



Integration Playbook

**FOR PRACTICE MANAGERS AND
PRACTICE STAFF**

Month/Year

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Corrine Maddoux, corrinemaddoux.com

Table of Contents

Leadership & Key Contacts.....	3
A Note From Our Founders.....	4
Section 1: Welcome.....	5
Section 2: Human Resources, Recruiting & Payroll.....	9
Section 3: Finance & Accounting.....	11
Section 4: Information Technology.....	13
Section 5: Revenue Cycle Management.....	15
Section 6: Operations.....	17
Section 7: Marketing.....	19
Questions?.....	21

Click on each title to be directed to that page.

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Leadership & Key Contacts



Dr. Placeholder
Founder & CEO

Email: [to be added]
Phone: [to be added]



Dr. Placeholder
Founder

Email: [to be added]
Phone: [to be added]



Dr. Placeholder
Position

Email: [to be added]
Phone: [to be added]



Dr. Placeholder
Position

Email: [to be added]
Phone: [to be added]



Dr. Placeholder
Position

Email: [to be added]
Phone: [to be added]



Dr. Placeholder
Position

Email: [to be added]
Phone: [to be added]

A Note From Our Founders

Dearest [Practice Owner Name],

It is with genuine excitement and gratitude that we welcome you to the Brite Dental Partners family. Over the past several months, getting to know you and your team has been a true pleasure, and we are deeply grateful for the trust you have placed in us by entering this partnership.

At Brite, we are on a mission to bring a different kind of partnership to dentistry and orthodontics—one built around doctors helping doctors. Our model was founded by practicing clinicians who understand what it means to stand in an operatory every day. We believe that when practices are freed from administrative burden, they can focus on what they do best: delivering exceptional patient care.

This Integration Playbook is your resource for navigating the integration process. Over the next 120 days, you will meet leaders from our functional areas who will work alongside you and your team to bring your practice onto the Brite platform.

Every practice is unique. We do not take a one-size-fits-all approach. Our commitment is to learn from what you do well, share what we have built, and together build something even stronger.

Thank you for being here. We look forward to what we will build together.

Sincerely,

Dr. Satish Pai & Dr. Nimesh Patel



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Section 1: Welcome



A Bit of Brite History



Brite Dental Partners was founded by Dr. Satish Pai and Dr. Nimesh Patel, both practicing orthodontists who built Brite around their own experience growing and operating clinical practices. The people running Brite have stood in the same operatories you stand in every day.

Brite operates as a Dental Partnership Organization (DPO), not a traditional Dental Service Organization (DSO). The distinction matters. A typical DSO model centralizes control and standardizes clinical decisions from the top down. Our model is built around preserving clinical autonomy for partner doctors while providing the business infrastructure (finance, HR, marketing, revenue cycle, compliance) that lets practices run better without a corporate parent dictating how care is delivered.

Our mission is simple: to support our partner doctors' visions. We leverage deep orthodontic and business acumen to empower independent practices who are ready to strengthen their operations, retain their clinical identity, and grow on their own terms. At Brite, we are stronger together.



A Partnership Built Around Your Practice



Congratulations on reaching this next step in your journey with Brite Dental Partners. You might have questions about what comes next and what changes are ahead. This Integration Playbook is your resource for a seamless integration into each of our key functional areas.

Our goal is to alleviate challenges, not create them. Your collaboration is essential, and we are here every step of the way. Over the next 120 days, our team will assess your practice alongside you, incorporating the areas where Brite can add the most value while protecting what makes your practice exceptional.

Certain functions begin shortly after the deal closes. A detailed timeline for each area can be found throughout this document. We tailor the transition process to the unique needs of each practice—there is no single template, because no two practices are the same.



What to Expect



The first few months after closing will be active. Each department has dedicated leaders who will work to transition functional areas onto the Brite platform. The sections that follow outline what you can expect in each functional area during the transition period.



Functional Areas & Key Responsibilities



Human Resources & Payroll: Our team ensures your staff have the resources and support they need to grow and develop. We offer robust hiring, onboarding, and continued education opportunities. Our payroll department is part of HR and provides management and oversight of all payroll activities.

