

**Practice Management Course**

**August 10, 2019**

Conrad Hotel Chicago  
101 East Erie, Chicago, IL 60611

***Promoting Excellence in Prosthodontic Education***

**ACP Practice Management Course**  
**August 10, 2019**  
Conrad Hotel Chicago  
101 East Erie, Chicago, IL 60611  
Meeting Room: Churchill, 19<sup>th</sup> Floor  
***Promoting Excellence in Prosthodontic Education***

**AGENDA**

**Saturday, August 10, 2019**

- 7:30 a.m. Continental Breakfast & Registration**
- 8:00 a.m. Practice Transitions: Understanding Your Entry or Exit Options**  
Fred Heppner
- 9:30 a.m. Coffee Break**
- 10:00 a.m. Marketing Your Practice: Setting Specialists Apart Online**  
Laura Nadler, MA
- 11:00 a.m. Human Resources: Avoiding Legal Minefields While Motivating Your Team**  
Ali Oromchian, JD, LLM
- 12:00 p.m. Buffet Lunch**
- 1:00 p.m. The Dentist's Guide to Medical Billing**  
Christine Taxin
- 2:30 p.m. Social Media to Grow Your Practice**  
Rita Zamora
- 3:30 p.m. Coffee Break**
- 4:00 p.m. Essential Insurance, Investments, and Planning Strategies for Prosthodontists**  
Shawn Johnson
- 5:00 p.m. Networking Reception**

## **Saturday, August 10, 2019**

8:00 a.m. - 9:30 a.m.

Practice Transitions: Understanding Your Entry or Exit Options

Fred Heppner

Transitions Consultant, Business Management Advisor, Speaker, Author

### **Learning Objectives:**

At the conclusion of this session, attendees should be able to:

- Express knowledge in how a Prosthodontic practice is valued.
- Sort out the various options that would likely be best for them in transitioning in or out of private practice.
- Build their own basic transition strategies.

**Session Descripton:** This course will help prepare a Prosthodontist who is contemplating transitioning out of private practice, or one who is considering transitioning into private practice. Business Valuation methods, due diligence, strategic planning, and various options for transitions will be discussed.

**Teaching Method(s):** Didactic presentation with question and answers.

**Speaker Bio:** Fred Heppner has been serving the dental industry since 1983. With his experience and knowledge in Dental Practice Management & Practice Transitions, he has helped dentists enhance their practices, value their businesses, and sell or buy practices with “Win-Win” results. Born in Portland, OR, Fred has relocated to several major cities during his career and has gained intimate knowledge of the business of dentistry in all corners of the U.S. Clients often consider Fred “a friend of the practice” who helps make sense of the complicated world of dental practice management & transitions.

## **Saturday, August 10, 2019**

10:00 a.m. - 11:00 a.m.

Marketing Your Practice: Setting Specialists Apart Online

Laura Nadler, MA

WorkingCat

### **Learning Objectives:**

At the conclusion of this session, attendees should be able to:

- Identify video and blog platforms.
- Describe the value of video and blog in SEO results.
- Utilize video in blog in their marketing strategy.

**Session Descripton:** Specialists need to market on two fronts - to patients and to referring GP's. Laura will show us two of the best ways to be both a voice of authority and education for GP's, and to make sure that patients know they'll be comfortable and welcome in your practice.

**Teaching Method(s):** Didactic presentation with question and answers.

**Speaker Bio:** Laura J Nadler, CEO of WorkingCat has been having a blast in the dental industry since 1993. She consults for individual providers and multinational companies. She has been the head of sales and/or marketing for organizations like Denmat, JPMorganChase and a couple of tech companies. She speaks and trains internationally for companies and organizations in Dental, Ortho and Tech. Laura is a member of the Speaking Consulting Network and ADDOM Speaker Alliance.

## **Saturday, August 10, 2019**

11:00 a.m. – 12:00 p.m.

Human Resources: Avoiding Legal Minefields While Motivating Your Team

Ali Oromchian, JD, LL.M.

Dental and Medical Counsel, P.C.

