

Getting Back to Dental Practice in a Post-COVID-19 World

Dermot Joyce, CEO ukdentech
Dr Julian Perry, Group Clinical Director {My} Dentist



Introduction

- Our Aim
- COVID-19 Lockdown Outlook in the UK
- Official Guidance for Dentists
- Our Research
- 'Back to Dental Practice' Checklist



GETTING BACK TO DENTAL PRACTICE IN A POST-COVID-19 WORLD

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Abstract

"The following paper is designed to act as a checklist to enable dental practice owners to create an action plan so that they can go 'Back to Practice' swiftly and safely."



‘Back to Dental Practice’ Checklist

- Patient communication inside the clinic
- Remote diagnostics and pre-visit triage measures and protocols
- Practice and practice schedule management: ‘diary management’
- Other Considerations
- The Waiting Room / Teledental
- The Clinical Room
- Laboratory Partner Requirements
- Defcon
- What could the new ‘Normal’ be?



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Abstract

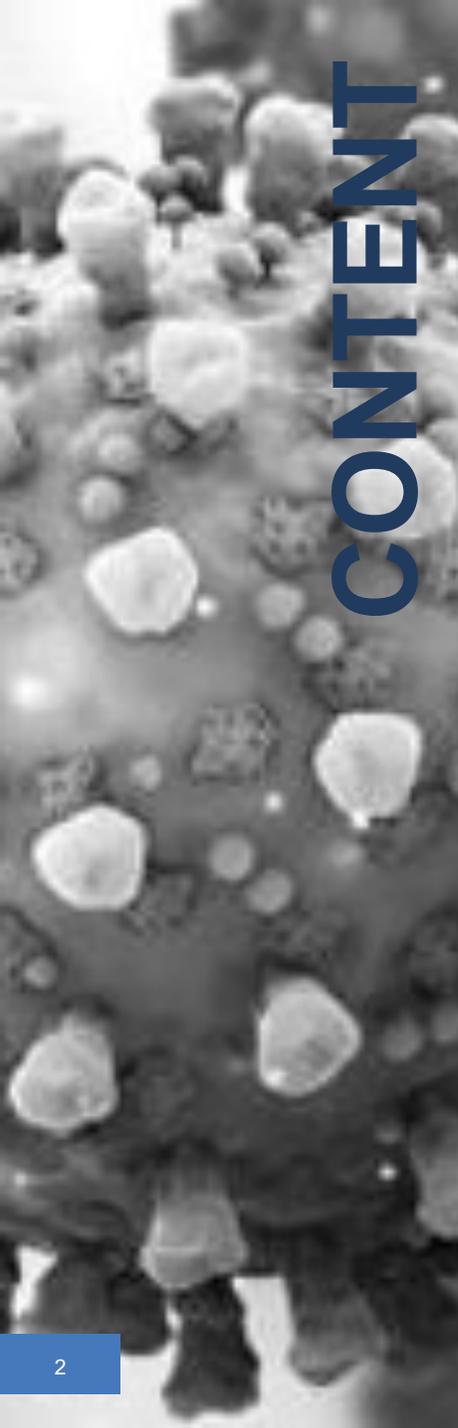
"The following paper is designed to act as a checklist to enable dental practice owners to create an action plan so that they can go 'Back to Practice' swiftly and safely."





Bounce-back Success - The path to the 'new normal': Learnings from China

Vs7 April 16, 2020



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COVID-19

This is a disruption...

- The pandemic has metastasized into an **economic crisis** leaving uncertainty about its size, duration, and shape
- Disruptions usually **fast-track key emerging trends** & put a brake on others
- A “**new normal**” will be forming as certain **changing behaviors will be irreversible**
- Two trends are already clear. The first is a **massive shift towards digital platforms** and online channels
- The second is the enormous **challenge to build “Trust”** and remove the high level of anxiety in entering clinics even after distancing measures are lifted
- The **need to adapt to the new situation** and redefine key strategic initiatives in the new context will be key



The new Normal after 9/11

Checked Baggage Screening

Before 9/11

5%

After 9/11

100%

Federal Flight Deck Officers

2001

0%

2011

9000+

Threat images Screened

2001

200

2011

2'400

Key Questions

Key Questions
in every DSO
leader's mind
right now

1

WHEN will things return to “normal”?

