

SPRING 2021

Smiling

A Heartland Dental
Publication

GROWTH AMID A PANDEMIC

Points to Future Success





Smiling Magazine

Spring 2021

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To support dentists and their teams as they deliver the highest quality dental care and experiences to the communities they serve while providing exceptional careers and creating value for our stakeholders.

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Support Office Locations

Heartland Dental is the nation's largest dental support organization providing non-clinical, administrative support services. What started from the entrepreneurial spirit of Rick Workman, DMD, with his single dental practice, has evolved into supporting over 1,800 dentists in more than 1,150 dental offices across 38 states. Heartland Dental supports doctors as they deliver high-quality care across a spectrum of dental services and is majority owned by KKR, a leading global investment firm. For additional information on Heartland Dental and practice affiliation, call (877) 903-6327, or visit Heartland.com. Follow Heartland Dental on LinkedIn, Facebook, Twitter, and Instagram.

From the **HEART**

A Message from Justin Wendling

Vice President of Affiliations, Heartland Dental

Welcome

The word, "unprecedented", has commonly been used to describe the occurrences in 2020 when COVID abruptly changed life as we knew it, which included bringing dentistry to a near standstill for many weeks. The teams within Heartland Dental acted quickly and resourcefully to continue providing world-class support and guidance to supported doctors so they could safely lead their teams back to full-time patient care.

During this time, the word "unprecedented" took on a different meaning for our Practice Transition Representatives who were inundated by the large number of practice owners interested in learning more about how the nation's largest dental support organization could help to add value to their practices. As a result, when I now hear the word "unprecedented," I think of the record-breaking growth Heartland Dental experienced in achieving the largest single-year addition of affiliations.

Such growth was possible due to practice owners understanding the type of support we provide, finding confidence in our non-intrusive, transparent approach, and desiring a doctor-led philosophy where they continue to make clinical decisions for their patients and lead their teams. As a result, we're honored to have welcomed more than 150 affiliated doctors last year — all of whom we connected with to fully understand their unique needs and to customize a solution to help them meet their goals.

Similar to the fact that not all dentists have the same needs, not all DSOs are the same. So, if you're a practice owner looking to gain management relief, grow your practice, or plan your transition, I encourage you to consider Heartland Dental. It's truly an exciting time as the challenges of 2020 have no doubt been a catalyst for future growth opportunities in 2021 and beyond. We would love for you to be part of our continued success!

As you read this issue of Smiling, you'll learn about Dr. Rick Workman's 40-year impact on dentistry and why he founded Heartland Dental. You'll feel the real-life challenges that Pat Bauer, our President and CEO, faced during COVID as the Heartland team worked to ensure the safety and well-being of supported doctors and their teams. And, you'll also hear directly from supported doctors who were once in private practice. Through this glimpse into Heartland Dental, I hope you get a sense of our leaders' integrity, while better understanding the uniqueness of our supported doctors.

Here's to another great year of supporting doctors and their teams!

Justin Wendling



GROWTH Amid a Pandemic Points to Future Success

By sharing knowledge and insights with external doctors during difficult times, Heartland Dental makes valued connections to boost growth in 2021 and beyond.

After a robust start to 2020 for Heartland Dental and its supported doctors, things came to a screeching halt in mid-March. COVID shutdowns forced supported doctors across the country to quickly pivot from a full scope of patient care to treating only emergency patients.

Although supported doctors were limited in their time at their practices, the Heartland Dental teams were still working diligently behind the scenes to help stabilize office expenses, to source and vet PPE and other necessary supplies, to communicate with patients, to shift from in-person education and leadership training to virtual, and so much more — all while supported doctors continued building their clinical skills and preparing for re-openings.

Simply put, Heartland Dental supported doctors didn't have to face the risks and worries that their owner-doctor colleagues were dealing with because of the pandemic.

Providing Support to Those Outside of Heartland Dental

Understanding that many doctors outside of Heartland Dental were struggling with what to do and how to cope during COVID — and in the spirit of doing the right things for the right reasons — the company's leaders and many supported doctors began sharing their knowledge and experiences with those outside of Heartland Dental. They hoped to provide that sense of family which is highly valued by Heartland's supported doctors.

Through a series of webinars and virtual forums, the company connected with thousands of external doctors to provide resources and insights regarding safely reopening practices, non-clinical efficiencies, leadership lessons, and much more. By being open and transparent about their unique journey throughout the pandemic as well as the never-ending support they received, supported doctors helped external doctors truly experience the community and culture of Heartland Dental.

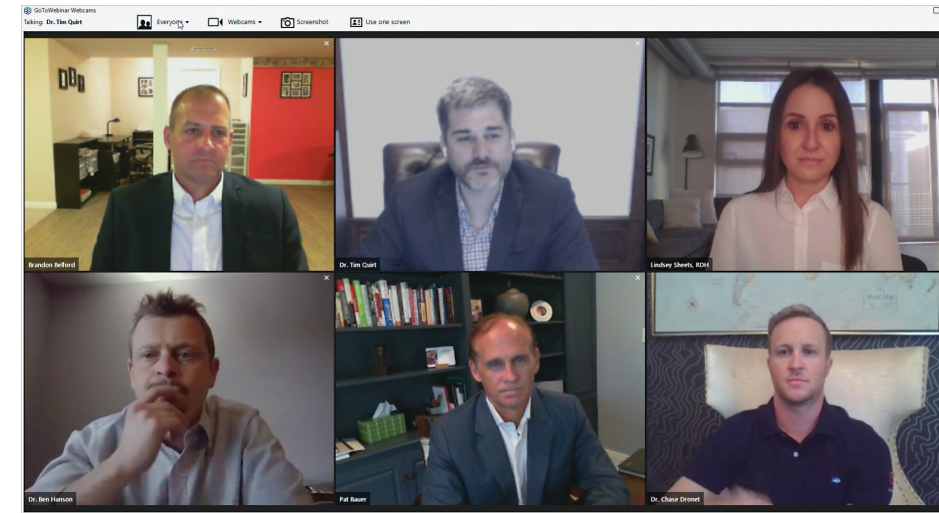
"We spoke with so many great clinicians who were operating

successful practices, yet they remained extremely vulnerable to the effects of the pandemic," said Justin Wendling, Vice President of Affiliations. "They saw profitability plummet, access to PPE and supplies become very limited, and were unsure of where to turn for guidance."

Many owner doctors shared that by attending the forums, they felt the incredible connection and encouraging atmosphere that Heartland Dental supported doctors have with one another. As a result, the organization received an unprecedented response from owner doctors interested in affiliating. "The thought of going through another situation similar to COVID accelerated practice owners to explore their options," added Wendling. "We listened and

"Our business model provides all supported doctors an opportunity to not only gain immediate relief from their everyday non-clinical administrative burdens, but also the ability to utilize our proven systems and processes so they can deliver exceptional oral care to their patients, and maximize their own clinical and economic growth now, and into the future."

Mark Greenstein, Heartland Dental EVP and Chief Growth Officer



Company leaders and supported doctors shared knowledge and experiences with those outside of Heartland Dental.

were able to create customized solutions to help them in reaching their goals for practice growth, relief of operational burdens, transition, and a healthier balance in life."

By year's end, Heartland Dental realized record-setting growth with affiliations, adding more than 150 supported practices — achieving 35% growth over its 2019 affiliations, with more than 40% growth in investment. The company welcomed doctors from 26 states while also expanding its network of support into Idaho, its 38th state.

Newly affiliated doctors joined Heartland's nationwide network of over 1,800 supported clinicians with whom they're able to share best practices and receive peer-to-peer encouragement and support. At the same time, they quickly realized the advantages that come along with Heartland Dental's growth in supported offices. "Our large scale translates to a greater ability to obtain the best clinical products at incredible prices for supported doctors," explained Mark Greenstein, EVP and Chief Growth Officer for Heartland Dental. "Plus, our dedicated payor relations team is continually working on the behalf of doctors."

Private practice owners weren't the only ones who discovered the benefits of affiliating with Heartland Dental in 2020. Part of the company's recent affiliation success also included newly supported doctors from three group practices, including

Tru Family Dental with 23 supported offices throughout Illinois and Michigan (see page 7 for full story); Mosaic Dental in Minneapolis, Minnesota, which added four newly supported offices; and Forum Dental in Missouri, which included six supported offices throughout the state.

