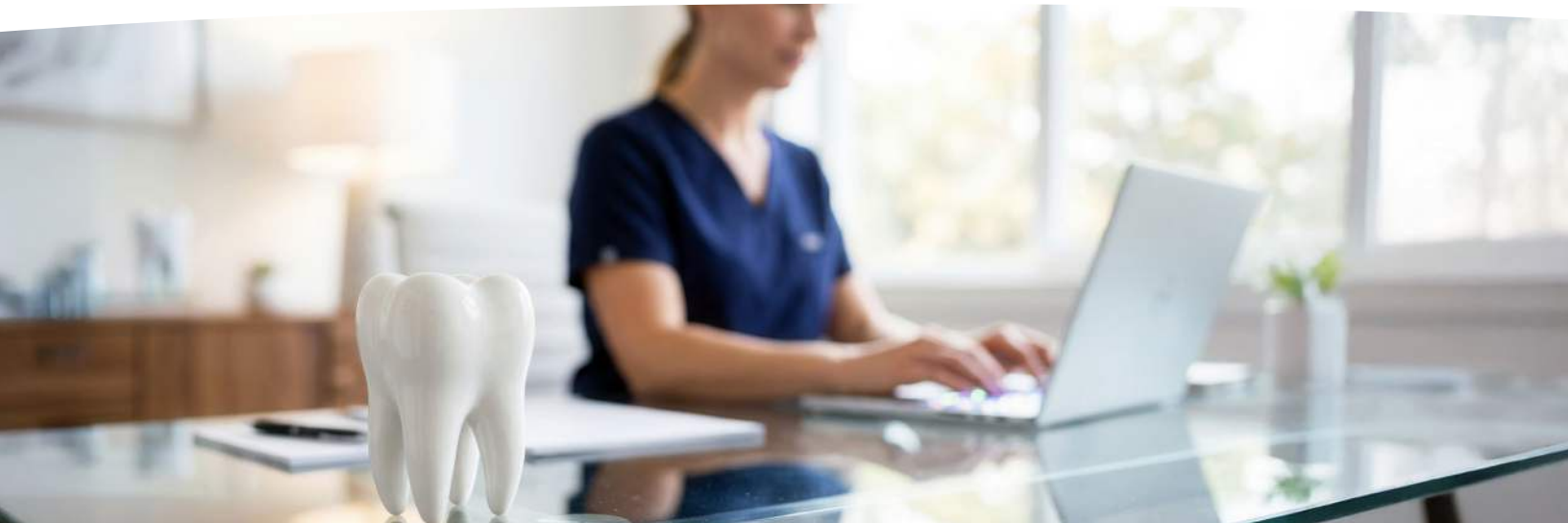
What worked at five locations is breaking at twenty-five.



Other solutions got the job done when we were small.



We are really trying to consolidate the number of individuals and vendors attached to our current systems.



The Answer Isn't a Better Practice Management Solution

We're declaring the new category. It's the dental enterprise platform.

Not a smarter revenue cycle management tool. Not an all-in-one suite that holds customers to a single vendor's tools under one invoice. A fundamentally different type of software built to run a dental enterprise, not just manage a practice.

The difference matters. Practice management assumes you are managing discrete locations. An enterprise platform assumes you are operating a connected organization—where every dollar, every patient relationship, every clinical outcome, and every operational decision compounds across every location you run.

The organizations still running on the infrastructure of the last era are carrying a cost that compounds every month they wait.

"Every capability we're building—AI agents, clinical voice, predictive revenue cycle—performs relative to the quality of the data beneath it," said Nathan James, Chief Product Officer at Planet DDS. "DentalOS is that foundational platform. We built the platform so that everything built on it today and in the future performs at a level disconnected tools never could."



More than half
of the largest 60 DSOs
in North America
trust Planet DDS.

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NATHAN JAMES

Chief Product Officer, Planet DDS



Built for This Era. Not Adapted to It.

Planet DDS didn't arrive at this moment by accident. We arrived through twenty years of paying close attention to where our customers were going—and making bets that weren't always obvious at the time.



Cloud-native since 2003

Not migrated to cloud. Not cloud-hosted. Built from the ground up for multi-location dental organizations. Twenty-three years of solving the problems that only appear at scale—multi-location reporting, centralized billing, and security governance across hundreds of locations. That cannot be replicated on a shorter timeline.



Enterprise-grade. Enterprise-proven.

More than half of the largest 60 DSOs in North America trust Planet DDS. When you're running multi-location, multi-specialty, or dozens of locations, you need a platform that was actually built for that complexity. Enterprise credibility takes years to build.



Open by design

More than 80 integration partners. Open APIs. Your future isn't held hostage to our roadmap. All-in-one means someone else decides what you can build. Open by design means your ecosystem grows on your terms—now and as the industry evolves.



AI-native, not AI-added

AI is only as good as the data it runs on. Because we built on a clean, connected data layer from the beginning, every AI capability in our platform runs on your real enterprise data—not an approximation. Every year on the platform, that data compounds into an asset you own.

An Era Defined by Intent, Not Size

The window is open. But it won't be forever. The organizations that will define the next decade of dental are not necessarily the biggest ones today. A group at fifteen locations on the right platform will be better positioned at 150 than one that waits.

