

OrthoFi. Ortho|Banc.

# NEXUS

2023 | CONFERENCE

*WHEN THE WINDS  
OF CHANGE BLOW...*

**BUILD  
WINDMILLS,  
NOT WALLS**

Feb 9-11, 2023  
DENVER, CO



# WELCOME!

Please visit [info.startmoresmiles.com/nexus](https://info.startmoresmiles.com/nexus) for updates and information throughout the meeting!



## IMPORTANT DETAILS

### RESTAURANT RESERVATIONS:

**720-452-6900**

Restaurant Reservation within the automated answering service.



SCAN FOR A  
LIST OF ON-SITE  
DINING OPTIONS

GET DRESSED UP IN  
YOUR WESTERN DIGS

**NEXUS 2023 WILD WILD WEST PARTY**  
FRIDAY, FEBRUARY 10TH AT 8:00PM

JOIN US FOR A NIGHT OF LIVE MUSIC, NETWORKING,  
DANCING, DRINKS AND SO MUCH MORE!



**DIAMOND  
EMPIRE**  
BAND



# BONUS THURSDAY SESSIONS

1:00-5:30PM

## Practice Growth Seminar For Practices Not Using OrthoFi (Spruce 1)



INTELLIGENT FLEXIBILITY:  
THE DATA BEHIND THE SYSTEM  
**OLIVER GELLES - OrthoFi**



THE NEW PATIENT CALL AND  
HOW TO MAXIMIZE KEPT NEW  
PATIENT EXAM RATE  
**BRIAN WRIGHT - New Patient Group**



THE ANATOMY OF THE  
SAME-DAY START  
**DR. JAMIE REYNOLDS &  
DANIELLE OFFERMAN**  
- Reynolds Orthodontics



THE ROI OF LEVERAGING  
TECHNOLOGY AND SERVICE  
PARTNERS TO SCALE YOUR BUSINESS  
**DR. ALYSSA EMORY-CARTER**  
- Stokes & Carter Orthodontics

## Best Practices of the OrthoFi Super User For OrthoFi Users (Juniper)



INTRODUCTION: ARE YOU USING  
ORTHOFI IN THE BEST POSSIBLE WAY?  
**SARAH FUNSCH - OrthoFi**



TRUSTING THE SYSTEM AND  
OUTSOURCING PARTNERS  
**KENNETH MOSS - Depew Orthodontics**



THE NEW PATIENT SCHEDULING CALL  
**HEATHER TUTTLE - OrthoFi**



DASHBOARD MANAGEMENT /  
THE ADVANCED TREATMENT  
DETAILS PAGE  
**PAULA MCGINTY - OrthoFi**



HOW TO BE AN ORTHOFI MANAGER /  
THE VALUE OF THE MONTHLY  
BUSINESS REVIEW  
**TARA BAILEY - OrthoFi**

# AGENDA

## FRIDAY

6:00-7:00AM	<b>Yoga with OrthoFi Yogis (Maple 1)</b>			
7:00-8:00AM	<b>Breakfast: Sponsor Tables Open (Lobby)</b>			
	<b>General Sessions (Juniper)</b>			
8:00-8:15AM	When the Winds of Change Blow, Some Build Walls... Others Build Windmills - <b>Dave Ternan</b>			
8:15-9:15AM	GET IT ON! What it Means to Lead the Way - <b>Keni Thomas</b>			
9:15-10:00AM	The Four Winds of Change Challenging our Industry and the Metrics Every Practice Should Monitor - <b>Oliver Gelles</b>			
10:00-10:20AM	<b>Morning Break: Sponsor Tables Open (Lobby)</b>			
10:20-11:15AM	The Uncertain Winds of a Challenging Economy: Using data from the past to drive our current actions so we are prepared for tomorrow. - <b>Chris Bentson</b>			
11:15-12:00PM	Keeping Up the Pace: Scheduling the New Patient Exam in a Fast-Food Nation - <b>LeeAnn Peniche</b>			
12:00-12:45PM	The Power of a Limited Treatment Strategy to compete with DSOs and Direct to Consumer Aligners - <b>Tracy Martin</b>			
12:45-2:15PM	<b>Lunch: Sponsor Tables Open (Maple 3-4)</b>			
	<b>Doctor (Spruce 1)</b>	<b>Treatment Coordinator (Spruce 3)</b>	<b>Financial Coordinator/Insurance Coordinator (Spruce 4)</b>	<b>Financial/Insurance Alternative (Spruce 2)</b>
2:15-3:00PM	Using Technology to Increase Practice Efficiency and Create More Clinical Capacity - <b>Dr. Bill Dischinger</b>	Master the 45-Minute Doctorless Exam with Sales Coach Brooke Oliphant - <b>Brooke Oliphant</b>	Buying into Change and Reframing Responsibilities - <b>Rachel Kopp and Michael O'Muireadhaigh</b>	Insurance and Financial Coordinator Masterclass - Day 1 - <b>Tina Byrne</b>
3:00-3:45PM	Leveraging Your Time Through Doctorless Consults - <b>Jill Allen</b>	Leveraging Technology to Create Raving Fans and Master the Adult Start - <b>Janelle Baum</b>	Managing Your Financial Records in OrthoFi - <b>Cathy Jugovic and Angie Menendez</b>	
3:45-4:05PM	<b>Afternoon Break: Please Visit Our Sponsors (Lobby)</b>			
	<b>Doctor (Spruce 1)</b>	<b>Treatment Coordinator (Juniper)</b>	<b>Financial Coordinator/Insurance Coordinator</b>	<b>Financial/Insurance Alternative (Spruce 2)</b>
4:05-4:50PM	Predictable New Patient Revenue Starts with Perfecting the New Patient Phone Call - <b>Amol Nirgudkar</b>		Your Insurance Journey: A Look at the Best Practices for Managing the OrthoFi Insurance Partnership - <b>Paula McGinty</b>	Insurance and Financial Coordinator Masterclass - Day 1 - <b>Tina Byrne</b>
4:50-5:30PM	Recruiting and Retaining a High Caliber Team - <b>Rachel Kopp and Michael O'Muireadhaigh</b>			
8:00-11:00PM	<b>NEXUS 2023 PARTY FEATURING DIAMOND EMPIRE (Juniper)</b>			