"Our doctor-led culture and full-range of support positions us as the leading transition solution for successful dental practice owners and small groups," said Greenstein. "We're finding one of the biggest pain points for doctors and group owners is growing infrastructure to scale — namely day-to-day operational challenges such as talent acquisition, employee management, clinical



Heartland Dental expanded its support to more than 150 newly affiliated practices in 2020.

education offerings and marketing services. For over 20 years, Heartland Dental has invested in developing world-class capabilities in these areas and is the best option for dentists and sellers to realize the full value of their work while providing growth opportunities to their associates and teams."

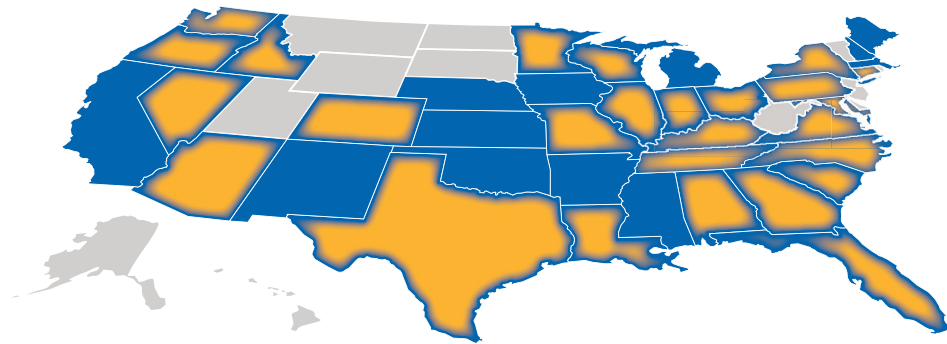
Single offices and groups affiliating with Heartland Dental have found immediate access to increased resources and support services as well as the nation's most comprehensive continuing education programs, leadership training opportunities, state-of-the-art equipment, best-in-class operational efficiencies, and superior benefits.

"Our business model provides all supported doctors an opportunity to not only gain immediate relief from their everyday non-clinical administrative burdens, but also the ability to utilize our proven systems and processes so they can deliver exceptional oral care to their patients, and maximize their own clinical and economic growth now, and into the future," added Greenstein.

1,800+
SUPPORTED
DOCTORS

35%
AFFILIATION
GROWTH

1,150+
OFFICES



Heartland Dental achieved 35% growth over 2019 affiliations and welcomed doctors from 26 states. The company also expanded its network of support into Idaho, its 38th state.

Challenges Lead to Opportunities

Although Heartland Dental faced several challenges in 2020, those challenges were certainly great opportunities to expand their support to more than 150 newly supported practices last year. Pat Bauer, the company's President and CEO, believes that practice

owners who lived through COVID sought Heartland's support so they wouldn't have to further endure the risks and worries of a solo practitioner.

"Practice owners didn't seek us out because they needed help with dentistry during a difficult time," said Bauer. "They're

"Practice owners didn't seek us out because they needed help with dentistry during a difficult time. They're already the best of the best clinicians. They came to us because with our support, they can have more time to treat their patients and serve their communities."

Pat Bauer, Heartland Dental President and CEO

already the best of the best clinicians. They came to us because with our support, they can have more time to treat their patients and serve their communities."

Fueled by the surge of interest from owner doctors during the pandemic, the

leadership team within Heartland Dental plans to build on the company's 20+ year record of advancing its single-office affiliation growth, with more than 100 potential affiliations already in the pipeline for 2021. The plan includes a greater regional focus as Heartland Dental has increased its team of Practice Transition Representatives and more than doubled its targeted areas of growth for 2021. In doing so, the team continues working to more intimately understand the unique needs of these regions.

"It's been a privilege to welcome newly supported doctors this past year, and we're laying the groundwork in confidence that we'll be supporting hundreds more by the end of 2021," added Bauer. When asked how he and his teams have successfully supported more than 1,100 offices, Bauer responded: "The key to our success has always been our ability to support one office extremely well, and our consistent growth year over year is largely due to our scalability."

In addition to the company's accelerated growth plan for single office affiliations, Heartland Dental is also working to expand on its recent success in affiliating with group practices and regional DSOs. By actively engaging with brokers, investment bankers, and financial advisors to explore transition strategies for their dental clients and their investments, Heartland Dental is focused on adding even more small groups by year's end.

While it's easy for most companies to put together a strong plan for growth, many often fail to have a proven infrastructure in place to support such rapid growth. Bauer believes however that Heartland Dental is well poised for additional growth into 2021 and beyond. "We've got both the plan and the infrastructure to continue successfully scaling our support to dentists," said Bauer. "The fact that we're very well capitalized will help to ensure our plan becomes reality."



Tru Family Dental — Regional DSO with 23 Supported Offices Across Illinois and Michigan — Joined Heartland Dental Late in 2020

To round out its incredible year of growth despite the global pandemic, Heartland Dental finalized the affiliation of Tru Family Dental, the Southfield, Michigan-based regional dental support organization, with an all-cash transaction just before the close of 2020.

From its inception in 2014, Tru Family Dental had achieved incredible milestone growth while supporting its doctors as they provided exceptional oral health care to their patients. That growth, coupled with Tru's similar doctor-led and patient-focused philosophy, was well-aligned with what Heartland Dental looks for in a potential affiliation.

The founders of Tru Family Dental, Namish Patel and Brandon Halcott, were already acquaintances with Heartland Dental Founder and Executive Chairman, Dr. Rick Workman, and with Pat Bauer, President and CEO. When the pair was new to the dental space, they had sought advice regarding Heartland Dental's continuing education programs as well as its systems and processes, and even emulated some of Heartland's best practices to help their supported practices grow.

"Being new to dentistry, we built a great rapport over the years with the Heartland Dental leadership team to learn from them. Their commitment to clinical autonomy and doctor leadership is aligned with ours," said Patel. "By affiliating, supported doctors can now take advantage of Heartland Dental resources, which would have taken us years or even decades to perfect on our own," added Halcott.

"Heartland Dental proved to be a great fit for Tru Family Dental, and our organizations are well-aligned for mutual success," said Bauer. "Together, we will continue to build and strengthen Tru's infrastructure while using Heartland Dental's proven systems and processes to best support these great doctors and their teams in delivering their communities the highest quality dental care and experiences."

Heartland Dental's world-class support includes benefits such as real-time access to a nationwide network of over 1,800 Heartland supported clinicians, scale to obtain the best clinical products at the best prices, a dedicated payor relations team working on the behalf of doctors to navigate the payor landscape, world-class operational support, and a patient marketing team to help supported doctors efficiently and effectively source and communicate with their patients.

"The integration with Tru Family Dental has gone very well in just a short period of time," said Mark Greenstein, EVP and Chief Growth Officer for Heartland Dental. "Our HR, benefits, and IT teams have already completed a bulk of the integration, and through the process, we have found exactly what we expected to find — a group of high-quality clinicians who are passionate about serving their communities."

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More Opportunities, Even in Challenging Times

Dr. Phillip Talley overcomes his doubt and chooses to grow his practice with support from Heartland Dental.

Growing a practice alone can be difficult in some markets; trying to do so amid a pandemic was an exceptional challenge for many. For **Phillip Talley, DDS**, from Peachtree Corners, Georgia, his decision to be supported by Heartland Dental came in the unlikeliest of times.

Dr. Talley had been in private practice for more than 20 years when he first heard about Heartland Dental from his former hygienist. "Five years ago, my lead hygienist moved to a Heartland Dental supported practice that was closer to her home," Dr. Talley recounts.

"We kept in touch. She often talked about Heartland and made it clear that she was loving life there!"

Wanting to learn more about her excitement, Dr. Talley started

a conversation with a Heartland Dental representative. Previous experience with another Dental Support Organization (DSO) made him extra cautious about his approach: "When I got out of the Navy, I worked for a DSO for one year. During that time, I saw what I didn't want."

So, what did he want? His main objective was to keep his clinical autonomy. Dr. Talley hoped to grow his business while still practicing dentistry the way he felt was best for his patients. He was also particularly concerned for his team and their well-being.

"In evaluating various DSOs, I was already seeing a big difference in Heartland's systems and processes compared to other DSOs," explains Dr. Talley. And while doing his due diligence, the real epiphany came when COVID hit his community. "The pandemic forced me to furlough my team members, like many other offices. But I kept hearing from my hygienist friend and other dental professionals, how awesome Heartland was doing, and how they were really taking care of their supported doctors and teams. It was almost unbelievable."