Recruiting: People are the cornerstone of everything we do. We are nothing without our teams, and our teams must feel the value we place upon them. We work to create and cultivate a high-performance culture.

Finance & Accounting: We coordinate with your office management team to manage financial-related administrative tasks, including accounts payable, corporate credit cards, cash management, and financial reporting.

Information Technology: Our IT team works with your practice to improve data management, system and network monitoring, IT security, HIPAA compliance, software implementation, service desk support, and cloud network solutions.

Revenue Cycle Management: We manage and optimize the revenue cycle from the moment a patient schedules to final collection, improving staff performance, patient experience, and revenue integrity.

Operations: Our team provides analysis, tracking, and consulting on key performance indicators to support informed business decisions. Operations offers support through coaching, goal setting, and vendor management.

Marketing: Our team allows you to focus on treating your patients while we strategically promote your services, build brand awareness, and engage with your target audience to foster lasting relationships and drive growth.



Timelines & Schedules — An Overview



Each functional area has its own timeline for transitioning services. The detailed schedules for each area follow in the sections below. Here is a high-level overview of what happens across key areas:

Human Resources & Payroll: Aligns benefits and recruitment needs, conducts on-site employee orientation, and completes transition to the corporate payroll platform and retirement plan.

Finance & Accounting: Completes pre-close financial actions, transfers accounts payable and corporate banking, and establishes routine financial reporting workflows.

Information Technology: Performs initial infrastructure discoveries, completes on-site network and hardware upgrades, and transitions systems to ongoing service desk support.

Revenue Cycle Management: Conducts initial financial introductions, completes fee schedule and software reviews, and institutes recurring revenue audits and collections monitoring.

Operations: Conducts practice workflow assessments, implements performance tracking and schedule optimization, and drives long-term operational growth.

Marketing: Performs brand discovery and digital asset reviews, executes promotional strategies, and manages ongoing patient acquisition campaigns.

A Note on Timing

Some operational details and specific timelines are updated continuously throughout due diligence. In these instances, we will provide updates as they pertain to your specific deal and as plans are finalized.

Section 2:

Human Resources, Recruiting & Payroll



What to Expect



Our HR team ensures your staff has the resources and support they need. We offer robust hiring, onboarding, payroll management, and continued education opportunities. People are the cornerstone of everything we do, and we want every member of your team to feel that value from day one.

After closing, our HR team will complete on-site training and enrollment meetings with your staff. They cover all things related to HR, help staff navigate new systems, and answer questions directly. Key areas of support include:

- Benefits enrollment and administration
- Retirement plan transition
- Payroll processing and management
- Employee relations and offboarding support
- Workers' compensation and business insurance review
- State and federal reporting support
- Staff and associate orthodontist recruiting



Timeline



First 30 Days	• Introductory call with the HR team and Practice Manager to discuss benefits (including retirement plans), staffing and recruitment needs, workweek, payroll cycles, bonus plans, and employee-related concerns. • If retirement plan(s) are still in effect, HR will work with your plan administrator through the transition. • Support employee relations needs and offboarding conversations. • Review and assist in canceling any redundant business insurances (workers' compensation, P&C, malpractice, etc.). • Support with required state or federal reporting and unemployment claims. • Begin recruiting outreach for any open positions, including office culture overview, current and future hiring needs, and pathway to acquisition for any associate orthodontists.
First 60 Days	• Conduct on-site employee meetings to discuss benefits, time-off programs, policies, and pay practices. • During the on-site meeting, HR will help employees download the UKG app and complete employee setup for direct deposit, taxes, and benefit enrollment. • Scan employee documents to create digital HR files. • An FAQ guide is provided following the on-site visit to outline impending changes and policy differences. • HR and Payroll schedule a training call to review UKG Time and Attendance, approval of time and time-off requests, payroll timelines, and employee change submissions. • Payroll schedules a first payroll meeting for review and approval of the payroll journal.
First 90 Days	• Provide HR/Payroll support as employees receive first Brite paycheck. • Payroll assists in termination of legacy payroll system and current-year W-2 processing. • Complete document execution for doctor adoption of the Brite retirement plan.
First 120 Days	N/A

Section 3: Finance & Accounting

What to Expect



Our Finance team will begin interacting with your practice immediately after closing. We coordinate with your office management to handle all financial-related administrative tasks, including banking, corporate credit cards, centralized accounts payable, centralized purchasing, and financial reporting.

