

Dental/DSO Industry Newsletter

Dental/DSO Industry Market Intelligence

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CALENDAR OF EVENTS

Greater New York Dental Meeting

NOVEMBER 28–DECEMBER 3, 2025
New York

The 101st Annual Greater New York Dental Meeting invites attendees to participate in one of the largest Dental Congresses in the world. At the 2024 Meeting, the conference hosted over 37,631 dental professionals, including:

Dentists – 13,470

Dental Assistants – 2,200

Dental Hygienists – 2,226

International Countries – 148

For more information, please click [here](#).

Yankee Dental Congress 2026

JANUARY 29–31, 2026
Boston, MA

This large regional event, held at the Thomas Michael Menino Convention and Exhibition Center (formerly BCEC), offers over 100 in-person lectures, hands-on workshops, an extensive expo hall and networking opportunities. It attracts professionals from across the Northeast and supports DSOs with updates on clinical innovations, practice management and technology adoption.

For more information, please click [here](#).

American Academy of Dental Group Practice (AADGP) 2026

FEBRUARY 4–6, 2026
Austin, TX

The AADGP 2026 event will be held February 4-6 in Austin, Texas (Hyatt Regency Lost Pines Resort and Spa). The program is described as aimed at dental-group practice professionals (including multi-location and DSO-models) and offers collaborative workshops, expert speakers and sessions on growth, operational efficiency and leadership in multi site settings. Use of discount code “gdnw2026” is noted in the listing, which implies alignment with wider DSO community channels.

For more information, please click [here](#).

Women in DSO® Empower & Grow 2026

MARCH 5–7, 2026
Las Vegas, NV

This annual conference, organized by Women in DSO®, will be held March 5-7, 2026, at Caesars Palace, Las Vegas, and is open to all leaders in dental service organizations (DSOs), not exclusively women. The agenda emphasizes leadership development, organizational growth and strategic direction for dental-group professionals (which includes DSO executives, specialty leadership, and operations). According to the event page, attendees will engage in dynamic workshops, expert panels and networking tailored to growing multi location practices and group models. Registration is open; sponsor/exhibit opportunities announced.

For more information, please click [here](#).

IADR/AADOCR/CADR General Session & Exhibition

MARCH 25–28, 2026
San Diego, CA

Taking place at the San Diego Convention Center, this combined meeting of three dental research associations brings together clinicians, researchers and industry players. The exhibit hall highlights cutting-edge dental technologies and clinical research advancements relevant to DSOs seeking to adopt evidence-based innovations.

For more information, please click [here](#).

Midwest Dental Conference 2026

APRIL 23–26, 2026
Kansas City, MO

Hosted by the University of Missouri–Kansas City School of Dentistry, this conference attracts attendees from across the Midwest. It combines educational sessions, product exhibits and networking designed to support DSOs' operational growth, multi site practice management and patient care excellence.

For more information, please click [here](#).

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CALENDAR OF EVENTS (cont'd)

2026 ADSO Summit

JUNE 15–17, 2026

Chicago, IL

This major three-day event, organized by the Association of Dental Support Organizations (ADSO), is marketed as “Dentistry’s Main Event for the DSO industry’s top leaders and their partners.” The agenda promises networking, thought leadership and innovation sessions geared toward large-scale DSOs, their executive teams and strategic partners. The summit emphasizes peer-connections and meaningful conversations about the most pressing issues in the dental-group/DSO space (including growth strategy, operational scaling, vendor relationships and leadership). Because it’s several months away, registration, sponsorship and program details are still forthcoming.

For more information, please click [here](#).

Florida Dental Conference 2026

JUNE 25–27, 2026

Orlando, FL

Situated at the Gaylord Palms Resort & Convention Center in Orlando/Kissimmee, this event offers comprehensive continuing education, a large exhibit hall featuring new dental products and services, and business forums. The conference addresses specific challenges and opportunities for DSOs in fast-growing markets like Florida.

For more information, please click [here](#).

The Dental Exchange – First Ever Annual Dental Industry Event 2026

OCTOBER 8–10, 2026

Grapevine, TX

This upcoming event is billed as “The first ever Annual Dental Industry Event” and will be held in Grapevine, Texas (Gaylord Texan). According to the listing, it intends to bring “all of dentistry together” but is included in the DSO-events category on the calendar, signaling relevance to multi-location practices, DSOs and their partners.

For more information, please click [here](#).