Somewhat ironically, the reduced patient load during the pandemic gave Dr. Talley the time to speak with a number of supported doctors already affiliated with Heartland Dental. "I didn't just want to talk to the doctors referred to me by Heartland Dental's representative. I wanted to speak with a range of supported doctors — those who had been with Heartland for 5, 10, or even 13 years already," explains Dr. Talley. "And they were all eager to speak with me. It was so reassuring that even though each doctor had a different experience to relate, every single one of them had the same thing to say about their clinical autonomy. They all agreed that their practice had remained doctor led."

That enthusiasm and honesty is what won Dr. Talley over. "They didn't get anything out of telling me that Heartland was great... they were just telling me the truth, and everyone was saying the same thing. That was amazing for me."

As a result of hearing so many positive aspects about Heartland Dental, Dr. Talley affiliated in July of 2020.

After noting he has already found opportunities for cost savings on lab fees and supplies as a Heartland Dental supported doctor, Dr. Talley believes the biggest advantage of affiliating is actually the benefits package and career opportunities now available to his team members. "With Heartland's leverage as the largest DSO,


"With Heartland's leverage as the largest DSO, there's no way a private practice can compete with all the benefits for your team, and your practice."

Dr. Phillip Talley

there's no way a private practice can compete with all the benefits for your team, and your practice," explains Dr. Talley.

"Before affiliating, I had a 401k, and I had medical insurance that I was paying 50% for; but with the savings my team has seen

for medical insurance with Heartland, it was almost like they got a pay increase." Indeed, Heartland Dental helps Dr. Talley ensure that his team is "taken care of," with opportunities for training and career advancement that are only possible within an organization of Heartland's magnitude.

"To be the largest DSO in the U.S., they must be doing something right!" Dr. Talley says with a chuckle. "I only wish that I had talked with other supported dentists and started the process sooner." Dr. Talley now speaks to other dentists to help them overcome their own doubts about joining the Heartland Dental community. He wants to help Heartland grow, just as the organization is helping him to grow. 



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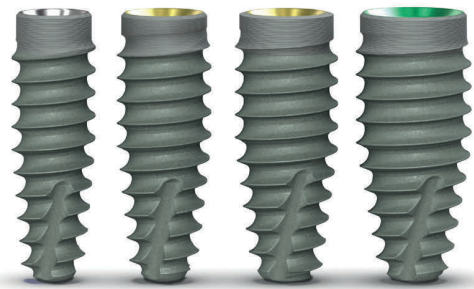
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Impacting the Dental Industry for 40 Years

Heartland Dental Founder and Executive Chairman, Dr. Rick Workman, commemorated 40 years in dentistry!

With a dental degree in hand, Rick Workman, DMD, opened his first dental practice on September 8, 1980. Unable to secure an associate position which would pay him \$25,000 per year, he instead found a former dental office in Effingham, IL to rent for \$325 per month. Dr. Workman spent weeks combing through catalogs to select needed supplies and equipment. His one employee, a dental assistant, worked 50 hours per week alongside him to figure out all the things necessary to run an office. The risks and challenges associated with owning a dental practice certainly caused him many headaches, but at the same time laid the groundwork for his intrinsic ability to understand the unique needs of dentists throughout all stages of their career.

What started from the entrepreneurial spirit of Dr. Workman with his single dental practice, has evolved into the nation's largest Dental Support Organization (DSO) with 12,000+ team members. Today, Heartland Dental provides world-class support to over 1,800 dentists in more than 1,150 dental offices across 38 states.

Humble Beginnings

The son of a farmer and a teacher, Dr. Workman credits his work ethic and pragmatic business approach to his rural farm upbringing in Ingraham, IL.

Dr. Workman attended a three-room grade school where his mother was his teacher. While working on the family farm taught him many life lessons — including to work hard and to be humble — it also taught him enough to know he didn't want to work on the farm for the rest of his life.

With an innate desire to help people, along with his interest in dentistry, Dr. Workman left his hometown and headed to dental school at Southern Illinois University School of Dental Medicine in Alton, IL. While a bit traumatized by his dental school experience, upon graduation, Dr. Workman felt that with hard work and his desire to get better each day, he could someday become successful.

Dr. Workman borrowed \$32,500 from his parents and grandparents to open his first office. His initial marketing approach was placing a \$15 hand-painted sign in the front yard of his practice. "Back then, good dentists didn't advertise," Workman chuckled. He quickly discovered his passion for treating his patients and serving his community, and just fifteen months after opening his first practice, Dr. Workman opened an additional



Dr. Workman opened his first dental practice in 1980.



From a small-town dentist with a mission to help dentists have a better work-life balance, Dr. Workman took his modest family loan and

built an extraordinary company that changed an industry forever. With the vision and heart of an entrepreneur, his values and leadership are making an impact nationwide and leaving a legacy for his family.



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MICRODENTAL LABORATORIES

“After years of spending 50+ hours a week with my patients and an additional 30 hours a week learning what was necessary to become a highly successful clinician, employer, and practice owner, I knew there had to be a better way to practice dentistry.”

Dr. Rick Workman

office, brought on associate doctors, and hired more team members. This experience would later prove beneficial to Dr. Workman's future in scaling his business model to best support doctors and their teams.

As his practice grew, so did the amount of time he'd have to devote to managing the business. “After years of spending 50+ hours a week with my patients and an additional 30 hours a week learning what was necessary to become a highly successful clinician,

employer, and practice owner, I knew there had to be a better way to practice dentistry,” said Workman. “Not just for me at that time, but for all future dentists in any phase of their career.” It was then that Dr. Workman's passion expanded to helping fellow dentists overcome the same work-life challenges that he experienced.

From that initial practice, Dr. Workman ultimately created four multi-office corporations totaling 25 offices. In 1997, he and 21 other partners sold three of those groups. From that point forward, all the growth and development was in that sole surviving group, known as Heartland Dental. Since that time, Dr. Workman has molded the company into a world-class DSO — and has positively changed the lives of thousands of doctors nationwide.

The Heartland Dental Difference

From the requirements of every team member to the concerns of running the business side of the practice — and everything in between — Dr. Workman's nearly 20 years as a practicing dentist led to his intimate understanding of a dentist's operational

and professional needs. He has continually instilled in his leadership team the importance of developing this understanding. This is what makes Heartland Dental different.

From the beginning, Dr. Workman knew that by taking the non-clinical administrative burdens off the backs of supported doctors, and building in world-class advantages that solo practitioners often can't imagine, they could then do what they do best — deliver the highest quality dental care and experiences to their patients. That management relief is realized through specialized support professionals who assist Heartland Dental supported doctors with human resources, contract negotiations, marketing, IT, supplies, insurance credentialing, accounting, and more.

He didn't just stop there, however. Dr. Workman made a commitment to helping dentists advance their clinical training while also offering training to expand their leadership skills. His belief — to build yourself and then build your team — is evident throughout Heartland Dental's renowned mentorship and continuing education opportunities.

“A dentist choosing the support of Heartland Dental starts day one with a team, state-of-the-art equipment, doctor-clinical mentorship, non-clinical support, and access to education. Likewise, many solo practitioners affiliated with Heartland Dental believe the value of our support to be life changing.”

Dr. Rick Workman

With such extensive training, dentists are able to earn 5 to 10 times the required amount of continuing education credits per year, giving them additional tools to provide the highest quality patient care.

“There were so many things I didn't learn in dental school that are essential to success, and I know that still holds true for today's students as well,” said Workman. As a result, he wanted to ensure supported doctors the ability to focus on leadership and communication skills within their practice and with their patients. “Of course they teach you the clinical side of treating your patients while in dental school, but never once did I learn about the realities of leadership, communication, and case acceptance for example,” Workman added.

Also of utmost importance to Dr. Workman when providing opportunities for supported doctors, is helping them build long-term financial stability by sharing in the profits of the company as a whole. He takes great pride in his early implementation of an ESOP. Today those accounts are worth over \$450M. This outcome has enabled many supported doctors and team members to achieve

significant financial stability for the first time in their family's history. In the same way, Dr. Workman and Heartland Dental later added a benefit not found within other dental support organizations — the ability to invest in the company they contribute to each and every day. “By taking an ownership mentality and participating in the stock purchasing program, our supported doctors help Heartland grow, which in turn allows them to build long-term financial security,” explained Dr. Workman. “I am confident that eventually most dentists will come to understand the true power of our total compensation plan.”

Advocating, Influencing, and Impacting

Highly regarded as an advocate for the dental industry and a voice for dentists, Dr. Workman's impact over the past 40 years has been far reaching.