Key areas where our Finance team supports practices include:

- Accounts payable and credit cards
- Banking setup and transition
- Centralized purchasing
- Financial statement preparation and reporting



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Timeline



5 Days Prior to Close	• Pay off existing corporate credit cards 48 business hours prior to closing (Doctor responsibility). • Disable all automatic payments in existing bank accounts. • Settle large vendor balances (Align, Ormco, 3M, etc.). • Confirm receipt of Brite corporate credit card (Divvy). • Establish legacy bank access for Finance team if accounts are co-mingled.
First 30 Days	• Provide online bank access for legacy accounts to Finance team immediately upon partnering. • Add Brite as an authorized signer on existing bank accounts. • Establish new bank account under Brite umbrella to support future deposits and PMS conversion (legacy accounts remain open up to 60 days if government funding applies). • Distribute corporate Visa cards (Divvy) and discontinue legacy credit card usage for practice expenses. • Verify all automatic payments from legacy bank accounts are disabled at closing. • Transition to centralized accounts payable via Sage Intacct (vendors paid weekly on Thursdays; checks mailed Fridays; reports delivered following Mondays). • Connect centralized purchasing with practice vendors to implement Brite preferred pricing. • Complete fixed asset inventory identifying descriptions, ages, costs, serial numbers, and replacement timelines • Collect prior months' financial statements, balance sheets, AR aging reports, bank statements, and reconciliations.
First 60 Days	• Transition merchant deposits to newly established Brite account. • Begin GAAP financial statement preparation on the first day of the month following acquisition. • Conduct final audit of legacy bank accounts to verify all automatic payments are discontinued.
First 90 Days	N/A
First 120 Days	N/A

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Section 4: Information Technology



What to Expect



Our IT team will begin working with your practice shortly after closing. They will assess your current IT environment and develop a plan to transition your practice onto our secure, integrated IT platform. Our goal is continuity of care with enhanced security and connectivity.

Key areas where our IT team supports practices include:

- Data management
- System and network monitoring
- IT security and HIPAA compliance management
- Software implementation
- Service desk support
- Telecom data services
- Cloud network solutions



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Timeline



First 30 Days	• Conduct introductory call with Practice Manager to review IT onboarding process and gather site information. • Introduce Brite Helpdesk Process and Support Center for technical support and equipment requests. • Execute on-site tech upgrades: plan internet circuit upgrades, install SD-WAN equipment, deploy Brite Firewalls, and replace aging hardware identified during due diligence.
First 60 Days	• Remediate cabling and wireless access points. • Install Brite Tech Stack: migrate practice email, assign staff email addresses, and deploy email security tools. • Migrate website domain. • Migrate computers to Brite Tech Stack. • Migrate non-PMS practice data to Brite network.
First 90 Days	• Implement HIPAA safeguards: enforce Multi-Factor Authentication (MFA) and two-step verification for remote access. • Migrate phone systems to Brite VoIP network.
First 120 Days	• Provide practice access to Brite Intelligence platform for real-time analytics. • Execute Practice Management System (PMS) migration and share detailed timeline of critical dates with Practice Manager.