# AGENDA

## SATURDAY

6:30-7:30AM	Yoga with OrthoFi Yogis (Maple 1)		
7:30-8:30AM	Breakfast: Sponsor Tables Open (Lobby)		
	Doctor (Spruce 1)	Treatment Coordinator (Juniper)	Financial/Insurance Alternative (Spruce 2)
		Financial Coordinator/Insurance Coordinator	
8:30-9:15AM	The Truth about Practice Valuation: How to obtain maximum value when it is time to sell your practice - <b>Charles Loretto</b>	Serve MORE Patients Through Tiered Treatment Options - <b>Michelle Shimmin</b>	Insurance and Financial Coordinator Masterclass - Day 2 - <b>Tina Byrne</b>
9:15-10:15AM		More than a Slider: The Power of Intelligent Flexibility and How to Use It - <b>Sarah Funsch and Allyson Griffith</b>	
10:15-10:45AM	Morning Break: Sponsor Tables Open (Lobby)		
	General Sessions (Juniper)		
10:45-11:30PM	The Windmills I Built While Growing my \$2M, 2 Employee Practice. - <b>Dr. Bob Skopek</b>		
11:30-11:45PM	Best of the Best: Leaderboard Results		
11:45-12:00PM	NEXUS Wrap-Up: Build Windmills, Not Walls. - <b>Dr. Jamie Reynolds</b>		



## WHEN THE WINDS OF CHANGE BLOW, SOME BUILD WALLS...OTHERS BUILD WINDMILLS

**SPEAKER: DAVE TERNAN**  
*Co-Founder & CEO - OrthoFi*

RECOMMENDED AUDIENCE: **ALL**

Friday, February 10th 8:00-8:15am  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

D: So proud that OrthoFi surpassed 1 million patient starts using the OrthoFi Platform this year.

**Q: What is your best piece of advice for practices right now?**

D: Focus on your people. The world is a crazy place right now on a number of levels, and your team needs your support more than ever.

**Q: What is one myth about this industry or running a practice that you want to bust?**

D: I hope that, based on our incredible results, we can debunk the myth that you need to tie payments lengths to the length of treatment.

**Q: What is one industry prediction you have for 2023?**

D: After a record year for starts in 2021, 2022 was a big letdown due to several factors. I believe that starts for 2023 will be flat to slightly up from 2022.

**Q: What are you most excited about at NEXUS 2023?**

D: Connecting in person with our Orthodontic partners!

**Q: What is your go-to karaoke song?**

D: Don't Stop Believing.

## NOTES





## DECORATED U.S. MILITARY VETERAN-TURNED-COUNTRY MUSICIAN

**SPEAKER: KENI THOMAS**  
*Keynote Speaker*

**RECOMMENDED AUDIENCE:** ALL  
Friday, February 10th 8:15-9:15am  
*Juniper*

In the summer of 1993 Staff Sergeant Keni Thomas was deployed to Mogadishu Somalia with the 3rd Ranger Battalion as part of an elite special operations package called Task Force Ranger. Their mission was to find and capture a criminal warlord named Mohammed Farrah Aidid. On the 3rd of October, Keni and his fellow rangers distinguished themselves in an eighteen hour fire-fight that would later be recounted in the highly successful book and movie “Black Hawk Down”. Nineteen Americans gave their lives and 78 were wounded in the worst urban combat seen by US troops since WWII.

Keni captivates audiences from beginning to end as he tells the incredible story of extraordinary individuals and how they fought to bring each other home. Drawing from his experiences on the battlefield, Keni inspires people to achieve greatness by stressing the importance of outstanding leadership at every level, even if the only person you are leading is yourself. His message of “Train as You Fight, Fight as You train and Lead By Example” epitomizes the Ranger motto “Rangers Lead the Way!” Keni sums it up like this, “Leadership has never been the rank, the position or the title you hold. It’s the example you set for the ones you serve. And we all serve somebody. There are people to your left and to your right

who are counting on you and it's up to you to deliver. But you will only be as good as you prepared yourself to be.”

After Mogadishu, Staff Sergeant Thomas became an assistant team leader for a six-man ranger reconnaissance team. He earned his master parachutist rating with over 400 military free fall jumps. He completed the Special Forces Combat Diver course, became an Advanced EMT and was one of ten Americans to complete the Belgium Commando Course. Keni left the Army to pursue his music career and became an award-winning country music recording artist and songwriter in Nashville. He and his band Cornbread were featured in the movie “Sweet Home Alabama” and his music can be heard on country stations nationwide.

Keni has been recognized by the President of the United States and has been awarded the American Patriot Award for his dedicated work on behalf of our veterans and their families. He is also a recipient of the bronze star for valor. Keni is most proud of his appointment as a national spokesman for the Special Operations Warrior Foundation. They provide college educations to the children of our special operations personnel killed in combat or training.

## NOTES



## THE FOUR WINDS OF CHANGE CHALLENGING OUR INDUSTRY AND THE METRICS EVERY PRACTICE SHOULD MONITOR

**SPEAKER: OLIVER GELLES**  
*Chief Marketing Officer - OrthoFi*

**RECOMMENDED AUDIENCE:** ALL  
Friday, February 10th 9:15-10:00am  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

O: OrthoFi has helped practices start over 1 Million patients with a revolutionary patient acquisition and revenue cycle management solution.

**Q: What is your best piece of advice for practices right now?**

O: Invest in people, process and technology to improve during down cycles.

**Q: What is one myth about this industry or running a practice that you want to bust?**

O: There are still practices who tie payment time and treatment time because they believe it will protect them against default, when that really just protects them from growth.

**Q: What is one industry prediction you have for 2023?**

O: Overall starts will be up slightly YOY, but adult starts will continue to lag.

**Q: What are you most excited about at NEXUS 2023?**

O: I can't wait to connect with our practices again, and to provide a special educational program that will help them prepare for the challenges ahead.

**Q: What is your go-to karaoke song?**

O: Trust me. No one wants me on the mic.

## NOTES



THE UNCERTAIN WINDS OF  
A CHALLENGING ECONOMY:  
USING DATA FROM THE PAST  
TO DRIVE OUR CURRENT  
ACTIONS SO WE ARE  
PREPARED FOR TOMORROW

**SPEAKER: CHRIS BENTSON**  
*Partner - Bentson Cople and  
Associates*

**RECOMMENDED AUDIENCE:** **ALL**  
Friday, February 10th, 10:20-11:15am  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

C: Best team in Orthodontics for Valuation/Transition/Recruiting/  
Corporate Brokerage.

**Q: What is your best piece of advice for practices right now?**

C: Plan and build your business around customer needs: efficiency,  
flexibility, great outcomes.

**Q: What is one myth about this industry or running a practice that you want to bust?**

C: It's not as good as it used to be, the golden age of ortho is over -  
total BS.