Growing up in a non-affluent small town, he longed to provide communities with access to quality dental care so people could get the treatment they needed, desired, and deserved. All these years later, that's still at the core of everything Heartland Dental does to support doctors and teams.

As a long-time patient and doctor advocate, Dr. Workman has worked tirelessly over the course of his career to advance oral healthcare legislative measures and policies to ultimately protect patient care and doctors' rights to choose where and how they practice.

Dr. Workman has also dedicated much time and effort into debunking the myths associated with dental support organizations. “Many misunderstandings still remain regarding DSOs in general,” he said. This is evident not only outside of the dental industry, but among many solo practitioners as well. “Not all DSOs are the same. Heartland Dental is unique — just like the doctors and practices we support,” Workman added.

While his journey has been highly successful, it hasn't been without challenges. But Dr. Workman has always stayed the course and has turned those challenges into opportunities all along the way. “I've been swimming against the professional tide since graduating from dental school and was never one to settle for mediocrity or limit my opportunities — or those of my team,” Workman said.

Speaking of his team, one of the most valuable commodities at Heartland Dental is the culture within the organization, which exists because of Dr. Workman's personal mission to “do the right things for the right reasons.” From the beginning, he set an example and instilled in team members the desire to work together to accomplish goals, celebrate successes, and perform professionally in the face of adversity. In addition to helping define Heartland's vision and mission, Dr. Workman's influence regarding the company's core values prompts all supported doctors, company leaders, and office support members to strive for never-ending improvement, promote safe and supportive environments, adapt to change, and above all act with integrity.

Dr. Workman's impact in dentistry extends far beyond the support of dentists. He has been influential in creating value and opportunities for the thousands of Heartland Dental team members who provide non-clinical administrative support. Leadership positions — like those prevalent within Heartland — simply did not exist in the dental industry prior to Heartland Dental.

Spurred by Dr. Workman's service-minded philosophy and passion for making a difference, Heartland Dental and its supported doctors and teams truly value the importance of giving back to the communities in which they serve. In the last few years, supported offices across the country have collectively provided more than \$10M in free dental care through its



program *Free Dentistry Days*. In the same way, *The Heartland Dental Foundation Economic Hardship Fund* was created to assist Heartland Dental supported dentists, team members and support professionals facing economic hardships. The Foundation provides grants to qualified team members who are unable to afford housing, utilities, and other basic living needs because of catastrophic or extreme circumstances beyond their control. In their efforts to continue doing the right things for the right reasons, hundreds of employees within the supported network regularly contribute to the Foundation, which in its infancy has already provided over \$120,000 in grants to their colleagues in need.

Future Opportunities


There's still much work to be done within the dental industry, especially as the dental landscape continues to change. Dr. Workman plans to continue adding his voice as long as possible. He's always been focused on

providing real-world solutions to real-world problems.

"Without Heartland Dental, new dentists are not only saddled with student debt but also face massive loans to set up and staff a private practice," said Dr. Workman. "A dentist choosing the support of Heartland Dental starts day one with a team, state-of-the-art equipment, doctor-clinical mentorship, non-clinical support, and access to education. Likewise, many solo practitioners affiliated with Heartland Dental believe the value of our support to be life changing."

When talking about the future of dentistry and the future growth of Heartland Dental, Dr. Workman believes there's no limit to the company's growth, especially after coming out of this pandemic year having achieved a record number of affiliations. "Just as the scale and complexity of pharmacy and medical practice has led to more pharmacists and physicians working in supported facilities and healthcare networks, the

complexity and escalated expense of education and running a dental practice means that more dentists can benefit from our support. That's where Heartland Dental steps in," said Workman.

Reflecting on his journey, it's evident that he sincerely appreciates the opportunities he's been given over the past 40 years. "I'm grateful to all those who have helped me along the way," said Dr. Workman. "There's no doubt my parents uniquely prepared me for this journey, and the support from my wife, Angie, as I continue to work, grow, and learn, has been such a blessing." Dr. Workman said teamwork is the biggest factor in any accomplishment. "It's exciting that even after all these years, the possibilities for Heartland Dental are brighter than ever. If everyone continues to work hard, smart, and together, I believe there is no limit to our reach and our future successes." 



Dr. Workman and his family support many local charitable organizations and causes. This ribbon cutting ceremony marked the opening of the Workman Sports Complex in Effingham, IL, which bears his name.

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TIME for Patients, Team Members, and Family

Husband-and-wife team, Drs. Brendan and Alexis Hallissey, appreciate work-life balance with support from Heartland Dental.



Brendan Hallissey, DMD, AFAAID (left), and Alexis Hallissey, DMD

Foreside Family Dental in Kittery, ME, was not just the union of two local practices during the process of affiliation — but a practice run by the husband-and-wife team of **Brendan Hallissey, DMD, AFAAID**, and **Alexis Hallissey, DMD**. Before becoming Heartland Dental supported doctors, it was apparent to both that starting a family and running not one, but two practices was an unsustainable situation, largely due to the time demands of day-to-day management.

At first, the pair had mixed feelings about working with a Dental Support Organization (DSO). But by the time it was over, they discovered that they had time for the things they truly loved: Their patients, their teams, their new family, and even the ability to relocate when an opportunity arose.

Before affiliating with Heartland Dental, both doctors had separate offices just down the street from each other. Both were keeping their own books and managing their own employees, often trying to fit in these management tasks between seeing patients. Dr. A. Hallissey recalls what it was like at their practices before Heartland's support: "I was working about 50 hours a week chairside, and that was just completely unsustainable," she admitted. "Not to mention that we wanted to start a family. But we barely got to see each other because we were so busy treating patients, doing bookwork, managing our teams, and all the other issues that go along with owning your own practice."

Dr. B. Hallissey echoes his wife's concerns: "One of our personal core values is work-life balance. And at that time, we were definitely out of balance. We wanted to start a family, but we just weren't able to focus on that. We knew that our offices were not sustainable. My basement office was just this pile of papers and tax documents!"

That's when he floated the idea of joining the Heartland Dental community. There was, of course, some initial skepticism about selling the practice. "At the time, I thought, 'Are you crazy? Why are we going to sell our practices?'" remembers Dr. A. Hallissey.

"But then, after the initial emotional reaction played out, we decided to be open-minded and go visit some Heartland Dental supported practices around the country."

That opportunity to talk directly and candidly with other Heartland Dental supported doctors turned out to be incredibly important in their decision making. "There was one doctor in particular, from Texas, who had just come back from maternity leave. She had so many positive

things to say about how Heartland supported her team while she was away.

"That's when I realized — this might be a good idea after all!"

Once both doctors had made the decision to affiliate, their practices were combined under one roof. Over the next year, the pair took the time to learn more about the tools and systems that were available to them.

Dr. B. Hallissey admits, "Some areas were not working smoothly before affiliating, and I was

just kind of winging it! I realized that Heartland had great systems and processes to really help our practice — things I didn't even know about prior to affiliating. We chose which ones to implement, and it's been beneficial in many ways."

A great example of what they've learned, is in the area of communications. One

of the first courses that Dr. B. Hallissey chose to attend from Heartland Dental's extensive list of learning opportunities was focused around communication. "That's when our team really started to connect," he explains. "I had been practicing for 10 years, but there were still a lot of things I didn't know, because I didn't learn them in dental school. Things as simple as how to talk to my patients, how to interpret their nonverbal cues, and how to better connect with them during the process of diagnosis."

That kind of education and support really helped to make the practice more manageable on a day-to-day basis. And that's when more tangible benefits of Heartland

Dental's support became apparent: "We started to implement these communication skills that we had learned, and I realized that I was doing better work because of it. And then it also hit me: I'm focusing on my patients more because I'm not going back to my office to do QuickBooks in between sessions."

The process of affiliation had a positive effect on their teams as well. "Sure, our process had some initial growing pains,"

admits Dr. A. Hallissey. "Our team was hesitant, but they trusted us to do the right thing and take care of them. Together, we all made it through the transition, and ended up a lot better because of it."