Please contact us if you would like to post information regarding our upcoming events or if you’d like to guest author an article for this newsletter.

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INDUSTRY SPOTLIGHT

Vince Nardone Featured on The Lifestyle Practice Podcast

[Vince Nardone](#), Co-Chair of Benesch's Dental/DSO Industry Group, was recently featured on *The Lifestyle Practice Podcast* with host and practice owner, Dr. Matt Vogt. In the episode, "The Top Mistakes Dentists Make in Practice Acquisitions,"

Vince discusses common pitfalls in the acquisition process, key considerations, the importance of creating a successful profile, how to evaluate purchase prices and terms, and the critical role real estate plays in a transaction.

Watch the episode [here](#).



About Vince

Vince focuses his practice exclusively on the dental industry, advising dentists, dental practices, DSOs, dental schools, labs and investors active in the dental sector. His experience includes succession planning, mergers and acquisitions, valuations and financial modeling, tax projections, and regulatory guidance. He also supports clients with day-to-day operational needs, ranging from board investigations and associate agreements to real estate matters, employment issues, and strategies for strengthening practice growth and culture.

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KEY FINDINGS

Integration of Medical Services and Regulatory Shifts in Dentistry

DSOs and dental providers are embedding medical care into dental settings while navigating new state-level insurance reforms.

U.S. DSOs and multi location dental providers are increasingly experimenting with models that integrate medical care into traditional dental settings. For example, Pacific Dental Services (PDS Health) [launched](#) a new division, PDS Health Medical, to embed medical clinicians and coordinate referral pathways within dental offices, enabling a more connected approach to whole-person care.

These operational changes include leveraging technology to link medical and dental records and coordinating cross-discipline referrals, which may influence workflow, vendor agreements and compliance requirements. Concurrently, legislative activity is reshaping the insurance landscape. The ADA [reported](#) that 37 dental-insurance reform laws passed in 2025 across 18 states, covering areas such as dental loss-ratio reporting, assignment-of-benefits rules, virtual payment regulations and provider credentialing improvements.

States such as Washington have implemented specific reporting requirements for in-state payment data (effective July 27, 2025, under SB 5351, with carriers required to file Washington-only dental revenue/payment data by April 1 each year), reflecting a regulatory focus on transparency and consumer protection. At the programmatic level, [Texas Medicaid](#) is updating the Children with Special Health Care Needs dental services program effective December 1, 2025, introducing new reimbursable procedure codes, teledentistry provisions and limits on prophylaxis and fluoride services. Taken together, these initiatives underscore that DSOs and large dental groups must consider operational integration, compliance and payer rules as part of strategic planning.

Sources: DrBicuspid, ADA News, TMHP

DSO Consolidation and Private Equity Investment Driving Market Scale

Growing market size, financing pressures and private equity capital are shaping consolidation strategies across DSOs.

The [U.S. DSO market](#) continues to expand, with projections estimating growth from \$44.7 billion in 2025 to \$196.5 billion by 2034, reflecting a 17.9% compound annual growth rate. Consolidation remains a defining feature of the sector, driven by DSOs seeking efficiency gains, centralized non-clinical operations and stronger negotiating leverage with suppliers and payers. Workforce dynamics are reinforcing this shift as well, with [ADA data](#) indicating that more than 25% of dentists within 10 years of graduation now work in DSOs, underscoring how consolidation aligns with the career preferences of early-career clinicians facing high educational debt.

Macroeconomic pressures are rewriting expansion strategies. Group Dentistry Now [reports](#) that high interest rates have pushed practice acquisition activity to historic lows, prompting DSOs to prioritize operational efficiency, revenue cycle optimization and selective growth over broad-based expansion. While financing conditions remain challenging, private equity investment has not slowed. These forces together illustrate a sector navigating financial pressures while continuing to rely on consolidation and institutional capital to scale multi location practices and stabilize staffing.

Sources: Globe Newswire, ADA New, Group Dentistry Now

GENERAL DENTISTRY NEWS

OCTOBER 10, 2025

37 Dental-Insurance Reform Laws Passed So Far in 2025

The American Dental Association's reporting lists 37 new dental-insurance reform laws enacted across 18 states during 2025. The most addressed topics this year include state-level dental loss-ratio reporting rules, limits or requirements around virtual credit-card payment practices, assignment-of-benefits rules and improvements to provider credentialing processes. The ADA item gives state examples (for example, changes to Washington's dental loss-ratio reporting to require only in-state payment data) and notes that more than 120 related legislative proposals were filed in the year.