**Q: What is one industry prediction you have for 2023?**

C: Nine months of cold and rain, sun comes out in October and stays out  
for next two years.

**Q: What are you most excited about at NEXUS 2023?**

C: Learning what the OrthoFi and OrthoBanc data is telling doctors.

**Q: What is your go-to karaoke song?**

C: Heads Carolina, Tails California.

## NOTES



## PRACTICE STRATEGIES TO GENERATE ADDITIONAL NEW PATIENT EXAM CAPACITY

**SPEAKER: LEEANN PENICHE**  
*Consultant and President*  
*- Peniche & Associates*

**RECOMMENDED AUDIENCE:** ALL  
Friday, February 10th 11:15-12:00am  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

L: We build exceptional teams that produce extraordinary results.

**Q: What is your best piece of advice for practices right now?**

L: Don't participate in the recession. Work harder.

**Q: What is one myth about this industry or running a practice that you want to bust?**

L: That you can't get staff. Look harder. Recruit differently.

**Q: What is one industry prediction you have for 2023?**

L: This will be an excellent year for those who are willing to do the work and not let the economy be their excuse.

**Q: What are you most excited about at NEXUS 2023?**

L: New fresh systems that will simplify patients starting treatment by removing barriers.

**Q: What is your go-to karaoke song?**

L: Girl on Fire (do not ask me to sing!)



## NOTES



## THE POWER OF A LIMITED TREATMENT STRATEGY TO COMPETE WITH DIRECT TO CONSUMER ALIGNERS

**SPEAKER: TRACY MARTIN**  
*Founder & CEO - Straight Consulting*

**RECOMMENDED AUDIENCE:** ALL  
Friday, February 10th 12:00-12:45pm  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

T: We are a B-12 shot to practices looking to grow, while adding a “Millennial twist” on orthodontic practice management consulting by redesigning traditional ortho processes for Millennials and Gen Z.

**Q: What is your best piece of advice for practices right now?**

T: Consume as much coaching, advice, strategy and tips from as many industry experts as you can during 2023. They will help you thrive through a tough year of economic transition, rather than just survive.

**Q: What is one myth about this industry or running a practice that you want to bust?**

T: While running a practice lends itself to wonderful flexibility & profitability, the work-life balance & performance goals most are striving for can't happen without clear & healthy boundaries.

**Q: What is one industry prediction you have for 2023?**

T: I predict that we will start seeing more practices getting transparent with their pricing & displaying them on their websites & social channels!

**Q: What are you most excited about at NEXUS 2023?**

T: The content that will be shared and the new strategies that practices will be able to implement for the year!

**Q: What is your go-to karaoke song?**

T: Miley Cyrus - Party in the USA!

## NOTES



## USING TECHNOLOGY TO CREATE EXTRA CLINICAL CAPACITY

**SPEAKER: DR. BILL DISCHINGER**  
*Orthodontist - Dischinger Orthodontics*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 2:15-3:00pm  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

B: We don't just create beautiful smiles, but we do it while delivering superior customer service. The Team at Dischinger Orthodontics blows away any Disney, Ritz Carlton or Nordstrom team every day of the week.

**Q: What is your best piece of advice for practices right now?**

B: Don't eat the poi. Just kidding. If you aren't utilizing technology to change the way you practice, you will be left behind. Don't wait to adopt.

**Q: What is one myth about this industry or running a practice that you want to bust?**

B: That the doctor doesn't do anything, the team does all the work. Wait, that's actually true. Uhm, wait, I know. That patients want to come into our office. They want the result, but if they can get it with little disruption to their normal life and schedule, that's even better.

**Q: What is one industry prediction you have for 2023?**

B: In poor economic climates, the wheat gets separated from the chaff. Practices that aren't investing in technology and delivering excellent customer service are going to struggle in 2023.

**Q: What are you most excited about at NEXUS 2023?**

B: Giving Oliver Gelles a big kiss on the cheek! (no way I'm going lips). Actually, to listen to Keni Thomas speak.

**Q: What is your go-to karaoke song?**

B: Is there any other karaoke song than Journey's Don't Stop Believin'?  
Nope, I didn't think so.

## NOTES



## LEVERAGING YOUR TIME THROUGH DOCTORLESS CONSULTS

**SPEAKER: JILL ALLEN**  
*Owner & Founder | Practice Management Consultant*  
*- Jill Allen & Associates*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 3:00-3:45pm  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

J: Jill Allen & Associates are the ONLY orthodontic consultants to specialize in start-up orthodontic practices and assist doctors from inception to doors open and beyond.

**Q: What is your best piece of advice for practices right now?**

J: Jill Allen's best piece of advice to practices right now is to invest in your team and work to create value in their positions. Whether it's continuing education or team appreciation events, all of it adds up.

**Q: What is one myth about this industry or running a practice that you want to bust?**

J: The myth I would want to bust is the myth of "we've always done it this way so it must be right." This is rarely the case and can keep practices from thriving.

**Q: What is one industry prediction you have for 2023?**

J: One industry prediction I have for 2023 is that technology will be used more than ever in orthodontic practices in 2023. I also believe that if there is a recession, 3rd party financing and flexible payment arrangements are going to be the key to case acceptance.

**Q: What are you most excited about at NEXUS 2023?**

J: I am most excited to listen the wise sages of our industry and kick off the year with some amazing information for our industry.

**Q: What is your go-to karaoke song?**

J: I don't do karaoke... but if I did, it would be Friends in Low Places by Garth Brooks.

## NOTES



## PREDICTABLE NEW PATIENT REVENUE STARTS WITH PERFECTING THE NEW PATIENT PHONE CALL

**SPEAKER: AMOL NIRGUDKAR**  
*CEO - Patient Prism*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 4:05-4:50pm  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

A: Patient Prism leverages artificial intelligence to help grow your dental practice.

**Q: What is your best piece of advice for practices right now?**

A: Understanding your patient mix is important to achieve growth in 2023.

**Q: What is one myth about this industry or running a practice that you want to bust?**

A: There is always a way to accommodate the patients you want to see.

**Q: What is one industry prediction you have for 2023?**

A: Practice schedules are going to be less full and patient demand will be lower than 2021/2022.

**Q: What are you most excited about at NEXUS 2023?**

A: The quality of speakers is just amazing. There is a lot of emphasis around solving current problems facing the industry.