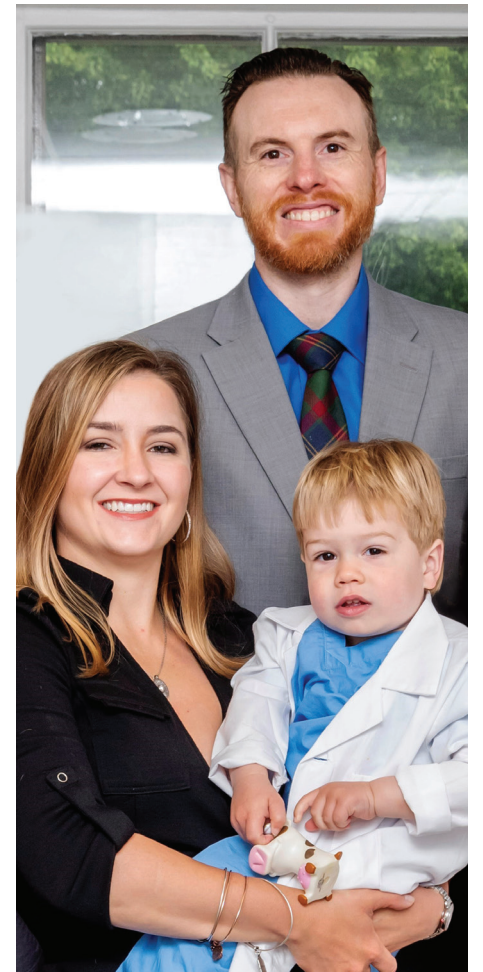
"It's my responsibility to not only care for

"Having the support of Heartland Dental really made me feel a lot better about the practice of dentistry. Having the time to focus on patients and family has truly rejuvenated me. It's also rejuvenated us."

Dr. B. Hallissey

my patients, but to also care for my team," adds Dr. B. Hallissey. "An added benefit of being supported by Heartland is having more security for my team. I know they are going to get paid, and the heat will stay on. If something should happen to me or Alexis, our team will be okay."

And because the team was being cared for, the pair entrusted even more non-clinical administrative support functions to Heartland Dental, giving them back precious time to spend together, time to vacation, and time to welcome their first child. When not playing outside with their son and their Toy Fox Terrier, the couple enjoys cooking, traveling, and teaching. "Having the support



of Heartland Dental really made me feel a lot better about the practice of dentistry," says Dr. B. Hallissey. "Having the time to focus on patients and family has truly rejuvenated me. It's also rejuvenated us."

So much in fact, that in early 2021, the pair relocated to South Carolina to enjoy a warmer climate and year-round access to fishing and water sport opportunities. "We believe in the company, its mission and leadership, and are grateful to continue our journey with the Heartland family," adds Dr. A. Hallissey.





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HAVING IT ALL, Even During Transition

With Heartland Dental's support, Dr. Anne Galbreath transitions on her own terms while discovering many unforeseen benefits.

Career transition and retirement should be an easy — even joyful — capstone to one's career. But making that happen requires both planning and support. Heartland Dental has helped hundreds of supported dentists make the transition, on their own terms

This flexible transition was exactly the kind of opportunity for which **Anne Galbreath, DDS**, was searching. Dr. Galbreath has been practicing in the Dallas-Fort Worth area, including Flower Mound, since 1991, and has made a name for herself in the community by providing high-quality care to her patients. Dr. Galbreath has also previously served as an assistant clinical professor at Baylor College of Dentistry.

With such a long and distinguished career already achieved, Dr. Galbreath was seriously contemplating how to best transition her practice. "I wasn't ready to retire, but I also didn't want to leave my retirement strategy as a big question mark on the horizon," she recalls. Dr. Galbreath had some specific goals in mind for her transition, including selling her practice, but with the option to continue practicing part-time; adding a full-time associate to take on the bulk of the clinical work; and continuing to advance the practice.

As it turned out, this set of goals was a challenge when weighing transition options. "Continuing to practice at your office isn't a guarantee in every situation when a dentist sells his or her practice," explains Dr. Galbreath, "and if I slowed down, as the only doctor in my office, then my business would

lose value. Why should I have to choose between continuing to practice and receiving optimal equity? Why should anyone? That was the solution I hoped to find."

Her search for suitable options included a discussion with a long-time mentor, who suggested Dr. Galbreath reach out to Heartland Dental to discuss affiliation options.

"I received a fair valuation for my practice," Dr. Galbreath says. "That, plus the opportunity to continue practicing, were key in making the choice to move forward affiliate with Heartland Dental."

But change always brings challenges, too, and affiliating with a DSO is no different. This

"Why should I have to choose between continuing to practice and receiving optimal equity? Why should anyone? That was the solution I hoped to find."

Dr. Anne Galbreath



is where Heartland Dental's support teams are vital to a practice's success, and Dr. Galbreath isn't shy about advising other doctors to utilize them. "If you come across challenges in this process, my advice is to be patient and utilize your support system," suggests Dr. Galbreath. "Whether it's with the help of Heartland's support team or from sharing experiences with colleagues, if you open the lines of communication, everything runs much more smoothly, and your questions will be answered quickly."


Now, looking back over the process of affiliation, Dr. Galbreath appreciates even more the changes she has seen in her practice and her team, many of which she did not expect. "Since affiliating with Heartland Dental, I've been able to be even more engaged in both the business and clinical aspects of my practice. And my team is becoming more and more engaged as well, as they develop higher levels of proficiency in their roles."

"I tell other doctors to be sure of their goals, and to know why they want to affiliate. Then make sure to communicate those priorities."

Dr. Anne Galbreath

"Our number of new patients has increased, and we have received positive feedback from our long-term patients on the increase in staff proficiency. Those patients themselves are more engaged in their own care, because my team is more effective at educating them. These were areas of opportunity that I didn't realize we had, but I'm so glad we're able to better accommodate them now."

Indeed, the level of continuing education offered by Heartland Dental was one of the most unexpected benefits of becoming a supported dentist. "I honestly didn't realize the vast amount of continuing education that would be available to supported doctors and team members," admits Dr. Galbreath. "That proves that Heartland Dental is a true support organization. They take care of us, so we can best take care of our patients."

When asked what advice she would give to other dentists looking to transition, she recommends much the same approach that she herself took. "I tell other doctors to be sure of their goals, and to know why they want to affiliate. Then make sure to communicate those priorities," she explains. "My advice is to be very honest about your goals and future plans. Together, with the support of Heartland Dental, you can work out a customized solution." 

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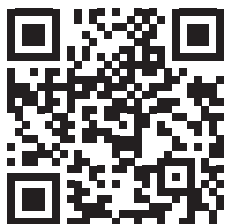
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Challenges Created an Abundance of Opportunities to Learn and Grow

Reflections on 2020
by Pat Bauer,
President and CEO
of Heartland Dental



It may be an understatement to say that we went through a lot as a company and as individuals over the past year. When I look back on 2020, I can't help but be grateful and proud of everyone at Heartland Dental. We pivoted. We built ourselves and our teams. We collaborated. We supported one another. And we continued to do the right things for the right reasons.

By focusing on our vision and mission, and by truly living our core values, we survived a year like no other — and together, we truly emerged as a more unified company.

I think it's important for us to reflect on the highs as well as the unexpected lows of 2020. Certainly, we had a year of challenges due to a global pandemic. Like

we often say however, with challenges, come opportunities. Silver linings if you will, for us to respond, to learn and grow, to enhance our systems and processes, and to ultimately advance our capabilities in serving our supported doctors and their teams.

After a strong start in January and February of 2020, we were headed into a year of enhancing our support levels and crushing company goals. In March however, we got the opportunity to prove just how integral our core values are to our culture and our world-class support.

COVID shutdowns forced us to furlough

“By focusing on our vision and mission, and by truly living our core values, we survived a year like no other — and together, we truly emerged as a more unified company.”

team members and to think differently in terms of moving forward to keep every single teammate protected, connected, and engaged so they knew how much we cared for their health and well-being. At the same time, we continued providing supported doctors and teams with the non-clinical administrative support they would need to weather the storm, while maintaining our focus on safety.

A COVID task force was immediately formed to provide guidance on the ever-changing landscape and to respond to executive orders, legislative, or regulatory action detrimental to or not feasible for supported offices and teams. As part of these efforts, the Heartland Dental procurement team not only scoured their resources to find and vet PPE for supported doctors and teams, but they were also able to help some of the largest healthcare systems and even some private practices obtain PPE as well. Now that's living our values!

We were mindful to not make any knee-jerk reactions. We committed to being guided only by science. Our support teams worked hard, smart, and together to take care of our entire Heartland Dental family.

In a matter of days, we transitioned over 600 support office team members into a

virtual workforce, where video calls became our everyday norm. Our teams not only survived in this new virtual environment, but also continued to provide world-class support to more than 1,100 offices. Even our 2020 Winter Conference took place virtually, and together we were able to safely celebrate and collaborate from our own homes.