### **Learning Objectives:**

At the conclusion of this session, attendees should be able to:

- Identify the top ten human resource and legal minefields to avoid.
- Optimize every situation to bring out the best in their employees.
- Create a team atmosphere with motivation and unstoppable persistence.

**Session Descripton:** As a practice owner, creating a plan for strategic business operations is key. This includes everything from employee management to contracts. As for employee management, you will learn how to reach peak performance by employing basic strategies to ensure your employees are motivated and perform at an optimal level while reducing your chance of employment law violations. Therefore, with every business decision made along your path to success, the legal ramifications that could result must be considered.

**Teaching Method(s):** Didactic presentation with question and answers.

**Speaker Bio:** Ali Oromchian, JD, LL.M. is co-founder and Chief Executive Officer of HR for Health, which is a software as a service platform that provides web-based human resources solutions and advice for health care practice owners and managers. Ali is also a founding attorney of the Dental and Medical Counsel, P.C. law firm and one of the nation's leading legal authorities on topics relevant to doctors.

## **Saturday, August 10, 2019**

1:00 p.m. – 2:30 p.m.

The Dentist's Guide to Medical Billing

Christine Taxin

Adjunct Professor, NYU Dental

### **Learning Objectives:**

At the conclusion of this session, attendees should be able to:

- Recall periodontal and dental coding changes.
- Recognize the medical reasons to bill medical.
- Identify the law that allows a dentist to legally bill medical insurance.

**Session Descripton:** Medical billing can hold tremendous potential for the cash ow in your dental practice. Many procedures that fall within a prosthodontist's expertise can be billed medically, with more on the horizon. This session will take you through multiple specific areas of clinical focus and their potential for receiving medical insurance benefits.

**Teaching Method(s):** Didactic presentation with question and answers.

**Speaker Bio:** Prior to starting her own management consulting company, Christine worked for a large New York City hospital as administrator of a critical department, managed an extensive practice, and worked with Coaching Solutions and Dynamic Administrators consulting companies. She has trained in management at LVI. She has been awarded "Leader in Consulting" for the past four years in Dentistry Today. Christine serves as an adjunct professor at the New York University (NYU) Dental School and Resident Programs for New York City Programs. Christine will also begin teaching coding at Harvard Dental School.

## **Saturday, August 10, 2019**

2:30 p.m. – 3:30 p.m.

Social Media to Grow Your Practice

Rita Zamora, BS

Rita Zamora Connections

### **Learning Objectives:**

At the conclusion of this session, attendees should be able to:

- Describe how advertising and internet marketing have changed and what this means for their practice.
- Identify basic social media strategies and tactics.
- Discuss how social media can help enhance and protect their online reputation.

**Session Description:** Over 40% of potential new patients will never consider your practice unless you provide them with ample opportunity to research you online. This goes far beyond having a traditional website. Discover what top practices are doing to grow their practice with social media.

**Teaching Method(s):** Didactic presentation with question and answers.

**Speaker Bio:** Rita Zamora is author of the book, *Get Found, Get Liked, Get Patients - Making the Most of Social Media*, and founder of Rita Zamora Connections, a social media marketing agency. She is known as “Dentistry’s Social Media Expert” and is one of the most highly sought after social media speakers. Her advice on managing your online reputation was published in the American Dental Association’s *Practical Guide to Expert Business Strategies* and she served as a Contributing Faculty Member on the topic of marketing for the 2015 American Dental Association’s Center for Success Certificate Program. Since 2008, she and her team have worked to train or assist dental and healthcare professionals in authentic and valuable online interactions. Rita graduated magna cum laude from the University of Colorado with a bachelor’s degree in business and marketing and has over 20 years of experience working in the business of dentistry.

## **Saturday, August 10, 2019**

4:00 p.m. – 5:00 p.m.

Essential Insurance, Investment, and Planning Strategies for Prosthodontists

Shawn Johnson, ChFC, CLU, CLTC

Treloar & Heisel, Inc.

### **Learning Objectives:**

At the conclusion of this session, attendees should be able to:

- Identify personal and business insurance policies important to risk management protection for today's prosthodontist.
- Discuss investment risk tolerance and its role in portfolio design as well as qualified and non-qualified investment accounts available to create wealth.
- Summarize the importance of setting goals, implementing strategies, and following a well-designed plan to reach financial independence.