**Q: What is your go-to karaoke song?**

A: I wish I could sing :)



# NOTES



## THE TRUTH ABOUT PRACTICE VALUATION: HOW TO OBTAIN MAXIMUM VALUE WHEN IT IS TIME TO SELL YOUR PRACTICE

**SPEAKER: CHARLES LORETTO**  
*Partner - Cain Watters and Associates*

RECOMMENDED AUDIENCE:

DOCTOR

Saturday, February 11th 8:30-10:15am  
*Spruce 1*

**Q: Brag about your company/practice in one sentence.**

C: For over 35 years, we've been helping clients in all 50 states reach their practice and personal financial goals.

**Q: What is your best piece of advice for practices right now?**

C: In an inflationary environment, it's a perfect time to right-size your lifestyle, get rid of any short-term debt and look for any additional savings opportunities you can find.

**Q: What is one myth about this industry or running a practice that you want to bust?**

C: With the rise of DSOs and PE firms, private dental practices will soon go away.

**Q: What is one industry prediction you have for 2023?**

C: With buying opportunities in almost every area of the market, your investment portfolio and practice can thrive in 2023.

**Q: What are you most excited about at NEXUS 2023?**

C: Educating.

**Q: What is your go-to karaoke song?**

C: Kid Rock - All Summer Long.

# NOTES



## MASTER THE 45-MINUTE, DOCTORLESS EXAM WITH SALES COACH BROOKE OLIPHANT

**SPEAKER: BROOKE OLIPHANT**  
*Founder - Straight-Up Sales  
Orthodontic Coaching*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

Friday, February 10th 2:15-3:00pm  
*Spruce 3*

**Q: Brag about your company/practice in one sentence.**

B: Our partnership with Orthodontic practices transforms Treatment Coordinators into Rockstar Sales Professionals who quickly go from industry average to crushing goals and loving their career by elevating same-day sales and providing industry-specific sales training.

**Q: What is your best piece of advice for practices right now?**

B: Your greatest ability to elevate profitability via sales is by designing a New Patient Experience that's world-class, eliminates comparability with other practices, and increases same-day sales. This is accomplished by empowering your Treatment Coordinators with sales confidence and a strong focus on the human-to-human connection.

**Q: What is one myth about this industry or running a practice that you want to bust?**

B: There is greater growth potential when the Doctor isn't involved in every New Patient consultation.

**Q: What is one industry prediction you have for 2023?**

B: We will see more focus on educating and empowering team members' professional success to overcome employee burnout and high turnover.

**Q: What are you most excited about at NEXUS 2023?**

B: Connecting face-to-face with people who are eager to grow and learn.

**Q: What is your go-to karaoke song?**

B: No karaoke for me, lol

## NOTES



## LEVERAGING TECHNOLOGY TO CREATE RAVING FANS AND MASTER THE ADULT START

**SPEAKER: JANELLE BAUM**  
*Treatment Coordinator*  
*- Aszklar Orthodontics*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

Friday, February 10th 3:00-3:45pm  
*Spruce 3*

**Q: Brag about your company/practice in one sentence.**

J: It's the place you come to for laughter, online and in person!

**Q: What is your best piece of advice for practices right now?**

J: This too shall pass.

**Q: What is one myth about this industry or running a practice that you want to bust?**

J: Orthodontic treatment is purely cosmetic.

**Q: What is one industry prediction you have for 2023?**

J: An increase in plastic employees!

**Q: What are you most excited about at NEXUS 2023?**

J: Meeting new people and then coming home for a Buffalo Bills Superbowl Win!!!!

**Q: What is your go-to karaoke song?**

J: Born to be wild (Warning I'm tone deaf and I make up words)

# NOTES



## RECRUITING, HIRING, AND MAINTAINING A QUALITY TEAM

**SPEAKER: RACHEL KOPP**  
*Chief People Officer - OrthoFi*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 4:50-5:30pm  
*Spruce 1*

**Q: Brag about your company/practice in one sentence.**

R: The OrthoFi team is a once-in-a-lifetime, talented crew who is driven to accomplish amazing things together through a shared purpose of starting more smiles.

**Q: What is your best piece of advice for practices right now?**

R: Focus on controlling what you can control!

**Q: What is one myth about this industry or running a practice that you want to bust?**

R: With the rise of technology in the industry, the human element of the patient experience will be less critical. Not true! It's more important than ever.

**Q: What is one industry prediction you have for 2023?**

R: Those who focus on their people will thrive!

**Q: What are you most excited about at NEXUS 2023?**

R: I am excited to finally be back in person with so many amazing team members and customers and to meet some new faces.

**Q: What is your go-to karaoke song?**

R: "Africa", Toto.



# NOTES



## BUYING INTO CHANGE AND REFRAMING RESPONSIBILITIES

**SPEAKER: MICHAEL O'MUIREADHAIGH**  
*Director of Culture - OrthoFi*  
**AND RACHEL KOPP**  
*Chief People Officer - OrthoFi*

RECOMMENDED AUDIENCE:

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Friday, February 10th 2:15-3:00pm  
*Spruce 4*

**Q: Brag about your company/practice in one sentence.**

M: I always say that OrthoFi's mission, people, and company culture make it a place you are proud to tell your mom about.

**Q: What is your best piece of advice for practices right now?**

M: In a tight market, culture is the difference-maker. Invest in a great team you know will be an extension of your culture. This, along with the right tools, is the best way to offer an exceptional and consistent patient experience.

**Q: What is one myth about this industry or running a practice that you want to bust?**

M: That excellent clinical care is not the only cornerstone of a successful practice. Put as much thought into your front office experience as you do your in-chair experience.

**Q: What is one industry prediction you have for 2023?**

M: Increased consolidation of practices will come with the added challenge of consolidating team cultures.

**Q: What are you most excited about at NEXUS 2023?**

M: Connecting with old friends, making new ones, and learning from industry leaders about the future of orthodontics.

**Q: What is your go-to karaoke song?**

M: Love Shack - B52's

## NOTES



## MANAGING YOUR FINANCIAL RECORDS IN ORTHOFI

**SPEAKERS: CATHY JUGOVIC AND ANGIE MENEDEZ**

*Owners & Orthodontic Consultants  
- Embrace Your Practice  
Consulting Service*

RECOMMENDED AUDIENCE:

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Friday, February 10th 3:00-3:45pm  
*Spruce 4*

**Q: Brag about your company/practice in one sentence.**

C: You don't know what you don't know, but we know what you don't know, that's why you need our services!

A: I am a co-owner of a National Orthodontic Consulting company providing hands-on consulting to any office addressing all areas of your practice.

**Q: What is your best piece of advice for practices right now?**

C: Invest in hands-on training for you and your staff, get your systems and written protocols in place.

A: Make sure your team is always on point with their systems and protocols to guarantee your practice runs like a well-oiled machine.