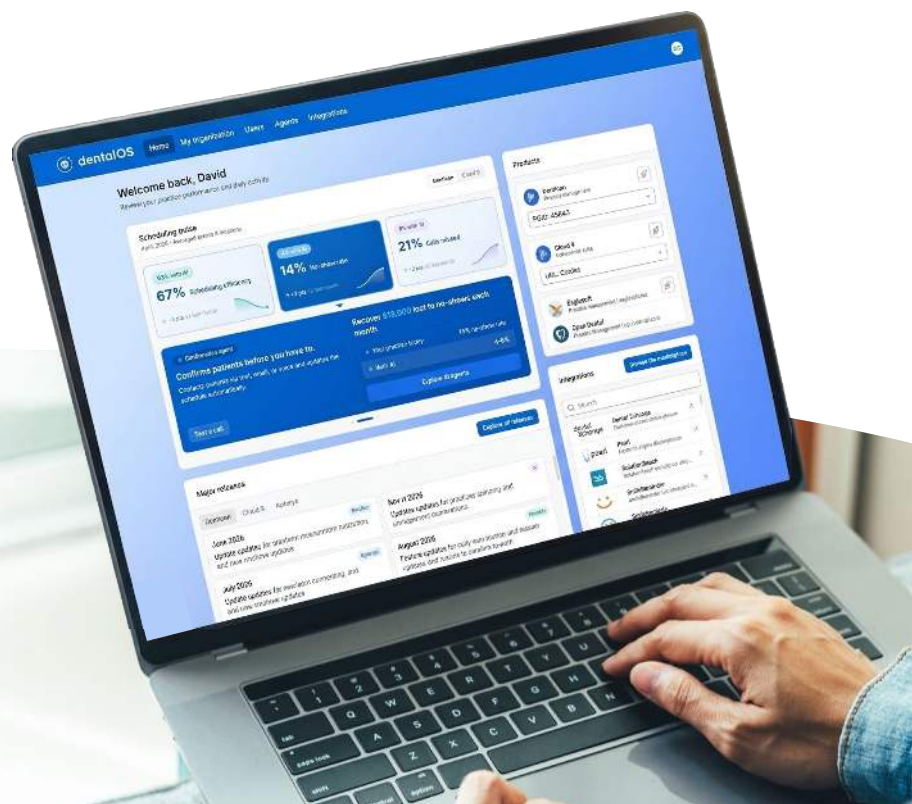
The groups making the platform decision now are not just buying software. They are building a compounding advantage in operational performance, AI capability, and enterprise value. Every month on the right platform, that advantage grows.

The compounding advantage of clean data, connected operations, and a platform that grows with you does not require scale to begin. It requires intention.

I've never met a DSO leader who said their biggest problem was finding the right practice management software. They talk about visibility, scale, AI, and operational consistency across dozens of locations. They're looking for a platform that matches the ambition of what they've built.

MIKE HUFFAKER

Chief Revenue Officer, Planet DDS



DentalOS is the dental enterprise platform built to manage DSOs and groups.

The Numbers Speak for Themselves

The industry has moved. And so has Planet DDS.



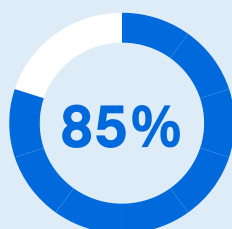
8,400+

Practice management
locations on platform

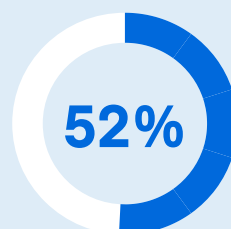


14,500+

Total locations
including imaging



85% of PMS locations
DSO or multi-location



52% of the top 50 DSOs
running on Planet DDS



80+
Integration partners
in the open ecosystem



\$187B

U.S. dental market
growing ~3% annually

There's Only One Platform Built for the Dental Enterprise

When Henry Ford introduced the Model T, it didn't compete with better carriages. It made the question irrelevant. The question wasn't which carriage to buy—it was whether you had a car. We are at that moment in dental.

We are the only platform in dental that is both open by design and enterprise proven. We are one of one in this category, with the deep responsibility that comes with it.

We have been on a mission to fix what is broken in dental software. Fixing it no longer means incremental improvements to practice management. It means building the category the industry actually needs.

DentalOS is our answer. We built it because you needed it. And we're just getting started.



Learn how DentalOS can help your organization scale and grow in this new enterprise era.

SCHEDULE A DEMO





denticon | apteryx | cloud 9

Dental software is broken. We aim to fix it.

As a partner in growth for DSOs and dental groups outgrowing legacy systems and fragmented tools, Planet DDS delivers a cloud-based AI platform designed to scale alongside growing organizations. Powered by DentalOS® with AI, Planet DDS is built on connection—connecting people, partners, and technology across an open ecosystem that includes Denticon Practice Management, Cloud 9 Ortho Practice Management, and Apteryx Cloud Imaging. Trusted by leading DSOs and emerging dental groups nationwide, Planet DDS supports more 100+ location DSOs than any other cloud-based dental practice management provider, enabling 14,500 practices and 175,000 users to move beyond outdated legacy software with seamless integrations, optimized workflows, and scalable technology built for growth.

To learn more, please visit PlanetDDS.com