- When will dental practices be allowed to open again with the full treatment portfolio?
- When will patients feel comfortable coming back?
- What will be the impact on key elective procedures (short/mid-term)?

2

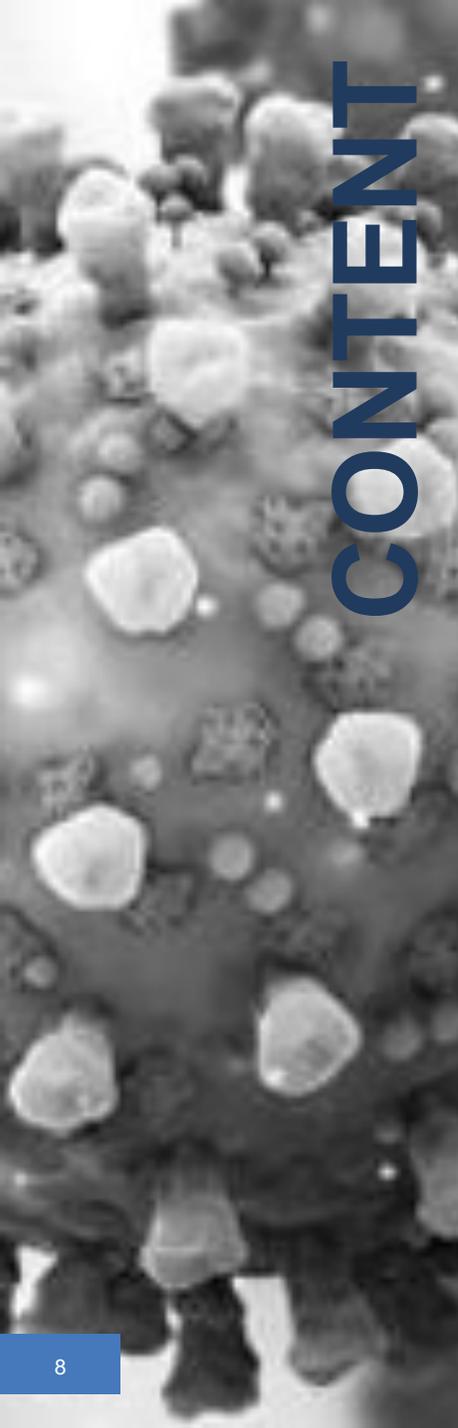
WHAT will the “new normal” look like?

- What will the dental provider landscape look like in the future? Will there be structural changes?
- What will be COVID-specific short-term changes in operating models and what will be more permanent shifts?
- What will likely be the long-term impacts on patient behaviour?
- What trends will accelerate? What new ones will appear?

3

HOW should I prepare to respond?

- How will I know when the crisis is over and the recovery is beginning?
- How do I best prepare for the re-opening?
- What CAPEX is strategic and what can be postponed? What are no-regret moves?