**Q: What is one myth about this industry or running a practice that you want to bust?**

C: That your software programs will do the work for you. You need to know your software programs and you need to know how to use them properly. "Garbage in, garbage out"

A: There isn't any one way of doing things. Every practice has their own flow.

**Q: What is one industry prediction you have for 2023?**

C: That our industry will continue to grow faster with the types of technology we have to offer.

A: With the strides made in orthodontic technology every year, more doctors will center properly training their staff to keep up with the times.

**Q: What are you most excited about at NEXUS 2023?**

C: Seeing teams come together to network and learn more about orthodontics & have fun while doing it.

A: I look forward to discussing new patient starts and understanding how OrthoFi can transform your reports.

**Q: What is your go-to karaoke song?**

C: I don't do karaoke & you wouldn't want me to!! :)

A: Get Down Tonight by KC & The Sunshine Band.

## NOTES



## YOUR INSURANCE JOURNEY: A LOOK AT THE BEST PRACTICES FOR MANAGING THE ORTHOFI INSURANCE PARTNERSHIP

**SPEAKER: PAULA MCGINTY**  
*Treatment and Network Details  
Manager - OrthoFi*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Friday, February 10th 4:05-5:30pm  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

P: OrthoFi has the most dynamic treatment recommendation and fee presentation tools anywhere!

**Q: What is your best piece of advice for practices right now?**

P: "This is how we've always done it" isn't a good reason to not try something new.

**Q: What is one myth about this industry or running a practice that you want to bust?**

P: Insurance carrier websites are where patients go to find care.

**Q: What is one industry prediction you have for 2023?**

P: Insurance benefits will have lower lifetime maximums and more exceptions than ever before.

**Q: What are you most excited about at NEXUS 2023?**

P: Learning new things!

**Q: What is your go-to karaoke song?**

P: Dolly Parton, 9-5

## NOTES





## SERVE MORE PATIENTS THROUGH TIERED TREATMENT OPTIONS

**SPEAKER: MICHELLE SHIMMIN**  
*Owner - Shimmin Consulting*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Saturday, February 11th 8:30-9:15am  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

M: We are a fully comprehensive, customized approach to practice management consulting that delivers results!

**Q: What is your best piece of advice for practices right now?**

M: It's imperative you look to digital solutions to grow in less time and less space. For these solutions to be successful, you need to fully maximize every opportunity and adjust your protocols from what you've always done in the past.

**Q: What is one myth about this industry or running a practice that you want to bust?**

M: As a private practice owner, you can grow and thrive in 2023 and minimize your overhead through strategy and guidance in business solutions.

**Q: What is one industry prediction you have for 2023?**

M: Practices will buy-in and adopt, enthusiastically, a wider range of solutions for their practice, in understanding how to lower their overhead.

**Q: What are you most excited about at NEXUS 2023?**

M: I'm excited about the amazing collaboration for practice solutions with the greatest minds in the industry, to continue the enthusiasm of where our industry is rapidly moving to.

**Q: What is your go-to karaoke song?**

M: Africa - Toto

## NOTES



## LEVERAGING THE POWER OF OPEN CHOICE AND INTELLIGENT FLEXIBILITY

### SPEAKERS:

#### SARAH FUNSCH

*Director of Implementation & Adoption - OrthoFi*

#### ALLYSON GRIFFITH

*Treatment Coordinator - Joose Family Orthodontics*

### RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Saturday, February 11th 9:15-10:00am  
*Juniper*



### **Q: Brag about your company/practice in one sentence.**

S: Providing a service and solution that helps improve the lives of patients, staff, and business owners keeps me passionate about this mission and work.

A: Joose Family Orthodontics is committed to learning and changing in order to always provide an excellent patient experience.

### **Q: What is your best piece of advice for practices right now?**

S: Have a strategy and goals: communicate it, measure it, and commit to it.

A: TCs: Trust that lower down payments and pay in full will all balance out. As my Mamaw would say "It all comes out in the wash".

**Q: What is one myth about this industry or running a practice that you want to bust?**

S: Myth: We already know how patients will respond to things like interest, open choice, soft credit checks, online forms, method of payments on file.

A: Some assume orthodontic work is for esthetic purposes only and the orthodontist will always recommend treatment no matter what.

**Q: What is one industry prediction you have for 2023?**

S: We will see more demand for virtual options, for patient exams and practice staff.

A: We will still come out on top. People will seek orthodontic treatment.

**Q: What are you most excited about at NEXUS 2023?**

S: Bringing OrthoFi and OrthoBanc together to present valuable strategies and information to help everyone.

A: I am excited to learn from other professionals in the orthodontic world. Possible drops of wisdom I can use during consultations.

**Q: What is your go-to karaoke song?**

S: I've won two karaoke contests with Aerosmith's Dream On.

A: Probably anything Bon Jovi (classic 80's child).

## NOTES



## INSURANCE AND FINANCIAL COORDINATOR MASTER CLASS

### **SPEAKER: TINA BYRNE**

*Practice Management Consultant -  
Byrne Consulting*

### RECOMMENDED AUDIENCE:

FINANCIAL/INSURANCE ALTERNATIVE

Friday, February 10th 2:15-5:30pm

Saturday, February 11th 8:30-10:15am

*Spruce 2*

#### **Q: Brag about your company/practice in one sentence.**

T: Our depth of knowledge, development of sustainable systemic solutions, and philosophy of one size does NOT fit all provides the ideal supporting role to achieve change.

#### **Q: What is your best piece of advice for practices right now?**

T: Embrace Digital Transformation, Focus on the customer experience, Invest in yourself and your team, Stay agile and adaptive.

#### **Q: What is one myth about this industry or running a practice that you want to bust?**

T: You can measure everything that matters.

#### **Q: What is one industry prediction you have for 2023?**

T: The greatest success will come to those offering an exceptional experience as they know consumers don't stop buying in a recession - they are more selective with their spending.

#### **Q: What are you most excited about at NEXUS 2023?**

T: Surely it will be the meeting take-aways offered by the industry's brightest minds!

#### **Q: What is your go-to karaoke song?**

T: REALLY?? I am having nightmares I will be asked to sing!

## NOTES



## THE WINDMILLS I BUILT WHILE GROWING MY \$2M, 2 EMPLOYEE PRACTICE

**SPEAKER: DR. BOB SKOPEK**  
*Orthodontist - Skopek Orthodontics  
and ClearCut Orthodontics*

**RECOMMENDED AUDIENCE:** **ALL**  
Saturday, February 11th 10:45-11:30am  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

B: We provide specialist level orthodontics that is personalized, convenient and has been revolutionized using our proprietary, trademarked ROX system.