Section 5: Revenue Cycle Management



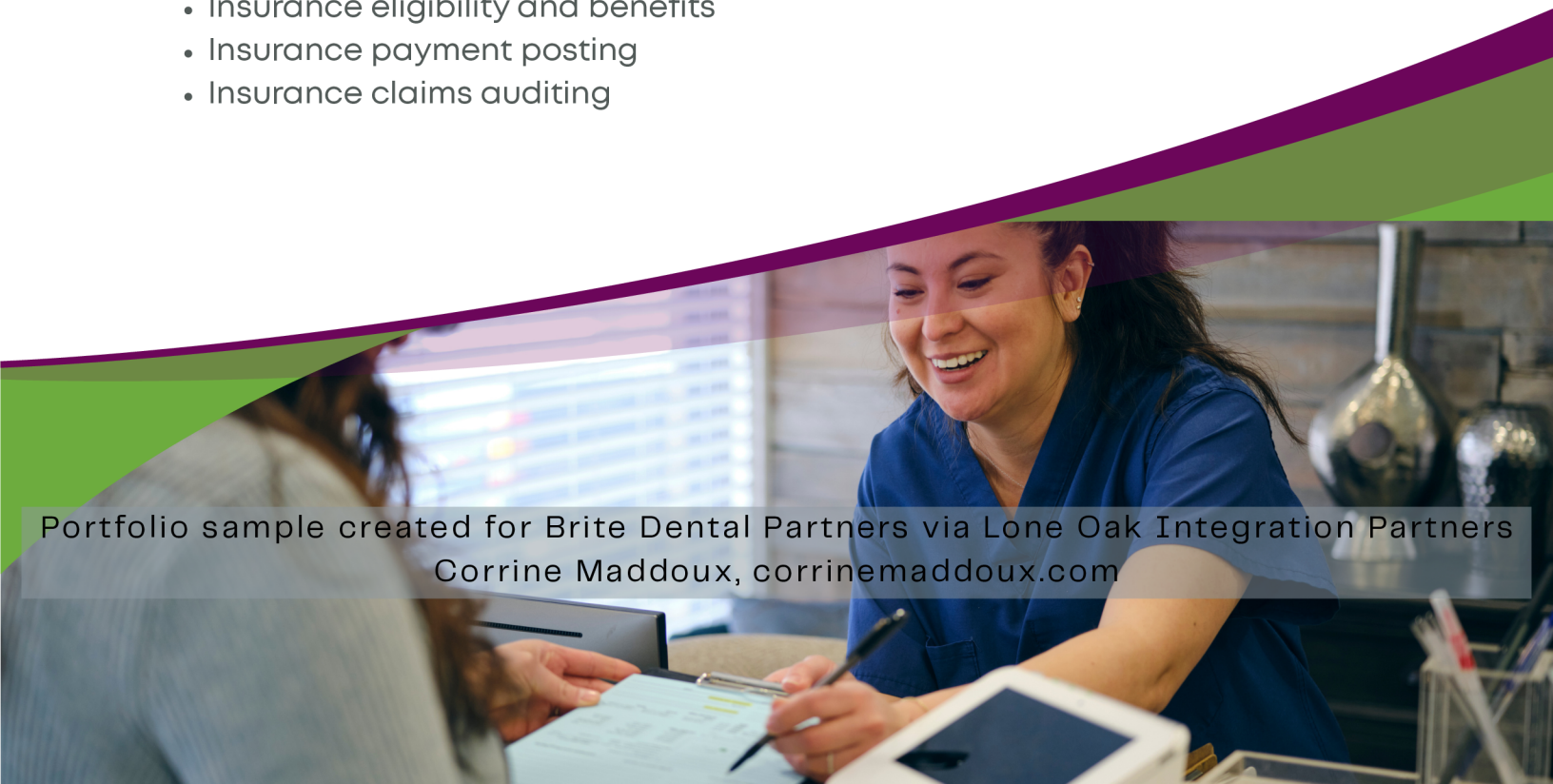
What to Expect



Revenue Cycle Management (RCM) is the financial process used to manage and optimize the revenue cycle, from the moment a patient schedules an appointment to the final collection of service revenue. Our centralized RCM team improves staff performance and patient experience, optimizes revenue, and prevents revenue leakage.