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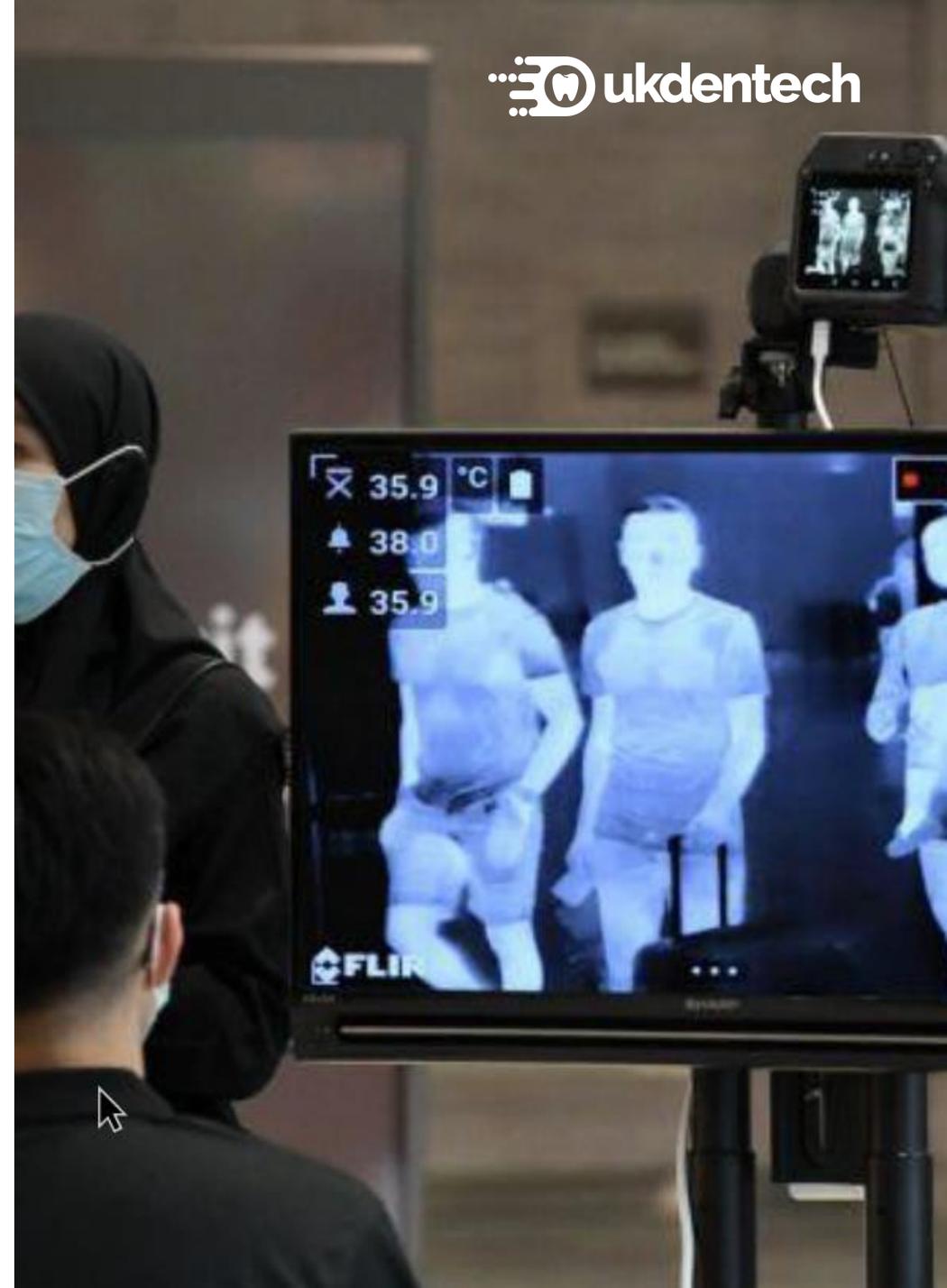
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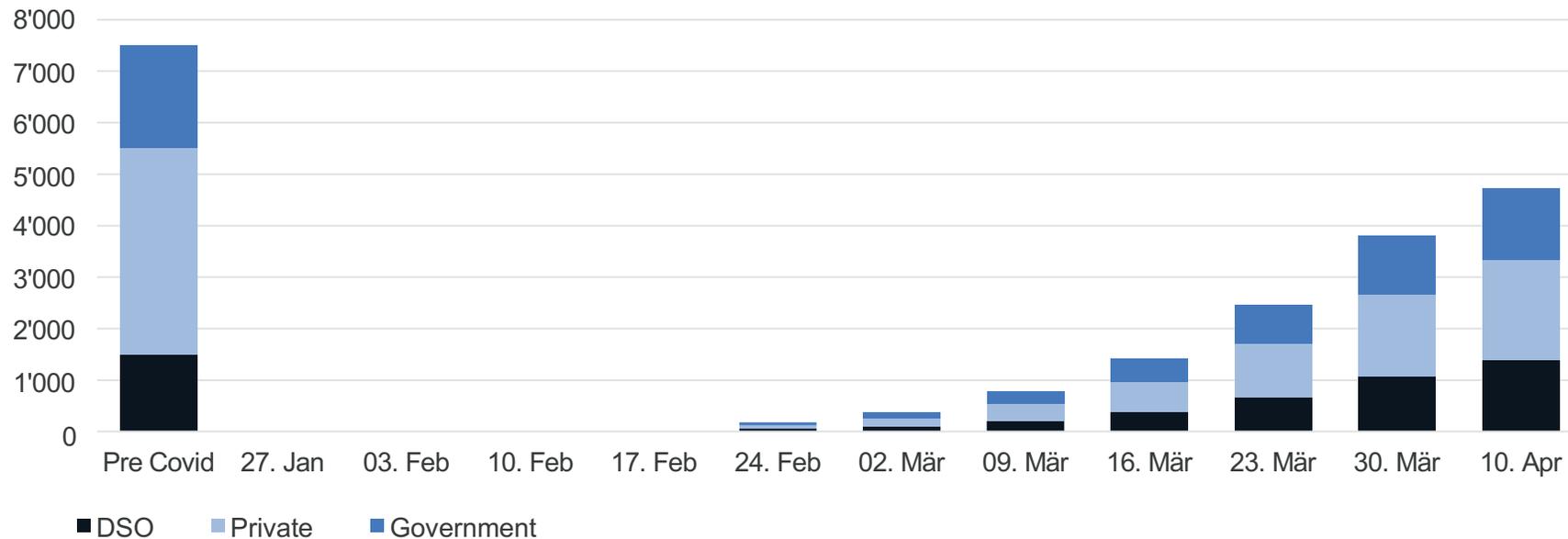
Preface