Source: ADA News

OCTOBER 17, 2025

Changes to CSHCN Dental Services Effective December 1, 2025

Effective for dates of service on or after December 1, 2025, the Texas Children with Special Health Care Needs (CSHCN) Services Program will implement a series of changes to its dental-benefit criteria, first dental home services, dental prophylaxis services, teledentistry services (including synchronous teledentistry) and reimbursement. Specifics include:

- Procedure code D9994 becomes a benefit for clients aged 6 months through 35 months; claims may be paid to dentists, federally qualified health centers (FQHCs) and dental-group providers.
- Procedure code D9995 becomes a benefit under the program, also payable to those provider types for services rendered in-office.
- For "First Dental Home" (FDH) providers: oral examination, caries risk assessment and additional services (e.g., D0415 for ≤3 yrs) may be reimbursed when bundled into FDH visits.
- Dental prophylaxis codes D1120 and fluoride application D1206 may be performed every 60 days for clients aged 6-35 months when provided on the same date as D0145; for clients aged ≥36 months, these codes will be limited to one service every six months.
- Code D1208 will also be limited to once every six months by any provider.

Source: TMHP (Texas Medicaid & Healthcare Partnership)

OCTOBER 24, 2025

PDS Health Launches "PDS Health Medical" to Embed Medical Care in Dental Settings

Pacific Dental Services' health arm (branded as PDS Health) launched a new division called PDS Health Medical intended to integrate medical services into dental practices. The company's aim is to place or coordinate medical clinicians and referral pathways inside dental settings to enable "connected" whole-person care. Reporting describes the initiative as a new business unit and notes that the model involves embedding clinicians, coordinating referrals between dental and medical teams, and using technology to connect records and workflows. The piece highlights operational implications the company cited, e.g., coordinated care pathways and cross-discipline referrals.

Source: DrBicuspid

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GENERAL DENTISTRY NEWS (cont'd)

NOVEMBER 7, 2025

U.S. Dental Services Organization Market to Drive USD \$196.5 Billion, Growing at 17.9% CAGR by 2034

A market-research release estimates the U.S. Dental Services Organization (DSO) market size at USD \$44.7 billion in 2025 and projects growth to ~\$196.5 billion by 2034, at a compound annual growth rate (CAGR) of ~17.9%. The drivers cited include: growing oral-health awareness, an aging population with higher utilization, industry consolidation (scale economies) and demand for efficiency in non-clinical operations. The “human resources” segment (non-clinical support services) is expected to witness the fastest growth and general dentists currently hold the largest share of the end-use segment.

Source: Globe Newswire

DSO EXPANSION & CONSOLIDATION

NOVEMBER 3, 2025

HPI: More New Dentists Affiliated with DSOs

Over 25% of dentists within 10 years of graduation are now affiliated with DSOs, much higher than older cohorts. This trend reflects DSOs’ appeal in providing administrative support and financial stability, especially for younger dentists burdened by student debt. The report underscores the growing influence of DSOs on workforce dynamics and practice ownership models.

Source: ADA News

NOVEMBER 11, 2025

Why DSOs Must Play Different in a High-Interest Rate Economy

This article explores how DSOs are adapting to a high-interest rate environment that has significantly increased the cost of debt. Traditional growth strategies—acquiring practices and centralizing operations—are becoming unsustainable as financing costs double. Acquisition volumes have dropped to historic lows and some DSOs face severe financial strain. The piece emphasizes the need for operational efficiency, outsourcing nonclinical roles and rethinking the old playbook to survive in today’s market.

Source: Group Dentistry Now

OTHER DSO NEWS

NOVEMBER 7, 2025

Beyond Pilot Fatigue: The Rise of ‘Promise Fatigue’ in Health Tech

This article analyzes a specific operational challenge in the DSO/vendor ecosystem: what the author terms “promise fatigue.” Key takeaways:

- “Promise fatigue” refers to DSOs and their vendors (particularly tech/AI firms) facing a gap between vendor promises (large performance gains, fast roll-outs) and actual delivery or measurable ROI. The article notes that although innovation is welcome, many pilots never advance to production or scale.
- Examples include: vendors showing 30-50% uplift claims without substantiated baselines; sandbox demos that don’t reflect live workflows; “we have API/partnership” language when the integration isn’t built; pilots ending just prior to major change-management or scaling phases.
- The article outlines a “playbook” for DSOs and vendor-partners to improve outcomes, emphasizing Clarity (define the problem, target use-cases), Transparency (well-defined pilot KPIs, cost of ownership, data access), and Truthfulness (clear scope of what the tech can/cannot do now, prove security/compliance).
- For DSOs, the article suggests that choosing and executing vendor partnerships now requires disciplined procurement, integration planning, ROI measurement and readiness to scale. For legal/compliance teams, implications include vendor-contract terms (e.g., pilot conditions, metrics, performance guarantees), data/security vetting and contract scalability clauses.