**Session Description:** With the ultimate goal of financial independence in mind, attendees will learn key risk management tools important for personal and professional protection. We will also discuss the importance of establishing financial goals, following a formal plan and understanding investor behavior with regards to investment volatility.

**Teaching Method(s):** Didactic presentation with question and answers.

**Speaker Bio:** Shawn Johnson is Vice President of Business Development at Treloar & Heisel, Inc., a financial services provider to dental and medical professionals across the country. He has assisted hundreds of clients from residency to practice and through retirement with a comprehensive suite of financial services, custom-tailored advice, and dedicated client service.



**General Information**  
**Practice Management Course**  
**August 10, 2019**  
 Conrad Hotel Chicago  
 101 East Erie, Chicago, IL 60611

---

**2019 ACP PRACTICE MANAGEMENT COURSE DIRECTLY SPONSORED BY  
 THE AMERICAN COLLEGE OF PROSTHODONTISTS**

**STATEMENT OF NEED**

The American College of Prosthodontists (ACP) is dedicated to stimulating and supporting prosthodontics-related: research, education, clinical practice, patient care, outcomes, restoration of teeth and orofacial structures. *Enhancing quality of care to improve patient outcomes through education in practice management is a strategic priority of the ACP & ACPEF.*

**TARGET AUDIENCE**

The primary target audience of the American College of Prosthodontists’s 2019 Practice Management Course is its members. Secondary audiences include Prosthodontists, residents, dental students, and office staff.

**GLOBAL LEARNING OBJECTIVES**

This comprehensive meeting provides learners with opportunities to:

- Examine a prosthodontic practice in terms of factors that influence value and drive revenue.
- Assess the value and impact of marketing and outreach strategies.
- Navigate risks and follow best practices for sound business operations.

**DESCRIPTION OF COURSE CONTENT**

This course is designed for experienced practitioners, prosthodontists considering a career in practice, and office staff members who are interested in state-of-the-art strategies for reaching patients, increasing revenue, and building a cohesive, high-performing team. From investment strategies to employee relations and patient satisfaction, every practitioner faces important questions on a daily basis.

**NOTE:**

Each presentation has its own specific learning objectives and session description which are included within the handout.

**REGISTRATION CATEGORY**

Registration Category	Standard Registration Rates
Physician Members	\$95
Office Staff	\$125

**General Information**  
**Practice Management Course**  
**August 10, 2019**  
Conrad Hotel Chicago  
101 East Erie, Chicago, IL 60611

---

**SAFETY AND SECURITY**

It is recommended that all attendees review the safety information supplied by the hotel. As with all cities, it is recommended that you be alert and stay aware of your surroundings. The ACP is unable to hold attendees' bags, packages, briefcases, coats, laptops, and other personal items in the meeting registration area.

**ATTIRE**

Business casual (tie optional) is the recommended attire for educational sessions.

**ALCOHOL/SMOKING**

The ACP expects all attendees to act responsibly when consuming alcoholic beverages. Consumption of alcohol by minors is prohibited. The ACP maintains a non-smoking policy in all meeting rooms, the Exhibit Hall, and the registration area.

**CHILDREN**

Children under the age of 18 must be accompanied by an adult at all times. Children are not allowed in the Exhibit Hall or education sessions.

**CONTINUING EDUCATION CREDIT**

The American College of Prosthodontists designates this activity for 7 continuing education credits. This includes the education sessions and the Corporate-Sponsored sessions.

**ADA C·E·R·P®** | Continuing Education  
Recognition Program

The American College of Prosthodontists is an ADA CERP Recognized Provider. ADA CERP is a service of the American Dental Association to assist dental professionals in identifying quality providers of continuing dental education. ADA CERP does not approve or endorse individual courses or instructors, nor does it imply acceptance of credit hours by board of dentistry.