Key areas where our RCM team supports practices include centralizing the following key processes:

- Insurance A/R implementation
- Patient A/R implementation
- Credentialing
- Insurance eligibility and benefits
- Insurance payment posting
- Insurance claims auditing



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Timeline



First 30 Days	N/A
First 60 Days	• Conduct introductory call with Practice Manager and Financial Coordinator to review monthly reporting needs. • Implement centralized insurance A/R management: perform full audit of outstanding claims to evaluate denials, missing information, and unsubmitted service claims. • Implement centralized patient A/R management: transition accounts past 30 days to RCM team to issue automated texts, emails, and demand letters. • Execute centralized credentialing: transfer EFT payments to new Brite bank account (excluding Medicaid) and submit ERA delivery applications to clearinghouse.
First 90 Days	• Implement centralized insurance eligibility and benefits verification: complete checks for New Patient and Observation Exams at least three days prior, and same-day/next-day appointments at least two hours prior.
First 120 Days	• Execute routine centralized claims submission for initial, continuation, and work-in-progress claims. • Centralize insurance payment posting: post electronic and mailed payments upon ERA setup completion. • Initiate centralized insurance claims auditing: review historical claims submissions for billing and coding accuracy.

Section 6: Operations

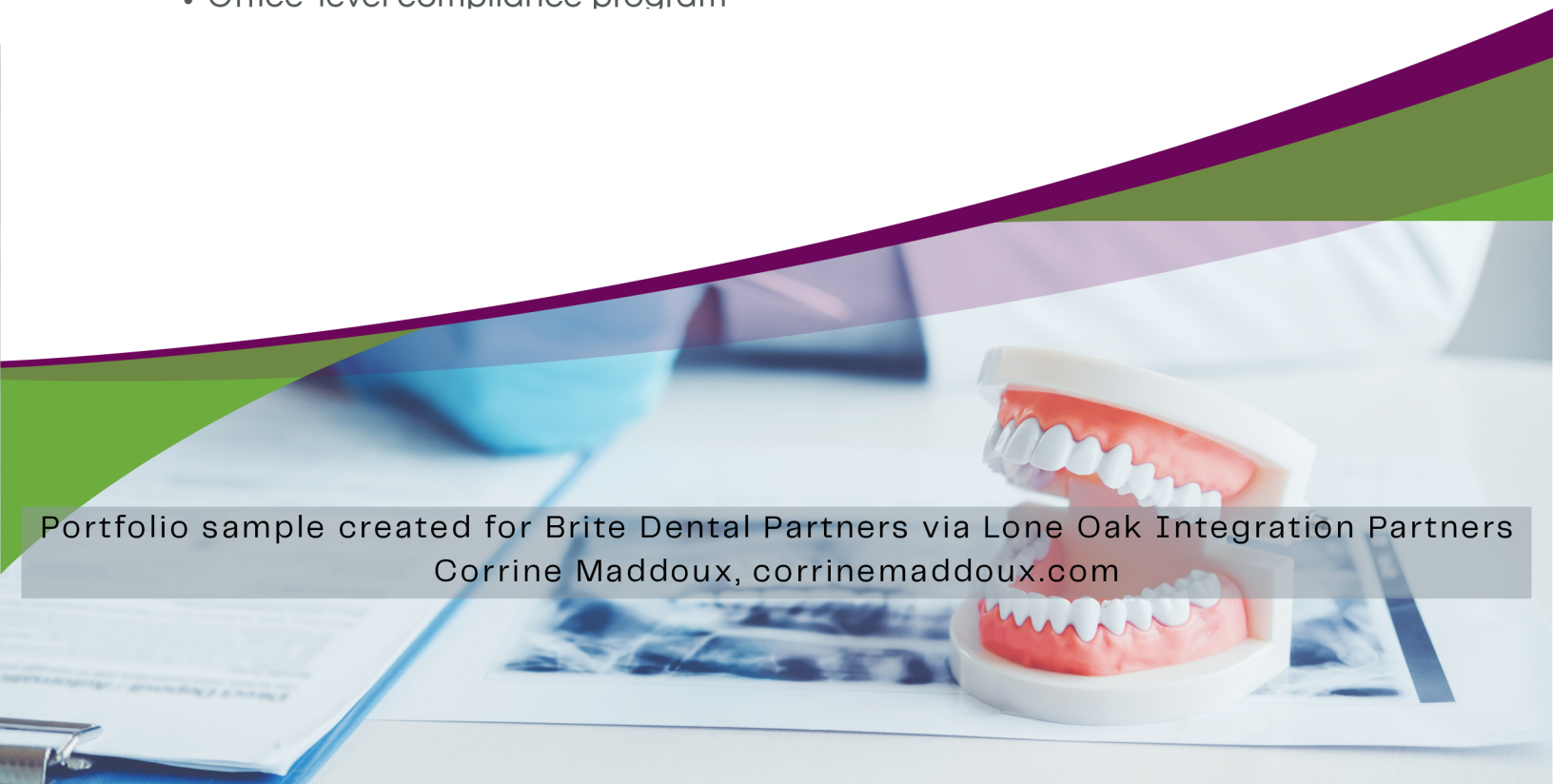
What to Expect



Our Operations team provides reporting, analysis, tracking, and consulting on key performance indicators to support informed business decisions. They offer practice-level support through vendor and lease management, coaching, and goal setting.

The Operations team works closely with other departments and your Practice Manager to support new initiatives, align on definitions, and help you achieve your individual practice goals. Key areas of Operations support include:

- Shoulder-to-shoulder regional manager support
- Coaching on best practices
- KPI reporting and analysis
- Vendor management with competitive pricing
- Office-level compliance program



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Timeline



First 30 Days	• Operations leadership conducts initial on-site visit to meet with the Partner Doctor and Practice Manager. • Assess current staff roles and alignment on job functions for key positions. • Conduct capacity assessment comparing dental assistant staffing, available chairs, and monthly doctor schedule days. • Operations collaborates across departments (Recruiting, HR, Marketing, Finance, RCM) to deliver in-person support at a regional level. • Evaluate existing vendors, establish vendor management plan, and deploy strategic suppliers to reduce expenses. • Conduct training with Finance, RCM, Partner Doctor, and Practice Manager on GAAP revenue recognition categories. • Review PMS implementation timeline and standardize processes impacting GAAP revenue recognition.