**Q: What is your best piece of advice for practices right now?**

B: Listen, observe and read everything you can. Then determine your “superpower” and use it to differentiate yourself from all of the noise.

**Q: What is one myth about this industry or running a practice that you want to bust?**

B: We can not only compete with, but can be far more successful than, any DTC, corporate entity, remote orthodontic associates or GP “doing ortho”

**Q: What is one industry prediction you have for 2023?**

B: Flat or reduced revenues which will inspire new creative private practice models that will slingshot the orthodontic specialty into the future.

**Q: What are you most excited about at NEXUS 2023?**

B: Sharing of creative non-clinical information.

**Q: What is your go-to karaoke song?**

B: Thunderstruck.



## NOTES



## NEXUS WRAP-UP: BUILD WINDMILLS, NOT WALLS

**SPEAKER: DR. JAMIE REYNOLDS**  
*Orthodontist, CPO, and Co-Founder, Orthodontic Partners*

**RECOMMENDED AUDIENCE:** ALL  
Saturday, February 11th 11:45-12:30pm  
*Juniper*

**Q: Brag about your company/practice in one sentence.**

J: The most philanthropic orthodontic practice in the Midwest.

**Q: What is your best piece of advice for practices right now?**

J: Focus on knocking the foundational basics of practice management out of the park and let the economists worry about the rest.

**Q: What is one myth about this industry or running a practice that you want to bust?**

J: The excuses you tell yourself about why your business isn't doing what you want are true.

**Q: What is one industry prediction you have for 2023?**

J: New patient flow will be hit or miss while we muddle through a challenging macro economic picture.

**Q: What are you most excited about at NEXUS 2023?**

J: Collaborating with the industry's best leaders.

**Q: What is your go-to karaoke song?**

J: The one someone else sings.

# NOTES

## SESSION DETAILS

### WHEN THE WINDS OF CHANGE BLOW, SOME BUILD WALLS...OTHERS BUILD WINDMILLS

**SPEAKER: DAVE TERNAN**

*Co-Founder & CEO - OrthoFi*

RECOMMENDED AUDIENCE: **ALL**

Friday, February 10th 8:00-8:15am

*Juniper*

#### DESCRIPTION

Our President, Dave Ternan, welcomes OrthoFi and OrthoBanc users to join us on the NEXUS journey. Throughout the next 2 days, we will help practices navigate the shifting winds of change: a Challenging Economy, Staffing/Capacity Concerns, Competition, and Consolidation. As the winds grow stronger, will your practice build walls – or windmills?

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### GET IT ON! WHAT IT MEANS TO LEAD THE WAY

**SPEAKER: KENI THOMAS**

*Keynote Speaker*

RECOMMENDED AUDIENCE: **ALL**

Friday, February 10th 8:15-9:15am

*Juniper*

#### DESCRIPTION

The Ranger motto is “Rangers Lead the Way”. Leadership is at the core of every skill developed as a Ranger. But they will never tell you leading others is dependent upon your rank the stripes on your sleeve, the position you have, or the title you hold. Leadership is the example we set for the people we serve. And we all serve somebody.

Keni Thomas' stories of Task Force Ranger are extraordinary examples of leadership. And, the stories are not about Generals, Colonels or Captains. For example, Private David Floyd was in charge of one person that day - himself. But his leadership and example saved lives.

In the pace of life, it is easy to lose perspective on our value to others. Make no mistake: Your presence is crucial! The individuals to the left and right are directly affected by the result of your actions. Each team is a puzzle with invaluable pieces.

There is no greater responsibility than to lead others! When you raise your hand or assume a task, you have put on the "uniform". This is a choice you have made. Duty follows that responsibility. It's up to you to deliver because your actions directly affect those around you. Keni Thomas helps attendees see themselves in the light of extraordinary. Because people who believe they have something to offer, who believe they have what it takes, will be the ones to rise to the occasion and step up in difficult times. It is the ultimate definition of LEADING THE WAY...

## THE FOUR WINDS OF CHANGE CHALLENGING OUR INDUSTRY AND THE METRICS EVERY PRACTICE SHOULD MONITOR

**SPEAKER: OLIVER GELLES**

*Chief Marketing Officer - OrthoFi*

RECOMMENDED AUDIENCE: **ALL**

Friday, February 10th 9:15-10:00am

*Juniper*

### DESCRIPTION

Change is inevitable. It is one of the few constants in our lives. Some would argue the orthodontic specialty has experienced more change in the last few years than in the past 15 or 20 years. Some of this change has been incremental and consistent. Some was ignited suddenly by the unprecedented societal shift brought on by COVID. Regardless of the causes, the effects of these changes are likely to persist in our future. This is the essence of our meeting theme, which is based on a Chinese proverb -- “when the winds of change blow, some build walls...others build windmills.”

OrthoFi’s CMO, Oliver Gelles, said “It really struck me how relevant this maxim is to our present, for the measure of a leader is taken in how they meet their challenges.” Today, we face four winds of change: Economy, Staffing/Capacity, Competition, and Consolidation/Affiliation. Like most challenges in life, each of these present potential threats but also potential opportunities for those leaders who choose to confront them head-on and build windmills to channel their energy. In this session, we’ll talk about the four winds and what OrthoFi data helped us reveal to create the context of this meeting.

# THE UNCERTAIN WINDS OF A CHALLENGING ECONOMY: USING DATA FROM THE PAST TO DRIVE OUR CURRENT ACTIONS SO WE ARE PREPARED FOR TOMORROW

**SPEAKER: CHRIS BENTSON**

*Partner - Bentson Cople and Associates*

**RECOMMENDED AUDIENCE:** ALL

Friday, February 10th, 10:20-11:15am

*Juniper*

## **DESCRIPTION**

The economy, staffing, consolidation, growth are all challenging Winds that every practice is facing. This lecture will focus on these four areas using current data and insights derived from thirty-five years of experience in orthodontics.

Takeaways will include:

- How and why to invest now for growth this year and be prepared for the coming high growth years of '24 and '25
- How your practice modality can be a solution for today and future staffing needs
- How deep does corporate consolidation go and Why orthodontics will always offer a great option for the independent and small group practice
- What metrics do you have to track in order to remain profitable as digital lab based products increase
- What are areas of growth in your practice that don't require "finding" a new patient....they are already there.