The year 2020 was an all-hands-on-deck effort across our operations, administrative, and support office teams. I know it wasn't easy, but the Heartland Dental team certainly stepped up and responded to the challenges we faced.

As for the opportunities, so many great things happened as a result of us having been through COVID

closures and reopenings. These achievements are not only benefiting our supported doctors and teams currently, but will also continue to impact supported practices and Heartland Dental well into the future.

Advancements in marketing and technology have helped us to positively impact supported doctors and their new and existing patients. Reimagining our education programs to adapt to the virtual environment has led

to a hybrid of online and in-person classes to expand our reach and ability to meet supported doctors' and teams' needs. And, enhancing our systems and processes has enabled teams to continue providing

world-class support so that doctors and teams can remain focused on their patients and their communities.

I'm grateful for the many celebrations that took place in 2020. When I think back to April and May, I would have never dreamed that we would connect with so many practice owners during COVID, while continuing to grow our footprint post-COVID closures. In doing the right things for the right reasons however, we shared our knowledge, our resources, and our community with those outside of the Heartland family. And because no dental professional should have to go it alone — especially during a pandemic — we experienced an explosion of interest, and thus, record growth last year.

“Advancements in marketing and technology have helped us to positively impact supported doctors and their new and existing patients. Reimagining our education programs to adapt to the virtual environment has led to a hybrid of online and in-person classes to expand our reach and ability to meet supported doctors' and teams' needs.”

We opened 50 DeNovos in 2020 — many while working in virtual environments. And, we completed a record number of affiliations with more than 150 new practices across 26 states. Our first supported practice in Idaho was certainly cause for celebration as this expansion increased our support to 38 states!


Of course our company growth is important, but it's just as important that we make personal strides with the creation of our new Diversity & Inclusion Committee. With the horrific racial injustices our communities have faced, we

gave purposeful thought to how we could do better as an organization. I truly believe that we can all do more with regard to matters of race, justice, and equality.

This is very important to me and to our senior leadership team, and we are excited for the future of this initiative. We have invested a great deal of money and resources toward creating a stronger community — both inside and outside of Heartland Dental.

This is just another way that we can stay true to our mission and our vision and live our core values.

I am so proud of the way dental professionals responded to the challenges of COVID, as well as the efforts from our team members who provided world-class support to doctors and their teams. We remained strong and proved our resiliency in 2020 — not just to ourselves, but also to the entire dental industry.

I believe there is incredible opportunity for doctors to continue growing — both professionally and personally — in the year ahead, and I'm confident that Heartland Dental will continue enhancing our support to ensure the success of our supported doctors and team members. 

HEARTLAND DENTAL SUPPORTED DOCTORS In Their Own Words

Heartland Dental supported doctors gain immediate, real-time access to a nationwide network of over 1,800 supported colleagues. They are a community of clinicians who sincerely encourage and support one another while sharing experiences and advice. During the height of the pandemic, many specifically shared their thoughts and feelings on the pandemic, including the support of Heartland Dental, their affiliation, the shutdowns and reopenings, and the future. Here is a sampling of what supported doctors had to say in their own words.

“I had some time to reflect on how truly blessed we and our teams are to be part of this thriving company. The vision, leadership and cooperation we have between us supported doctors and Dr. Workman, Pat Bauer, all of our executives, and the Heartland team, is without a doubt a feat rarely seen and even less frequently imagined....”

To say that I am delighted and humbled to be a part of something much larger than just my single practice would be an understatement!

After nearly 7 years with Heartland’s support, I get more excited about our future each and every day! With 43+ years in our honorable profession, I believe my best years are yet to come.

Deno Chrysostom, DMD
West Columbia, SC

“I just can’t thank Heartland and the procurement team enough for taking care of us supported doctors and staff in a time like this.”

Hung Tran, DDS
Clarksville, TN

“One thing I will say after being supported by Heartland for almost 8 years, is that **they always have my back.**”

Joseph C. Ferraro, DDS
Madison, WI

“I have always loved the support of Heartland. I find it an honor to be affiliated with such a great organization, and I have never felt more grateful than I do now. Thank you, leadership team, for the support you provide every day. It really does make a difference in our stress levels and therefore boost our immunity! When I think back on these times, I will always be thankful for my colleagues in the Heartland community.”

Evelyn Ortiz-Castillo, DMD
Orlando, FL

“One of the things I’ve admired most about Heartland is its resiliency. The shutdowns and v-shaped recovery is just another example of Heartland’s adaptability. We have had many times through the years where it hasn’t been easy ... **Yet Heartland, and its supported dentists, have found a way to persevere and become better, stronger, smarter, and kinder.** It will be fascinating to watch where this company goes in the next 20 years. What a ride it’s been.”

Bill Bloink, DMD
Springfield, IL

“I know how many hours and days the supplies and lab team worked on sourcing the proper PPE... **I am so thankful that I can care for my patients and provide my team with what they need to be safe and healthy.**”

I don’t know how I would have done it on my own. Thanks to the best procurement team in the industry!”

Robert Mongrain, DMD
Broken Arrow, OK

“When I first considered affiliating with Heartland Dental in 2011, I was tired and stressed. I was working all day treating patients and most of the weekend was spent dealing with administrative duties. I also examined my P&L and recognized that even though I had a pretty large practice, I could not seem to contain variable expenditures, not to mention manage benefits for my team and deal with insurance I recognized that Heartland could not only offer me better day-to-day support but also address everyday costs and relieve me and my wife of hours of off-the-clock administrative responsibilities. I am now going into my 9th year with Heartland’s support and honestly believe that my practice life has been extended thanks to the diminishment of my non-clinical responsibilities. On top of all that, the support that the Heartland team provided during this pandemic has been nothing short of amazing. I know my colleagues who are not affiliated are still struggling, and I see the worry on their faces that is not present on my face because I don’t have that stress.”

Richard J. Reinitz, DDS
Pearland, TX

“We are beyond blessed. This organization has led and continues to lead in ways I could not even imagine when I affiliated about 10 years ago. **Many of us in private practice would have given up and closed our doors too soon after COVID, had we not already gained the support of Heartland Dental.**”

Phillip Neal, DDS, FAGD
Myrtle Beach, SC

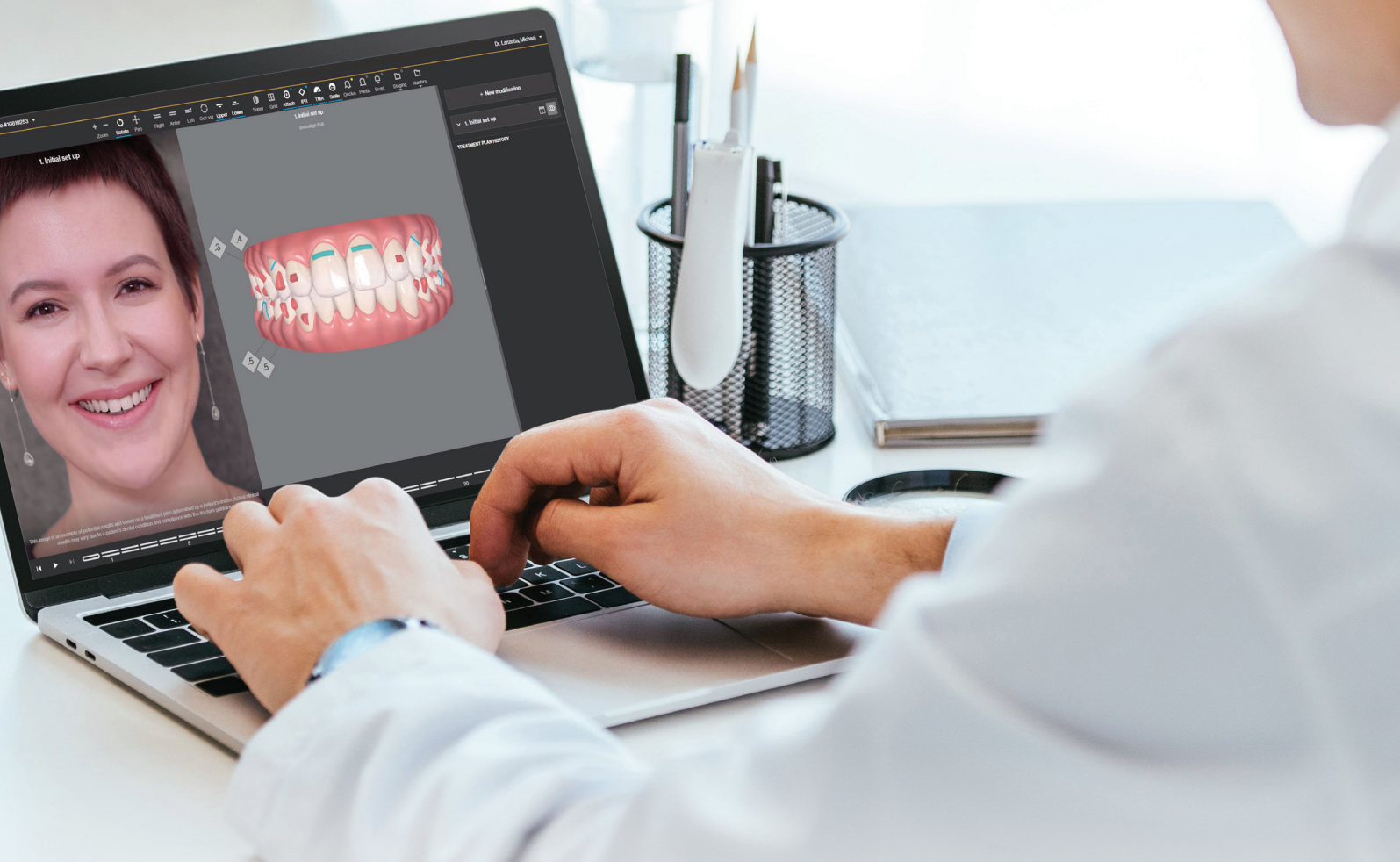
“I cannot express enough gratitude towards Heartland Dental teams working day and night to support us. **I have had many opportunities to be thankful since I became a part of the Heartland family, but this tops everything. Thank so much!**”

