

# Cybersecurity: Preventing the Worst-Case Scenario

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**Henrique Martins**

Is it Safe to Exchange Data? The Need for Integrated Hospital/Healthcare Organisation Interoperability and Cyber- and Information Security Plans

**Vito Petrarolo, Giovanni Maglio**

Cybersecurity: Preventing the Worst-Case Scenario

**Alexios Antoniou**

Internet of Medical Things: Threats and Recommendations

**Elisabetta Schiavone, Alessandra Sorrentino, Lara Merighi, Elena Ruiz de la Torre, Giorgio Sandrini**

How to Create a Migraine-Friendly Workplace

**Dan Brown, Tim Hill, Jarius Jackson**

Challenges, Strategies and Recommendations to Improve Cybersecurity

**Rowland Illing**

Unlocking the Power of Data to Transform Patient Care





# Stability in the Face of Change

Joerg Aumueller | Vice President and Global Head of Enterprise Solutions | Straumann Group

An interview with Joerge Aumueller providing an overview of the changes in the dental industry giving rise to dental service organisations and the challenges they face in fulfilling the promise of consolidation, creating a greater end-to-end experience for patients and strengthening operations and efficiency.



## Key Points

- Dental service organisations (DSOs) can lead the way in dentistry’s transformation as a technologically advanced field.
- DSOs are ideally suited to capture the benefits of the dental industry’s consolidation and growth.
- DSOs need to ensure standardisation in the quality of care, build meaningful relationships with patients and consumers, enhance reputation and brand recognition, and increase efficiency.
- The key challenges for DSOs are integrating technologies to deliver a high-quality, end-to-end patient experience, creating a supportive clinician environment and ensuring cost-effective business operations.

## Opportunities for Growth

Dental service organisations (DSOs) are facing unique challenges. These include operational inefficiencies, lack of standardisation, and a shortage of qualified dental staff. This is mainly an outcome of being built from the ground up and acquiring practices with differing philosophies, systems, and protocols.

There is a need for DSOs to discover ways of ensuring standardisation in the quality of care, building meaningful relationships with patients and consumers, enhancing reputation and brand recognition, and increasing efficiency within highly fragmented workflows and diverse infrastructures. Today, patients are digitally empowered and better informed and have become a catalyst of rising healthcare consumerism and an increase in demand for personalised treatment.

End-to-end oral health enablement can be the pathway to improve patient experience and outcomes. The Straumann Group understands these needs and can become a long-term partner to help unlock the potential of oral health through the following measures:

- Activating growth potential by generating additional consumer demand across specialties and mining for high-value treatment opportunities.
- Sustaining clinical excellence by ensuring high treatment quality and reduced variability in care delivery.
- Improving operational efficiency by increasing case efficiency and throughput and optimising workflows.

There has never been a more important time for DSOs to transform business operations by finding efficiencies across the patient pathway, enhancing technology, activating patients, and establishing clear and harmonised standards of care.

## Transforming the Dental Industry

The dental industry today is consolidating as clinicians seek relief from pressures ranging from dental school debt, business headaches and rapid technological change. According to a report from the American Dental Association (ADA), independent practices in the U.S. have dropped from nearly 85% of dentists in 2005 to 73% in 2021. Solo practices have declined even further, to just over 46% of dentists. As standards of living rise and more consumers are able to access quality care, the U.S. and global dental services markets are expected to grow at an average of 6.4% per year, reaching more than \$550 billion by 2028 (Grandview Research 2021).

DSOs are ideally suited to capture the full benefits of the industry’s consolidation and growth. They can serve and support dental practices, offer back-office business management, access to laboratories, marketing, hiring of support staff, professional training, and more. DSOs represent about 10.4% of U.S. dentists as of 2019—the most recent available ADA estimates (American Dental Association Health Policy Institute 2020) but are expected to grow almost 100% from 2018 to 2025 and triple their market share by 2035.



DSOs can lead the way in dentistry's transformation as a technologically advanced field serving more consumers than ever before and ensuring high-quality standards and affordable dental care. However, this will be challenging to achieve.

to schedule their appointments. As consumers become more informed and selective, dentists have to become more professional and service-oriented. Dental practices need to have a range of disciplines, from paediatric dentists to implant

## The influence of DSOs will continue to grow as the global dental market expands, complexities of running a dental practice escalate, and use of advanced technologies becomes standard practice

Despite consolidation, the dental industry still remains highly fragmented - from the technologies for specific procedures to the business processes that general dentists, specialists, and laboratories use to interact and exchange information.

The two key challenges facing DSOs include ensuring standardisation and quality of care and integrating clinicians with different levels of experience and at different stages of their careers. DSOs must also build greater patient trust, activate leads, maintain efficient communication and production schedules with labs, and increase workflow productivity. In addition, dental practices need to educate patients on the most appropriate treatment options.