## PRACTICE STRATEGIES TO GENERATE ADDITIONAL NEW PATIENT EXAM CAPACITY

**SPEAKER: LEEANN PENICHE**

*Consultant and President - Peniche & Associates*

RECOMMENDED AUDIENCE: **ALL**

Friday, February 10th 11:15-12:00am

*Juniper*

### DESCRIPTION

We live in a fast-food, instant gratification nation...We want things fast and we want them now. When it comes to the new patient exam, we need to get them on the schedule faster and create additional exams and opportunities. Join expert consultant, LeeAnn Peniche, as she shares practice strategies to generate additional new patient exam capacity without sacrificing care. Learn how to schedule and increase types of new patient exams, create a variety of choices, work efficiently and speed up your case acceptance results!



## THE POWER OF A LIMITED TREATMENT STRATEGY TO COMPETE WITH DIRECT TO CONSUMER ALIGNERS

**SPEAKER: TRACY MARTIN**

*Founder & CEO - Straight Consulting*

RECOMMENDED AUDIENCE: **ALL**

Friday, February 10th 12:00-12:45pm

*Juniper*

### **DESCRIPTION**

Tracy Martin will explore what the “other guys” are offering and why shifting to a Limited Treatment strategy could set you up to compete directly with their treatment offers. “It is important that practices understand the patient psychology – especially for Millennials – on why they would choose a DSO or DTC Aligner company over a private ortho practice or OSO,” said Tracy. In this session Tracy will provide a strong case for offering Limited Treatment, explore the ideal way to present this option, and discuss some common mistakes practices make that could sabotage their efforts toward implementing this change.

## USING TECHNOLOGY TO CREATE EXTRA CLINICAL CAPACITY

**SPEAKER: DR. BILL DISCHINGER**

*Orthodontist - Dischinger Orthodontics*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 2:15-3:00pm

*Juniper*

### DESCRIPTION

In this session Dr. Dischinger will share the story of his practice's transformation over the past few years from a traditional metal, in person practice, to a heavy aligner virtual practice. He will show the technology the Dischinger Team has utilized to accomplish this transition and tell how their practice still delivers exceptional clinical results with superior customer service.

## LEVERAGING YOUR TIME THROUGH DOCTORLESS CONSULTS

### **SPEAKER: JILL ALLEN**

***Owner & Founder | Practice Management Consultant  
- Jill Allen & Associates***

### RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 3:00-3:45pm  
*Juniper*

### **DESCRIPTION**

Doctorless exams. Virtual treatment coordinators. Yup, you read that right. I am sure those are words you never thought you would see in the same sentence. The fact of the matter is that doctorless exams and virtual treatment coordinators are not only happening, they're profitable, and patients love them. It might take a few minutes for those words to roll off your tongue, but with the right tools and strategies, you will be embracing this mindset and reaping the benefits in your practice.

Learning Objectives:

1. Uncover the different ways that a doctorless exam can be executed in your practice
2. Maximize your schedule and increase production
3. Empower your treatment coordinator and leverage time management to ensure practice success

## PREDICTABLE NEW PATIENT REVENUE STARTS WITH PERFECTING THE NEW PATIENT PHONE CALL

**SPEAKER: DR. AMOL NIRGUDKAR**  
*CEO - Patient Prism*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 4:05-4:50pm  
*Juniper*

### DESCRIPTION

With the economic winds of change blowing, it is more important than ever that you stop the leakage occurring during the new patient phone call. How many “at bats” are you missing because the potential patient never schedules? Spending more money on marketing to make the phones ring doesn’t work if you haven’t mastered that initial call. Who is calling? What are they requesting? Will they schedule with you before calling your competition? Every practice should be asking these questions! In this session, we will review some eye-opening metrics about potential patient leakage by leveraging the data from Patient Prism’s AI powered platform, and we will explore strategies for new patient phone call mastery.

# THE TRUTH ABOUT PRACTICE VALUATION: HOW TO OBTAIN MAXIMUM VALUE WHEN IT IS TIME TO SELL YOUR PRACTICE

**SPEAKER: CHARLES LORETTO**  
*Partner - Cain Watters and Associates*

RECOMMENDED AUDIENCE:

DOCTOR

Saturday, February 11th 8:30-10:15am  
*Spruce 1*

## DESCRIPTION

New industry trends, inflation and tax policy changes are dramatically impacting the dentistry business; coupled with the increase in private equity offers, there's a lot being thrown at dental practice owners.

You must decide how to maximize the largest asset you own—your practice. During times of uncertainty and opportunity, it's more important than ever to have a financial plan that can guide you toward your goals. This session discusses how valuations and transitions can impact your long-term financial plan. It looks through the lens of both the associate and the owner that wants to know their options. Participants will receive a thorough outline of data points to analyze when contemplating the sale of a portion or all of your practice when the time is right. By understanding the true value of a dental practice, you will walk away equipped to look at offers skeptically and gain realistic expectations of a practice transition.

Upon completion of this session, attendees should be able to:

- Understand how private equity or a DSO values the EBITDA of the dental practice.
- Create a personal and business financial plan that will position your practice to maximize its value when the time is right.

## MASTER THE 45-MINUTE, DOCTORLESS EXAM WITH SALES COACH BROOKE OLIPHANT

**SPEAKER: BROOKE OLIPHANT**

*Founder - Straight-Up Sales Orthodontic Coaching*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

Friday, February 10th 2:15-3:00pm

*Spruce 3*

### DESCRIPTION

New industry trends, inflation and tax policy changes are dramatically impacting the dentistry business; coupled with the increase in private equity offers, there's a lot being thrown at dental practice owners.

## LEVERAGING TECHNOLOGY TO CREATE RAVING FANS AND MASTER THE ADULT START

**SPEAKER: JANELLE BAUM**

*Treatment Coordinator - Aszkler Orthodontics*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

Friday, February 10th 3:00-3:45pm  
*Spruce 3*

### DESCRIPTION

If your practice hasn't mastered the Adult Same Day Start, you could be missing out on thousands of dollars of revenue. OrthoFi data shows that the average new patient sees 2-3 orthodontists before making a purchase decision. This is especially true for adult patients, who are much less likely to convert beyond the initial visit.

Don't miss this high energy presentation by Treatment Coordinator Janelle Baum as she shares tips and tricks on how to align your adult patient onboarding processes to effectively execute Same Day Starts in your practice. Janelle will share technology strategies and recipes for success that enable practices convert more adult patients in the office or at home. She will share new patient phone call strategies and examples of how video technology can be used to engage busy adults while maximizing clinical, in-office capacity, value when the time is right.