Vishali Sharma, DDS
Logansport, IN

“I feel so blessed and fortunate to be with Heartland during this unprecedented time. I would be lost if I was in private practice, but because of the assistance of Heartland’s leadership team and support team, we are leading the industry through these trying times.”

David A. Foster, DDS
Gallatin, TN

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Not an End, But a
NEW BEGINNING

Whether retiring early or leading her practice for years to come, Dr. Julia McGary remains the leader of her practice while finding a transition solution best suited to her needs.



All professionals, at some point in their career, begin thinking about retirement.

When the daily grind of running a large practice gets to be too much, an early exit is tempting. This was exactly what **Julia McGary, RDH, DDS** was feeling when she first contemplated walking away from her practice. She had spent years building a large, successful practice. She enjoyed connecting with her patients, and she loved being able to care for them. So why did she want to end her career early? "It wasn't the dentistry per se," Dr. McGary explains, "It was all the other things I had to manage, including the staff, the increasing costs, and the shrinking reimbursements."

"I was done. I was going to walk away. I didn't want to do it another minute."

Retirement had already been on Dr. McGary's mind for a while, but at the time, she didn't see a clear way forward. "At 62, I was getting to the age where I needed to think about an exit strategy," she admits.

"I could tell right away that Heartland was different..."

Every person I met, every person I spoke with, was just so nice and positive. I still get emotional thinking about it!"

Dr. Julia McGary

"The problem was that my practice was so big, a younger dentist could not afford it. And, a new doctor just wouldn't be able to produce what I'm producing."

Following a particularly frustrating week, Dr. McGary remembered previously receiving marketing materials from Heartland Dental.

Although at the time she wasn't ready to join a Dental Support Organizations (DSO), she had in fact started thinking about an end-of-career transition. Those simple postcards which she had saved for years, suddenly prompted her to learn more about affiliation. After a long talk with her mentor about various DSOs and the benefits of affiliating, she decided the time was right. Dr. McGary reached out to a number of DSOs to learn more about their affiliation models and level of support.

She discovered Heartland Dental to be the best fit, for a number of reasons. "I could tell right away that Heartland was different. They kept asking me 'What do you want to do?' And 'How can we help you achieve your goals?' Every person I met, every person I spoke with, was just so nice and positive. I still get emotional thinking about it!" Dr. McGary's interactions with the Heartland Dental team were so positive that she immediately felt a connection and was eager to join a community of like-minded professionals.

But what was most important to Dr. McGary, was having her practice remain doctor-led, with all clinical decisions remaining in the hands of a licensed dental professional. Dr. McGary recalls the conversation she had with her Heartland Dental practice transition representative: "He said that there would be no change at all in my clinical decisions. It was then that I began to appreciate just how

much Heartland is doctor-led." It was the ability to retain her leadership of the practice and design her own transition plan which sealed Dr. McGary's decision to affiliate.


"Having Heartland Dental's support — to relieve me of the day-to-day non-clinical burdens of running the office — is so important," admits Dr. McGary. "There are professionals at the practice level and the regional level who specifically help to

"Having Heartland Dental's support — to relieve me of the day-to-day non-clinical burdens of running the office — is so important. They are my team, to support me! But everything is still my decision."

Dr. Julia McGary

manage the administrative operations. They're my team, to support me! But everything is still totally my decision."

Today, Dr. McGary has found a new sense of purpose in the practice she built. For the first time in a long while, she feels that she is getting the support needed, and is free to practice dentistry in whatever way she sees best for her patients. Better still, she has the freedom to stay in the practice as long as she wants, and transition when ready. "Today, we have a new supported doctor in the practice to help us out. It's been wonderful; he's blended really well with my team," says Dr. McGary.

That said, Dr. McGary admits that she likes not having a set retirement deadline, especially now that she is enjoying her practice again. "If things continue the way they have, with the support of Heartland, I could see myself staying much longer than I had originally planned." 



Dr. McGary and her team at her practice, Cedar Family Dental in Marysville, WA.

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MAKING TIME, CONTINUING A LEGACY

Dr. Matthew Lark finds a way forward, transitioning his specialty practice.

It should come as no shock that dentists put their hearts and souls into building their practices. Once a practice becomes successful, it's natural to think about its future — specifically, how to continue caring for patients and team members. The thought of what might happen when the dentist is no longer a daily fixture in the office can cause much anxiety for established doctors.

No one understands that better than Matthew Lark, DDS MAGD, of Toledo, Ohio. Dr. Lark started his practice over 40 years ago, and in that time has built a thriving business with patients coming from far and wide as he is one of only five Orofacial Pain Specialists in Ohio. Given the advanced dentistry that he performs, Dr. Lark knew that a solid transition plan would be important for continuing to care for his patients, and for maintaining his legacy.

This realization was the start of Dr. Lark's journey to seek the support of Heartland Dental. "It's given me a chance to concentrate on perfecting my art, continuing the education that I need to stay on top of things," he says. "As time moves forward, in my later years, I want to do nothing but help people and teach what I know."

This was a tall order. Because Dr. Lark's practice was both so broad and so specialized, he was worried about how his patients would be served if he were not there himself. "Looking at my future and the future of my office, my wife and I considered all the options for transitioning," reminisces Dr. Lark. "The obvious one was to find and bring in an associate. But that really didn't make sense in my case. We thought, 'Why would we share what we're doing with someone who hasn't necessarily made a commitment to it?'"

His incorrect assumptions about affiliating with a Dental Support Organization (DSO) meant that Dr. Lark and his family put off the decision for some time, fearing the uncertainty while worrying about the legacy he would leave with his practice. But that hesitance changed when Dr. Lark developed a knee problem that required 12 separate surgeries — the last five of which



had to be done by specialists in New York City, which was hundreds of miles away from his practice.

"While I was going through those surgeries, I had other doctors in my community come in and help. And I thought, 'What would happen if people started leaving my practice because I wasn't there?' I was afraid


that it would decrease the value of the practice and therefore reduce my return on investment. All those years in the practice would go down the drain because I wasn't there to take care of my patients."

After discussing his options with other doctors, many of whom were already supported by Heartland Dental, he realized his need to be proactive about transitioning his practice. That's when he started to understand all the benefits of being a Heartland Dental supported doctor.

Indeed, being part of an active community of like-minded supported dentists was itself one of the biggest benefits, as supported doctors are able to share information and help each

other with growth and development. "I mean, what a bonus it is when you can have honest conversations with somebody, and really enhance each other's ability to practice," commends Dr. Lark. "It's nice to have a community of professionals who understand the problems that we face."