First 60 Days	• Review key performance indicators (KPIs) with Partner Doctor and Practice Manager to establish practice imperatives. • Evaluate Practice Manager bonus structures. • Collaborate with Practice Manager to construct practice Revenue Growth Plan.
First 90 Days	• Initiate monthly financial reviews with Partner Doctor and Practice Manager. • Identify EBITDA priorities to increase profitability. • Implement operational best practices: optimize Observation Program, improve lead capture, and align with RCM to increase collections.
First 120 Days	• Provide ongoing shoulder-to-shoulder Regional Manager coaching for Practice Manager and clinic team.

Section 7: Marketing



What to Expect



Our Marketing team is delighted to welcome you and your team. We are dedicated to fostering the continued growth of your practice while preserving the brand identity and community presence you have built. The official kickoff meeting marks the start of our collaborative work toward your practice's growth objectives.

Key areas where our Marketing team supports practices include:

- New patient acquisition
- Digital growth strategy
- Listing management and optimization
- Lead tracking and email/SMS campaigns
- Digital advertising
- Reputation management



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Timeline



First 30 Days	• Conduct 60-minute Discovery Call with Doctor, Practice Manager, and marketing leads to establish brand history, market position, and growth objectives. • Provide contact details for legacy marketing agency to initiate transition and coordinate handoff. • Collect practice brand assets, including vector logo files, brand guidelines, and photography of the doctor, team, and facility. • Onboard practice to Brite digital marketing program.
First 60 Days	• Deploy updated practice website on Brite digital platform and initiate SEO and listing optimization. • Distribute reputation management toolkit, including custom Google review QR codes and team implementation guide. • Launch search engine advertising aligned with local patient search intent. • Establish centralized local listing management, including Google Business Profile optimization.
First 90 Days	• Deliver performance dashboard, marketing budget, and strategic growth plan for the remainder of the calendar year.
First 120 Days	N/A



Questions?

Reach out anytime to your Lone Oak integration lead. We are your day-to-day point of contact throughout this process. If something comes up (big or small), let us know, and questions will be routed to the right person on the Brite side as needed.

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Lone Oak Integration Partners
POST-LOI EXECUTION & INTEGRATION

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