- China has seen a relatively fast return of dental practice operations post-lock-down
- First results indicate that DSOs have been faster in reopening and in attracting patients than private clinics
- Some DSOs have been able to not only recoup existing patients, but increase their patient base post-lock-down
- The following document is based on interview with CEOs of leading Chinese DSOs to identify best practices and support the bounce-back of DSOs around the world



DSO were fastest in opening as compared to private and even government clinics

China: Number of clinics starting to work by category (total and % of total)
N= 7'500



		Openings in %						
		Feb 24	March 2	March 9	March 16	March 23	March 30	April 10
Government	100%	3%	6%	12%	22%	38%	57%	69%
Private	100%	2%	4%	8%	15%	26%	40%	49%
DSO	100%	4%	7%	14%	25%	44%	72%	92%

- DSOs were more ready to start and more prepared
- Resulting in the ability of DSOs to win new patients and markets share in the first weeks
- 37% of DSOs are engaged in implants already in week 3 of being allowed to do so (versus 17% of private practices and 23% of government clinics)
- DSOs also leading in # of implant treatments – however, reported productivity is down 30% for some clinics because of increased infection control and resulting lower patient consults

COVID-19 Learnings from China – Patient Engagement

72% of respondents stated that early patient engagement was most important for a successful bounce-back

- We have organized a series of on-line events to restore patient confidence. These events together with our call centre engagements played a major role in the bounce-back impact
- The first visit of the patient is still in fear and the barrier cannot be underestimated
- The appropriate communication with the patient enhances mutual trust
- The clinic opened at the beginning of March and traffic has already now returned to 50-60% and implants are at 40 percent to pre-COVID
- We have significantly increased our promotional activity and are holding large scale campaigns



72%

COVID-19 accelerates digital

The crisis has led to a surge in on-line patient campaigns and DSO led digital patient platforms

- The outbreak has made us pay more attention to on-line interactions with patients and we will build our own on-line platform
- We did not try on-line marketing activities before the crisis, but we have and further will significantly increase our investments in this area
- Our success has made us significantly strengthening our on-line operations team after the crisis
- We are significantly increasing the frequency of our promotional activities and are expanding the on-line channel
- We will strengthen our digital patient platform to efficiently interact with patients, and enhance patient loyalty
- We want to obtain first mover advantage on the new on-line patient campaigning battlefield
- We are increasing the intensity of promotional activities and hold large-scale on-line marketing activities.



DSOs Digital Campaigns in China

Wechat Interaction

第一届线上种植牙交流答谢会
足不出户/邀您与种植牙大咖云对话

原价25100元 **十年质量保证**
瑞士ITI种植牙
ITI植体+基台+国产全瓷牙冠
疫情超值价:10800元

刘体亮 / 院长

抽奖礼: 一等奖 3000元种植牙代金券 1名
二等奖 2000元种植牙代金券 2名
三等奖 1000元种植牙代金券 3名

参与礼: 所有参与人员均可免费得医用外科口罩 10个
消费礼: 200元抵 2000元优惠券(每颗牙限使用1张)