The American College of Prosthodontists is designated as an Approved PACE Program Provider by the Academy of General Dentistry. The formal continuing dental education

**General Information**  
**Practice Management Course**  
**August 10, 2019**  
Conrad Hotel Chicago  
101 East Erie, Chicago, IL 60611

---

programs of this program provider are accepted by AGD for Fellowship/ Mastership and membership maintenance credit. Approval does not imply acceptance by a state or provincial board of dentistry or AGD endorsement. The current term of approval extends from 10/31/2018 to 10/31/2021. Provider ID#: 214690.

To be eligible for credits, participants must:

1. Attend the entire session
2. Evaluate the session and the speaker(s)

Concerns or complaints about a CE provider may be directed to the provider or to ADA CERP at [www.ada.org/cerp](http://www.ada.org/cerp).

### **EVALUATIONS**

Participants can evaluate online on after the conference.

- Practice Management Evaluation: <https://www.surveymonkey.com/r/WT7NRZT>

### **CODE OF CONDUCT**

The ACP is dedicated to providing a safe, harassment-free, and inclusive meeting experience for all participants. Participants in ACP meetings include members, registrants, guests, staff, speakers, sponsors, exhibitors, and Board members. The ACP does not tolerate harassment of meeting participants in any form. Any violations will be taken seriously.

Harassment includes offensive comments or gestures related to gender, gender identity, age, sexual orientation, disability, physical appearance, body size, race, ethnicity, religion, technology choices, sexual images in public spaces, intimidation, stalking, following, harassing photography or recording, sustained disruption of presentation, or other events, inappropriate physical contact, and unwelcome sexual attention. Harassment can occur in real or virtual space, including social media related to the meeting.

The ACP reserves the right to determine, at its sole discretion, whether any behavior at any meeting is unacceptable and in violation of this Code of Conduct. In the event that it is determined that an individual has violated this Code of Conduct or has otherwise engaged in conduct that is deemed to be improper, prejudicial, or detrimental, the ACP reserves the right to (1) remove any such individual from an event or meeting, (2) bar any individual from attending future ACP meetings, and/or (3) suspend any such individual's membership or expel such individual from the ACP.

## **General Information**

### **Practice Management Course**

**August 10, 2019**  
Conrad Hotel Chicago  
101 East Erie, Chicago, IL 60611

---

#### **CANCELLATION POLICY, PROGRAM DISCLAIMER & CODE OF CONDUCT**

All cancellations are subject to a \$50 processing fee. Full refunds for registration minus the \$50 processing fee will be given only if written notice of cancellation is received 30 days prior to the course. A 50% refund will be given if written notice is after 30 days, up until one week prior to the course. No refunds will be given within one week prior to a course; therefore “no shows” will not be eligible for a refund. Notice of cancellation should be made in writing and sent to the ACP by email to [education@prosthodontics.org](mailto:education@prosthodontics.org) or fax to (312) 573-1257.

All programs and events are subject to change and/or cancellation because of scheduling conflicts, low registration, and/or circumstances beyond the control of the ACP. The ACP is not responsible for travel expenses or penalties under any circumstances. In the event of a cancellation by the ACP, all registrants will receive a full refund of any registration fees paid. By attending the course, attendees agree to allow photographing, videotaping, audiotaping, or webcasting and for their image to be used by the ACP in association publications, on the ACP’s website, and in marketing and promotional materials.

The ACP is dedicated to providing a safe, harassment-free, and inclusive meeting experience for all participants. Participants in ACP meetings include members, registrants, guests, staff, speakers, sponsors, exhibitors, and Board members. The ACP does not tolerate harassment of meeting participants in any form. Any violations will be taken seriously and handled in accordance with the ACP’s code of conduct policy, which is posted at [Prosthodontics.org](http://Prosthodontics.org).

#### **PROGRAM DISCLAIMER**

The ACP Annual Session is an open forum for sharing information related to the field of prosthodontics. Presentation content is that of the individual speaker or group. The ACP does not recommend or endorse a specific test, product course of treatment, procedure, opinion, or other information mentioned during the ACP Annual Session.

All programs and events are subject to change and/ or cancellation because of scheduling conflicts, low registration, and/or circumstances beyond the control of the ACP.