Source: Group Dentistry Now

PARTNERSHIPS AND INNOVATION

OCTOBER 21, 2025

A Revolution Underway: AI in Dental Care

This article reports that major U.S. DSOs increasingly adopt AI, finding as many as “eight of the 10 largest DSOs have implemented AI platforms.” Between 2022 and 2025, the Food and Drug Administration cleared eight dental AI products. The piece describes how AI is being applied to diagnostics (radiographs), treatment planning and even insurance/administrative workflows in the dental context. It emphasizes the scale-driven need for standardization in DSOs (multiple locations, multiple clinicians) and how AI provides tools to reduce variability, improve outcomes and achieve operational efficiencies.

Source: Forbes Councils

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PARTNERSHIPS AND INNOVATION (cont'd)

OCTOBER 24, 2025

Adoption is Key Challenge When Introducing New Dental Technology, Experts Say

This article reports on a panel discussion held Oct. 10 at the ADA Forsyth Institute “dentech 2025” event, where dental-industry investors and innovators discussed the gap between technology development/approval and actual adoption in dental practices. Key points:

- Panelists emphasized that after new devices or software have regulatory clearance and funding, the larger barrier is integrating them into existing provider workflows and convincing clinicians to change behaviors. For example, Dr. Thomas Flemmig noted: “behavioral change, which seems very simple, is actually a tremendous barrier in practices to adopt new technology.”
- Xin Sylvia He (managing partner of Hyfinity Fund) said effective innovation must integrate smoothly into practice management systems rather than exist as a standalone add-on.
- Daniel Burke, Chief Enterprise Strategy Officer at PDS Health, stated that innovations must either incrementally improve existing workflows or fully disrupt current systems; incremental improvements are often more viable: “If you’re incrementally making things better ... you fit into our flow and our operational flow.”

Source: ADA News

NOVEMBER 7, 2025

AI Platforms Enhance Patient Acquisition and Retention at Scale

AI-driven innovations in DSOs are driving more dynamic patient acquisition, personalized marketing and automation of insurance/claims processing. Market leaders are using these tools to identify high-value patient segments, improve campaign ROI, predict churn and optimize same-store growth across networks. This enables DSOs to navigate competition more efficiently and build scalable business models supporting large multi location practices.

Source: Blog.sikka.ai

LITIGATION

NOVEMBER 3, 2025

\$1.225M First Choice Dental settlement Resolves Class Action Over Oct. 2023 Data Breach

First Choice Dental (FCDG Management, LLC) agreed to a \$1.225 million settlement to resolve a class action arising from an October 2023 cyberattack that allegedly compromised patient data. The settlement received preliminary court approval on September 30, 2025, and covers roughly 159,145 U.S. individuals potentially affected. Under the settlement, class members may submit claims for documented out-of-pocket losses (up to \$6,000) or obtain a \$50 cash payment without proof; all claimants who apply by the claims deadline are also eligible for three years of identity/credit monitoring services. The notice and settlement website provide claim deadlines (claims due Jan 28, 2026) and a final approval hearing date (Jan 12, 2026). The piece summarizes the alleged scope of compromised data (names, dates of birth, Social Security numbers, driver's license numbers, financial account information and medical history) drawn from court documents.

Source: [ClassAction.org](https://www.classaction.org)

NOVEMBER 10, 2025

ADA Urges Wisconsin Insurance Regulator to Scrutinize Delta Dental of Wisconsin's Acquisition of Cherry Tree Dental

The American Dental Association formally voiced opposition to Delta Dental of Wisconsin's acquisition of Cherry Tree Dental and asked the Wisconsin Office of the Commissioner of Insurance to evaluate the transaction's potential effects on patients and providers. The ADA letter raises concerns about insurer ownership of a large dental practice chain—specifically potential conflicts of interest when an insurer would simultaneously set reimbursement rules and employ clinicians—and possible effects on competition, patient choice and clinical independence. Delta Dental notified its provider network in July that it had purchased Cherry Tree and filed corporate reorganization paperwork with the state regulator. The ADA said the proposed corporate structure (as described by Delta) did not meaningfully mitigate conflict-of-interest risks and urged careful regulatory review. State and national dental groups (and some watchdogs) have asked federal and state enforcers to review the deal; at the time of reporting the Office of the Commissioner of Insurance was reviewing Delta Dental's filings.