### DSO Value Proposition

With an ageing population and an increase in demand for tooth replacement, the global implant market is expected to grow to \$6.7 billion by 2026, up from \$4.6 billion in 2019 (Research and Markets 2021). Cosmetic dentistry, including implants, prosthetics, teeth whitening, and other treatments, is expected to grow globally by 7.9% per year to more than \$41 billion by 2028 (Research Dive 2021). These trends are encouraging for the industry and are likely to benefit all dentists, whether it is a solo practice, group practice, or a DSO-affiliated practice.

Many dentists, particularly younger ones, find value in the DSO model. DSOs offer stable income compared with the uncertainties of building a practice—some DSOs even help pay off loans. According to recent figures from ADA, dentists 34 and younger are four times as likely as dentists in their 50s and early 60s to join DSOs. DSOs enjoy economies of scale in purchasing equipment and supplies, and their financial resources can help during uncertain times.

### Serving Consumers Across their Journey

Consumers today are better educated and more selective about treatments and clinicians. For DSOs, the challenge is not limited to attracting new patients but also retaining them. For example, software investments can make a big difference in the customer experience, such as apps allowing patients

specialists. Offering multiple services under one roof can attract multigenerational families, increase the chances of keeping a patient for life, and promote patient loyalty. DSOs also need to connect with consumers at an emotional and intellectual level. This can help patients open up about their conditions and their needs.

### Digital Transformation of Dentistry

New technologies are reshaping how dentists treat patients. For example, in recent years the growing adoption of digital intraoral scanners and handheld devices offer the ability to obtain accurate, real-time images of a patient's mouth. Similarly, cone-beam computed tomography or CBCT can take multiple images from different angles and create a 3D image of a patient's teeth, jaw, and neck. There is also technology that can digitise patient records. The next iteration of dental technology will be artificial intelligence (AI). In future, AI will play a greater role in the early diagnosis and prevention of oral cancer and other diseases.

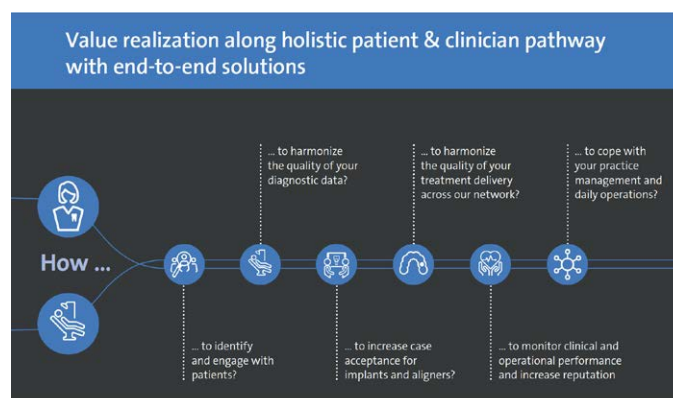


Figure 1: Value realisation along holistic patient and clinician pathway with end-to-end solutions

### Clinician-Based Culture

DSOs must use their size and financial resources to lead the way as quality care providers. This will include prioritising



clinicians and patient care, focusing on transparency, and involving clinicians directly at the highest levels of decision-making. Clinicians should be encouraged to learn best practices from one another and harmonise and elevate the quality of care. In addition, they should be directly involved in a DSO's key decisions. Clinicians have frontline experience treating patients and can bring valuable perspectives on elevating treatment quality and the patient experience.

### Conclusion

Successful companies empower dentists to grow and develop

with the organisation. Every organisation has its own culture. The influence of DSOs will continue to grow in the years to come as the global dental market expands, the complexities of running a dental practice escalate, and the use of advanced technologies becomes standard practice. With their financial resources and national to international reach, DSOs are well-positioned to support clinicians, serve consumer needs, and define the future of oral health. Organisations that grow with purpose, help clinicians, do the work they love, and earn the loyalty and trust of consumers will be the ones that truly cement the DSO model. ■

## Does your DSO offer these benefits to patients?

- **A seamless patient path from problem to solution in an all-in-one treatment model.** You are able to cover the expectations of different patient groups and actively create and test new care options.
- **Strong trust-based patient-provider relationships.** You develop long-term relationships with the patients that are based on trust and loyalty. In addition to clinical competency, care providers demonstrate people skills that allow them to form bonds with patients.
- **Holistic care and best-in-class experience.** You deliver high-quality treatment and preventive care every day and the patient is engaged in every stage of their care.
- **A healthy smile as a 365-day experience.** Patients sense that their oral healthcare provider cares about helping them prevent disease and enjoy optimal oral health at all times.
- **A revolutionary new experience enhanced by digital technologies.** You guarantee flexibility and care collaboration through online services and top-level visit organizations.
- **24/7 care with advanced digital support for customers.** Patients feel confident that they can contact their affiliated dental practice from the moment an oral health concern arises.

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