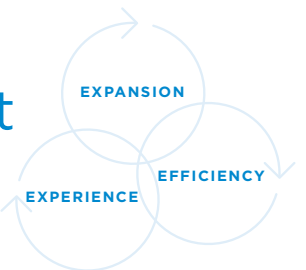
"My family came to the conclusion that it made excellent sense to affiliate — from both a business point-of-view as well as from me wanting to continue as an operating doctor," concludes Dr. Lark. "The idea of being able to go to work and still do what I do without changing my modus operandi, was a win-win situation." And he hasn't looked back; since making the decision to affiliate with Heartland Dental, the practice has grown, and a new partner is now being mentored in his area of expertise. Dr. Lark has also explored more teaching opportunities, dedicating the latter part of his career to helping the next generation of dentists while expanding his legacy even further.

For Dr. Lark, however, being a supported dentist means, first and foremost, that he can put people first. "When I turn 65, I'd like to not have to work around the clock. Heartland Dental's support gives me that freedom; it allows me some latitude. I'd like to visit my grandkids and go see my daughters in Los Angeles and New York. I need time off to do that. Now, I have an associate that can be there for our patients. And Heartland is always there for both of us, ready to provide continued support as well as educational and growth opportunities." 

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Perfection vs. Proficiency

Revelations of a 25-year Dental Educator and Road Warrior

By John C. Cranham DDS

I have had the opportunity to sit down with Heartland Dental Founder and Executive Chairman, Dr. Rick Workman, a number of times. Probably like a lot of you, I am always struck by his down-to-earth and affable personality. I have also noticed that I always take away great nuggets of his wisdom following each conversation.

During one such discussion with Dr. Workman, we were talking about training doctors towards a high level of competency. While I can't remember the exact word that I used, I do remember he didn't particularly like it. I think I used words like perfection, optimum dentistry, or excellence. He leaned into me, looked me dead in the eye and said, "We need to teach proficiency."

That word — proficiency — has haunted me ever since. To understand why, let's review a couple of definitions, and better understand how continuing education has evolved since the early 1990's.

Proficiency: a high degree of competence or skill; expertise.

Perfection: the action or process of improving something until it is as faultless as possible.



When I finished my dental education in 1988, the number of CE opportunities were limited. This was before YouTube, Facebook or any online presence. Powerpoint and Keynote did not yet exist, so creating professional presentations was laborious. Hours were spent laying out slides on glass tables and then carefully loading them into multiple-slide carousels. Most presenters lectured with two screens, while the "big dogs" lectured with three.

The lecturing industry was in its infancy, and even the majority of the best teachers were still making their income from their practices. Those dentists were drawn to teach because they felt the need to share their professional wisdom. As a young dentist, I sought out those speakers because they not only gave instructions on how to complete procedures, but they also focused on efficiency and profitability.

Through my training, I gained experience integrating the occlusal principles from

Dr. Dawson (who was still practicing 4 days a week at that time), along with the emerging cosmetic material from doctors who were red hot in the early 90's (Drs. Spear, Dickerson, Hornbrook, Rosenthal, and Nash).

As I mastered these concepts, I began to present The Cosmetic-Occlusal Connection, which integrated occlusion with smile design. At that time, I was making approximately 85% of my income from performing dentistry and another 15% from speaking; I was committed to teaching dentists how to do what I was doing and how to integrate it into their practice, which was the essence of proficiency — teaching a high degree of expertise that would lead to a combination of excellence and efficiency, that will ultimately result in profitability.

There was a shift however, towards more of a perfection mindset, as we approached the late 1990's with the aesthetic revolution in full swing. We began to present from computers, and it became much easier

to achieve success as a speaker. Programs like Keynote and Powerpoint were easy to learn, and far easier than putting slides into carousels. Copy, cut, and paste was a lifesaver! Additionally, funding to pay speakers seemed to increase dramatically. Almost overnight, many dental educators were spending very little time in their offices and receiving most of their income from speaking engagements and manufactures. These dentists became further and further removed from the

realities of day-to-day practice. While I wasn't one of those doctors (I still practiced 4 days a week and would not take money directly from manufacturers), speaking every Friday quickly made up one-third of my income. During this time the pressure to be entertaining while showing "perfect" dentistry began to weigh on me.

Today, we have all those same influences along with the opportunity from social media to share our "perfect" post op results. While I love seeing excellent outcomes, I believe there needs to be some context as to what went into achieving those results.

Personally, as my own speaking career evolved and more of my income came from speaking, I became further removed from having to treat my patients with the same degree of efficiency as a standard general practitioner. I began looking at my cases not just in terms of providing great care for my patient, but how I could document what I was doing to attain the "perfect"

end result. This obsession with perfection often led to additional steps that were not

practical for the general practitioner.

So, when Dr. Workman reintroduced me to my new favorite word — proficiency, I began to look for educators who were providing the proper balance of excellence and efficiency. Turns out, world-class training was right in front of me; all I had to do was take advantage of it!

In July of 2020, my daughter joined me as a Heartland Dental supported doctor following

her graduation from the University of Louisville School of Dentistry. In my years as a supported doctor, I hadn't experienced

many of the CE classes which Heartland Dental offered, so I decided to tag along with her during her first year of Heartland Dental offered training. The first course we took was the Wave One endo class, taught by Dr. David Landwehr. Next up was the surgical class taught by Dr. Matt Fien. Both classes blew my mind! They beautifully presented with excellent documentation and plenty of scientific research behind what they were doing, and I could feel that they were in the trenches every day, practicing what they were preaching. They presented successes, and they also presented failures. They taught what to do and more importantly what not to do. I believe this is the essence of what Dr. Workman was talking about, which made me think of an additional problem with traditional continuing education.

One of the most frustrating things about providing CE to the masses is that the only metric used to assess success is the feedback from the participants. Instructors have zero idea how they are helping the bottom line of a participant's practice. At Heartland

"Quality education needs to be tied to tangible measurement to ensure it provides the attendees' return on investment of both time and money... this type of continuing education was not something to which I previously had access. Part of the magic of Heartland Dental is that we are all on the same team."

Dr. John C. Cranham



Dental, the ability to truly measure the level of implementation — and the ultimate effect on the bottom line — is amazing. The clinical educational team is laser focused on utilizing great speakers (many of whom are supported doctors) who are not only entertaining, but also demonstrate beautiful work while delivering the care in a highly efficient manner. Additionally, the clinical education team works diligently to not only ensure the information is correct, but more importantly, that the knowledge shared can be successfully implemented in your practice.

As I have followed the first-year training path alongside my daughter, I continue to be impressed by the high quality of the courses. As a result, I have found myself performing molar endo, removing teeth, and doing simple bone grafts — all procedures that were far removed from what I had previously focused on for the past 30 years. And you know what? I love it! It has helped me enjoy dentistry even more, assist more patients, and improve my production. These are all very good things, especially for an old dog like me.

My point is that quality education needs to be tied to tangible measurements to ensure it provides the attendees' return on investment of both time and money. While

“I am now devoting more time to understanding the Heartland Dental systems and process as well as connecting more deeply with my Heartland family. Additionally, I have reassessed the way I have been teaching to improve on what I am delivering.”


Dr. John C. Cranham

I am extremely proud of my career both as an educator and in my own company, as well as the Clinical Director of The Dawson Academy, this type of continuing education was not something to which I previously had access. Part of the magic of Heartland Dental is that we are all on the same team. As we train to improve our skills and expand our capabilities, our own production goes up and we can help increase the value of the company. It's a win-win for all of us!

As a result of the pandemic, I've had more time to think and to clarify my goals for my

remaining time in dentistry (7-10 years). This led to my discovery of wanting to teach less (I was teaching 50-60 days a year pre-COVID), to step down as Clinical Director of the Dawson Academy, and to have more time to practice dentistry with my daughter.

I am now devoting more time to understanding the Heartland Dental systems and processes as well as connecting more deeply with my Heartland family. Additionally, I have reassessed the way I have been teaching to improve on what I am delivering.

The changes have had a positive impact on my life, my practice, and my vision as an educator moving forward. While many factors are involved with these improvements, I believe that much of it is directly related to becoming reacquainted with the P word that once haunted me. Let's all focus on proficiency in 2021! 



Dr. John Cranham affiliated with Heartland Dental in 2015 after feeling the growing demands of balancing both the clinical and business responsibilities of his practice and maintaining his educational responsibilities with The Dawson Academy. In searching for a solution, he spoke with a number of DSOs and was impressed by Heartland Dental's customized solutions for his unique needs. "Compared to other dental support organizations, Heartland Dental doesn't focus on creating one standard system; instead, they create a structure of support to help individual dentists practice the way they want to practice," said Cranham. As a result of his affiliation, Dr. Cranham discovered a better work-life balance which affords him more time to focus on his role as an educator and a clinician, as well as life outside of dentistry.



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