Source: [ADA News](https://www.ada.org)

STAFFING

OCTOBER 16, 2025

The Group Dentistry Now Podcast Looks at Staffing, Front-Office Processes and People

This podcast episode focuses on operational fixes DSOs use to address staffing pressures, especially front-office and patient-access pain points. Key points:

- Guests cite data showing high missed-call rates (examples given: industry data points such as ~38% missed calls in some practices) and argue that answering/handling calls consistently is a first-order staffing/productivity issue. The episode frames missed calls as a direct revenue leak and says standardizing phone-handling processes is a scalable way DSOs can protect revenue even when hiring is hard.
- Speakers repeatedly emphasize that technology alone won't fix staffing problems without clear processes and staff buy-in exist. They advise setting a standard operating procedure for front desk tasks, then using training and monitoring (and only then automation/tech) to scale performance across acquired practices.
- The discussion highlights call intelligence and monitoring tools that identify which practices or employees meet standards and which need coaching, enabling centralized training rather than immediate hiring. That reduces marginal staffing needs and improves productivity of existing teams.
- The episode repeatedly links staffing variability to integration risk when rolling up practices; acquiring groups often inherit inconsistent front-office skill sets that must be standardized quickly to realize deal value. The hosts recommend DSO leaders prioritize onboarding and process standardization as part of post-close integration.

Source: GroupDentistryNow

OCTOBER 28, 2025

'Together We're Creating That Future' –ADA President Addresses Workforce and Future of Dentistry at SmileCon

This ADA News report covers ADA President-elect Richard Rosato's address to the House of Delegates at SmileCon and highlights workforce issues as one of the major challenges the profession faces. Key points:

- Dr. Rosato explicitly lists "workforce" among the major external pressures the ADA must respond to, alongside technology, AI and changing care models. He frames workforce shortages as part of a broader transition in how dentistry is organized and delivered.
- The address references the need to strengthen dental education, support provider wellness (mental health) and prepare for "the future", anticipating changes in roles, scopes and work models that will affect staffing and recruitment.
- The speech urges collaboration across stakeholders (state societies, educators, DSOs, specialty groups) to address staffing and training shortfalls, and to ensure clinical autonomy and patient trust are preserved as models evolve.
- While not a policy announcement, the address situates workforce concerns in the context of the ADA's strategic priorities, suggesting the Association will continue to prioritize resolutions and initiatives that affect licensing pathways, allied-education capacity and workforce pipeline development.

Source: ADA News

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STAFFING (cont'd)

NOVEMBER 5, 2025

The Group Dentistry Now Podcast Looks at AI, Virtual Reception and Workforce Implications

This Nov. 5 episode centers on how AI and “virtual reception” solutions are being used in U.S. dental groups to address staffing pressures and improve patient access. Key Points:

- Panelists describe using AI-driven call answering and voice intelligence tools to reduce front desk workload and missed calls. The conversation is explicit that these tools are intended to augment rather than immediately replace staff and that patient preference for human interaction limits full automation today.
- Guests emphasize again that technology must be layered using a stable process and trained staff to deliver predictable results, otherwise AI adoption stalls. That mirrors staffing strategy: free existing staff for higher-value clinical work while automating repetitive administrative tasks.
- The episode links investment in automation to staff retention strategies, automating low-value tasks can make jobs more satisfying and may reduce churn among front office and clinical team members. The speakers also discuss the economics: replacing some functions with tech can reduce reliance on temporary hires or overtime during hiring gaps.
- Hosts note practical rollout challenges (call handling expectations, patient perception, integration with practice management systems) and recommend pilots with clear KPIs before full scale deployment. They also discuss how DSOs measure “time-to-value” for tech rollouts and the importance of onboarding and coaching for staff adapting to augmented workflows.

Source: GroupDentistryNow

For more information regarding our Dental Industry/DSO Practice, or if you would like to contribute to the newsletter, please contact:

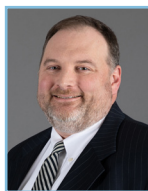


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