

# NexTec Group And Pacific Dental Services A Relationship Worth Smiling About



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**A**s a dental management service organization, Pacific Dental Services helps dentists be more productive and profitable by handling all the non-clinical tasks required to run an office. From accounting and staffing, to site selection and information technology, Pacific Dental Services successfully manages more than 70 dental offices throughout the State of California.

## **Grit Your Teeth**

The complex distributive nature of its business was stretching the Pacific Dental Service’s entry-level software to its limits. Producing consolidated financial statements in a timely fashion was like pulling teeth. Complex allocations and multi-company transactions were performed outside the software and then manually re-entered.

Each month the various offices received an email containing a complex, multi-tabbed Excel spreadsheet outlining revenues and expenses for the period. Office managers and owner dentists placed frequent calls to Pacific Dental Services’ accounting department requesting explanation of and the detail behind the numbers.

To prepare, input, and adjust budgets was a grueling task, requiring each office to key data into a spreadsheet and then email it to the business support office. There was no way to track the individual changes users made and updating formulas was tedious and cumbersome. Obtaining a consolidated budget for a specific region, or the company as a whole, involved formulating literally dozens of spreadsheets.

## **An Appointment With The Pros**

Brady Aase, Vice President of Finance at Pacific Dental Services, recalls the situation all too well, “It was a royal pain. We had clearly outgrown the software, but weren’t sure if anything out there could meet our needs.”

His team began to hunt for a financial accounting system capable of handling Pacific Dental Services’s unique corporate structure. Powerful financial reporting, flexible allocations, multi-company processing, and streamlined budgeting would be the key

attributes of the winning solution.

Of equal importance would be the business partner backing the software. While technologically savvy, Pacific Dental Services wanted a business partner they could depend on. After an extensive and lengthy search for a solution and business partner that would meet their needs, Pacific Dental Services selected NexTec Group. NexTec Group’s consultants impressed Pacific Dental Services with their ability to understand the company’s complex corporate structure and diverse business needs. During the demonstration, NexTec



NexTec Group gives Pacific Dental Services much to smile about.

Group showed Pacific Dental Services precisely how the software would work for them, running sample transactions and detailing the workflow. “They made the decision easy for us,” Brady recalls, “We had complete confidence in NexTec Group’s ability to do what they said they would.”

## **Successful Treatment**

Pacific Dental Services had amassed a tremendous volume of data over the years, and the decision was



made to bring all of that data into the new software. Working closely with NexTec Group's consultants, the transition team exported the data from QuickBooks into Excel, manipulated it into the desired format, and then successfully imported the data into the new system. Hundreds of thousands of transactions were imported this way, with the crowning achievement being full historical data in the new system from Day 1.

NexTec Group, working with Pacific Dental Services, designed a budgeting solution that effectively allows Pacific Dental Services to control the workflow and enables their dental office managers to input their budgets over the Web. With a secure login, budget managers can perform budget maintenance at their convenience, with each round of changes tracked in detail by the system. Pre-defined budgeting models are updated for all users from a single location. Authorized users can analyze that budget data in virtually any way they need to: detailed by individual location, or consolidated by various levels in the management hierarchy.

NexTec Group worked with Pacific Dental Services to develop a comprehensive set of financial reports to meet the complex and varied needs of the organization. They put in place a streamlined report-delivery system that automatically produces discrete financial statements for each location and uploads those statements to a secure Intranet site. Robust security ensures that each location can only view the data relevant to them. Drill-down capabilities enable viewers to uncover the transaction level detail behind the totals. Dentists and clinic owners can now get true operating results on their clinics, all accessible from their office or from home. "Our clients have access to much more information than ever before; it's both well organized and targeted to meet their needs," says Brady. Consolidated financial reports are just as easy to produce. Now he can perform consolidations easily for a specific region, manager, or for the company as a whole.

As much as 50-60 percent of the financial transactions performed by Pacific Dental Services' staff are related to allocating costs to the various locations. While many

discrete costs are easily attributed to an individual office, other costs such as the company's liability insurance are allocated to each location based on attributes such as the cost of contents or square footage of the office. NexTec Group's solution allows for the automation of many of these allocations based on predefined allocation schedules. Multi-company accounting transactions are handled quickly and accurately. Instead of manually separating a single vendor's invoice into 60 or 70 vouchers, the inter-company transactions are posted automatically.

### **Efficiencies Abound**

Since adopting the new system, Pacific Dental Services has added 20 offices, but no additional personnel. "Our accounting costs to revenue figure has stayed flat, even with the tremendous growth we've experienced."

Brady knows the new system has saved the company more money by eliminating invoice duplication and potential vendor overpayment. Invoice numbers are validated, even across companies, to ensure that duplications do not occur.

Streamlined and vastly improved reporting capabilities save time, effort, and labor costs. "Monthly reporting used to take one full day of our time, now it takes half an hour," says Brady, "We're now able to close the books consistently by the 15th of each month — an impossibility before." Thanks to the automated allocations and efficient multi-company processing, data entry tasks have been significantly reduced. With office managers and owner dentists able to directly access detailed information about their financial performance, Aase and his staff spend less time on the phone. "Hands down — this system is 100 times better than our old way of doing business. It's highly scalable, yet able to be managed by a smaller staff."

Just as Pacific Dental Services empowers dentists to do what they do best — NexTec Group, by providing exceptional technology services and support, empowers Pacific Dental to focus on what it does best. A relationship worth smiling about.



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