## RECRUITING, HIRING, AND MAINTAINING A QUALITY TEAM

**SPEAKER: RACHEL KOPP**  
*Chief People Officer - OrthoFi*

RECOMMENDED AUDIENCE:

DOCTOR

Friday, February 10th 4:50-5:30pm  
*Spruce 1*

### DESCRIPTION

In the last 5 years, the OrthoFi team has welcomed more than 600 people, and turned the tides of high attrition and low engagement through a series of intentional cultural changes. We'll share lessons learned along the way and workshop through best practices for how to grow and scale your team, including recruiting and interview processes to help find and retain your own "Culture Adds".



## BUYING INTO CHANGE AND REFRAMING RESPONSIBILITIES

**SPEAKER: MICHAEL O'MUIREADHAIGH**  
*Director of Culture - OrthoFi*  
**AND RACHEL KOPP**  
*Chief People Officer - OrthoFi*

### RECOMMENDED AUDIENCE:

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Friday, February 10th 2:15-3:00pm  
*Spruce 4*

### DESCRIPTION

The doctor has decided to implement a new software tool. Again. Your day-to-day processes will be changing. Again. Join us for a discussion on how to rise to the occasion, how to add to your own happiness and the results of your practice rather than take away from it. We'll provide tactical tips and thoughtful ideas for how to not only survive the change but to thrive.

## MANAGING YOUR FINANCIAL RECORDS IN ORTHOFI

**SPEAKER: CATHY JUGOVIC AND ANGIE MENENDEZ**  
*Owners & Orthodontic Consultants*  
*- Embrace Your Practice*  
*Consulting Service*

RECOMMENDED AUDIENCE:

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Friday, February 10th 3:00-3:45pm  
*Spruce 4*

### DESCRIPTION

Join the Embrace your Practice Consulting Team as they present an informative lecture on how Orthofi manages payments and how you can help maximize collections for your practice. In this session, Cathy and Angie will discuss creating an efficient system to support your partnership with OrthoFi and review the role you play in the management of delinquent patients. (This is a session for the Practice User who manages the financial partnership with OrthoFi.)

# YOUR INSURANCE JOURNEY: A LOOK AT THE BEST PRACTICES FOR MANAGING THE ORTHOFI INSURANCE PARTNERSHIP

**SPEAKER: PAULA MCGINTY**

*Treatment and Network Details Manager - OrthoFi*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Friday, February 10th 4:05-5:30pm

*Juniper*

## DESCRIPTION

We will use this time to look at our patient's insurance journey from pre-scheduling to claims submission. In this session we will explore how your relationship with insurance carriers may be affecting your practice health, the best practices for presenting patients with accurate out-of-pocket responsibility, and how to use the OrthoFi Treatment Details page to maximize reimbursement.

## SERVE MORE PATIENTS THROUGH TIERED TREATMENT OPTIONS

**SPEAKER: MICHELLE SHIMMIN**  
*Owner - Shimmin Consulting*

RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Saturday, February 11th 8:30-9:15am  
*Juniper*

### DESCRIPTION

Learning Topics: Tiered treatment options and pricing allows you to serve more patients that directly meet their unique needs and desires. I will discuss the importance of implementing treatment options in order to provide solutions for patients that may not be interested in full treatment. We need to be setting up the options within your practice to be able to meet more patients where they are and have options that meet their needs. I will talk about reasons why this strategy is going to be an important part of your future growth opportunities within your practice, while providing a better optimized pricing structure for your patients.

## LEVERAGING THE POWER OF OPEN CHOICE AND INTELLIGENT FLEXIBILITY

### **SPEAKERS:**

#### **SARAH FUNSCH**

*Director of Implementation & Adoption - OrthoFi*

#### **ALLYSON GRIFFITH**

*Treatment Coordinator -  
Joose Family Orthodontics*

### RECOMMENDED AUDIENCE:

TREATMENT COORDINATOR

FINANCIAL COORDINATOR/INSURANCE COORDINATOR

Saturday, February 11th 9:15-10:00am

*Juniper*

### **DESCRIPTION**

Powered by the analysis of over a million payment plans, the slider is more than a fee presentation tool; It's smart!

OrthoFi's slider uses a powerful algorithm, as well as proven incentives and gamification to maximize growth, cashflow, and default risk.

This session will cover the intelligence of the tool, the data that busts myths, and how to make it work for you in the consult room.

## INSURANCE AND FINANCIAL COORDINATOR MASTER CLASS

### **SPEAKER: TINA BYRNE**

*Practice Management Consultant - Byrne Consulting*

### RECOMMENDED AUDIENCE:

FINANCIAL/INSURANCE ALTERNATIVE

Friday, February 10th 2:15-5:30pm

Saturday, February 11th 8:30-10:15am

*Spruce 2*

### **DESCRIPTION**

This is your chance to experience Tina's highly reviewed Insurance and Accounts Receivable MasterClass. In this course, Tina Byrne walks through everything you need to know for a workable and rewarding approach to managing insurance processes, as well as a fail proof way to mastering delinquency in the practice. Practice managers, insurance and financial coordinators will learn how to simplify the insurance and accounts receivables challenges weighing down your office and will walk away with tons of practical tips and tricks on working with both in and out-of-network providers. This live, interactive course guarantees to provide the insights, knowledge, and strategies needed to get the most out of your insurance and accounts receivables to help your practice thrive. (This course is primarily for non-OrthoFi Users, but all attendees are welcome.)

## THE WINDMILLS I BUILT WHILE GROWING MY \$2M, 2 EMPLOYEE PRACTICE

### **SPEAKER: DR. BOB SKOPEK**

*Orthodontist - Skopek Orthodontics  
and ClearCut Orthodontics*

RECOMMENDED AUDIENCE: **ALL**

Saturday, February 11th 10:45-11:30am

*Juniper*

### **DESCRIPTION**

When the OrthoFi team considered speakers for NEXUS, Dr. Bob Skopek immediately came to mind. Dr. Skopek, is a clear aligner orthodontist with a strong tiered treatment program. He has created a hyper efficient business model by using Skopek Remote to create additional clinical capacity and via the outsourcing of many team tasks. Join Dr. Skopek as he shares his journey, his inspiration, and specific examples of how he is navigating a soft economy and the staffing crisis.

## NEXUS WRAP-UP: BUILD WINDMILLS, NOT WALLS

**SPEAKER: DR. JAMIE REYNOLDS**

*Orthodontist, CPO, and Co-Founder, Orthodontic Partners*

RECOMMENDED AUDIENCE: **ALL**

Saturday, February 11th 11:45-12:30pm

*Juniper*



## NOTES

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