The ACP, its contractors, and attending news media may be photographing, videotaping, audiotaping, or webcasting scientific sessions and events at the Annual Session. By attending the ACP Annual Session, attendees acknowledge these activities and agree to allow their image to be used by the ACP in association publications, on the ACP’s website, and in marketing and promotional materials. Photo images are made available to Annual Session attendees and may also be shared with the media. Attendees at the Annual Session waive all claims against the ACP for any liability resulting from these uses.

## **General Information**

### **Practice Management Course**

**August 10, 2019**

Conrad Hotel Chicago

101 East Erie, Chicago, IL 60611

---

Only official contracted ACP vendors and working journalists with ACP approved press credentials will be permitted to photograph, video, and/or audio tape all Annual Session activities. Individuals recording with personal video/audio equipment or other recording devices (i.e. cell phones, digital or film cameras, or tape recorders) without prior permission from the ACP or without proper credentials will be asked to cease recording or using these devices immediately.

### **COMMERCIAL SUPPORTERS**

The American College of Prosthodontists gratefully acknowledges the following Corporate Partners for providing support of the ACP's 2019 Practice Management Course.



AMERICAN COLLEGE OF PROSTHODONTISTS

**Education Foundation**

*Advancing prosthodontics through education and research*





AMERICAN COLLEGE OF  
**PROSTHODONTISTS**  
Your smile. Our specialty.®

## **General Information**

**Practice Management Course**

**August 10, 2019**

Conrad Hotel Chicago

101 East Erie, Chicago, IL 60611

---

### **ACP CENTRAL OFFICE**

211 E. Chicago Ave.,  
Suite 1000 Chicago, IL 60611

Phone: (312) 573-1260

Fax: (312) 573-1257

**Email:** [acp@prosthodontics.org](mailto:acp@prosthodontics.org)

**Website:** <https://www.prosthodontics.org/>

### **ACP STAFF**

Linda Caradine-Poinsett, MBA, MJ, PhD, Executive Director

Mark Heiden, MS, Associate Executive Director, Communications & Marketing

Cheri Chavez, Executive Assistant

Evan Summers, Communications & Public Relations Manager

Carrie Villa, MM, Director, Finance & Administration

Nathalie Williams, Director, Sections & Governance

Adam Reshan, Director, Membership Services & Academic Relations

Justinn McDaniel, Membership Services Manager

Ellyn Shapiro, ACPEF Professional Affairs Manager

Jennifer Wahl, Director, Education & Meetings

Katie Koszyk, CMP, Manager, Education & Meetings

**DISCLOSURES**  
**Practice Management Course**  
**August 10, 2019**  
 Conrad Chicago Hotel  
 101 East Erie, Chicago, IL 60611

---

Disclosures of Significant Relationships with Relevant Commercial Companies/Organizations. As required by the Continuing Education Recognition Program (CERP) under the auspices of the American Dental Association and in accordance with the American College of Prosthodontists policy, every effort has been made to encourage speakers to disclose any commercial relationships or personal benefit, which may be associated with their presentations. This disclosure in no way implies that the information presented is biased or of lesser quality. Attendees of this meeting should be aware of these factors in interpreting the program contents and evaluating recommendations. Moreover, views of faculty do not necessarily reflect the opinions of the American College of Prosthodontists.

**The following speakers reported they have no relationship(s) with commercial interest(s) to disclose relevant to the content of this CERP activity:**

- Fred Heppner
  - Laura Nadler, MA
- 

**The following speaker(s) reported they do have relationships with Commercial Interest(s) to be disclosed to learners:**

SPEAKER	COMMERCIAL INTEREST	ROLE
Lars Bouma, DDS, MS, FACP	Dentsply Sirona, Avadent, Ivoclar Vivodent, McGarry Implant Institute	Consultant / Honorarium/Employee
Shawn Johnson	Treloar & Heisel	Employee
Ali Oromchian, JD, LLM	Dental & Medical Counsel, PC	Stock Shareholder
Christine Taxin	Care Credit	Honorarium
Rita Zamora	Rita Zamora Connections	Consultant