直播预告: 3月20日上午9:30-11:00 扫码预约报名

Price campaign & Lottery draw

劲松口腔医院 JINSONG DENTAL HOSPITAL

国际医生节 3月30日

DOCTOR
医者仁心 渡人渡己
国之大器 亦医亦师

National Doctor's Day

Online-to-offline Roxolid Insurance Promotion



Advertisements in subway station



online
offline

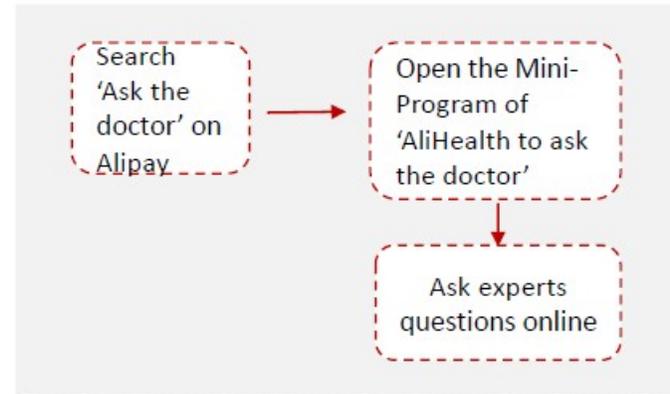


Source: STRMN China DSO survey March 2020

AliHealth's new initiatives during the outbreak were focussed on telehealth and accessibility of medical products



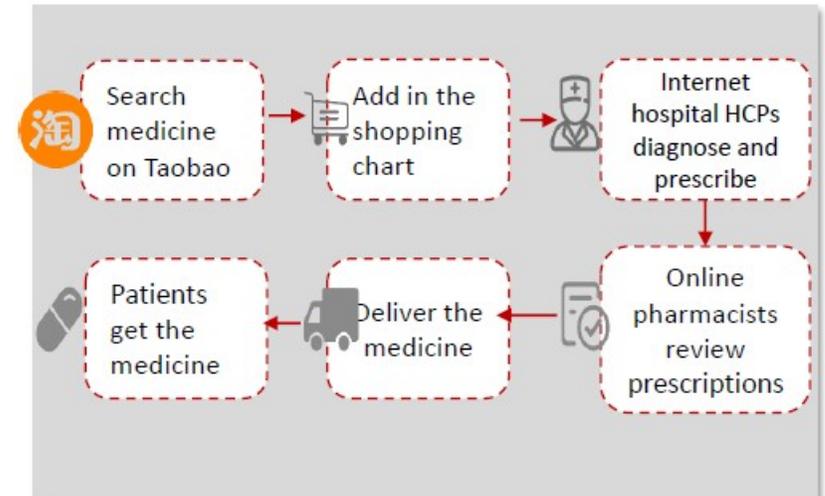
Considering the current shortage of medical resources in Hubei, Ali is taking actions via online channels to minimize the risk of cross-infection of citizens by going to offline hospitals and relieve the pressure of hospitals.



Free online diagnosis service for citizens in epidemic-center

From 25th January, AliHealth has built a free diagnosis portal on Alipay for citizens in Hubei province and organized HCPs across the country to offer them free health care service.

Besides, 41 experts in the fields of rare disease, provide online diagnosis service for rare disease patients across the country.



AliHealth launched online diagnosis and treatment service for chronic disease patients

From 27th February, AliHealth began to deliver medicine for chronic disease patients in Zhejiang province and provide them with personalized online services.

COVID Learnings from China

Infection Control and Prevention

56% of respondents stated that showing the increased safety to patient was key to ensuring patient flow

- Showing that our practices are thoroughly disinfected and prevention measures and controls are in place has been critical to convert on-line inquiries
- The epidemic affects the confidence of patients, they have higher requirements for protective materials after reopening
- Safety first, when making an appointment with patients it is critical to do a good job of epidemic prevention and inspection
- Provide special support to the vulnerable, e.g. special hours for elderly and disabled or special risk groups

56%



Strict Daily Infection Control and Prevention

- But at same time greatly reduce the ability to receive patients



Before the opening hours

Pre-treatment stage

Treatment stage

Post-treatment stage

After the opening hours

During COVID-19, clinics actively resumed work, but due to the requirements of the national health department and the consideration of patient safety, clinics took strict preventive measures, which **greatly reduced the ability of the clinic to receive patients.**

However, clinics tried their best to **let patients know that the clinic has made a full range of preparations to ensure the safety of patients** through a series of new media promotion forms, giving patients a safe treatment environment.

At the same time, **the Straumann Group** actively helps the clinic restore its ability to receive consultation as soon as possible by **providing a large amount of protective materials.**



COVID Learnings from China – Supply Chain readiness

56% stated supply chain readiness as the key driver of bounce-back success

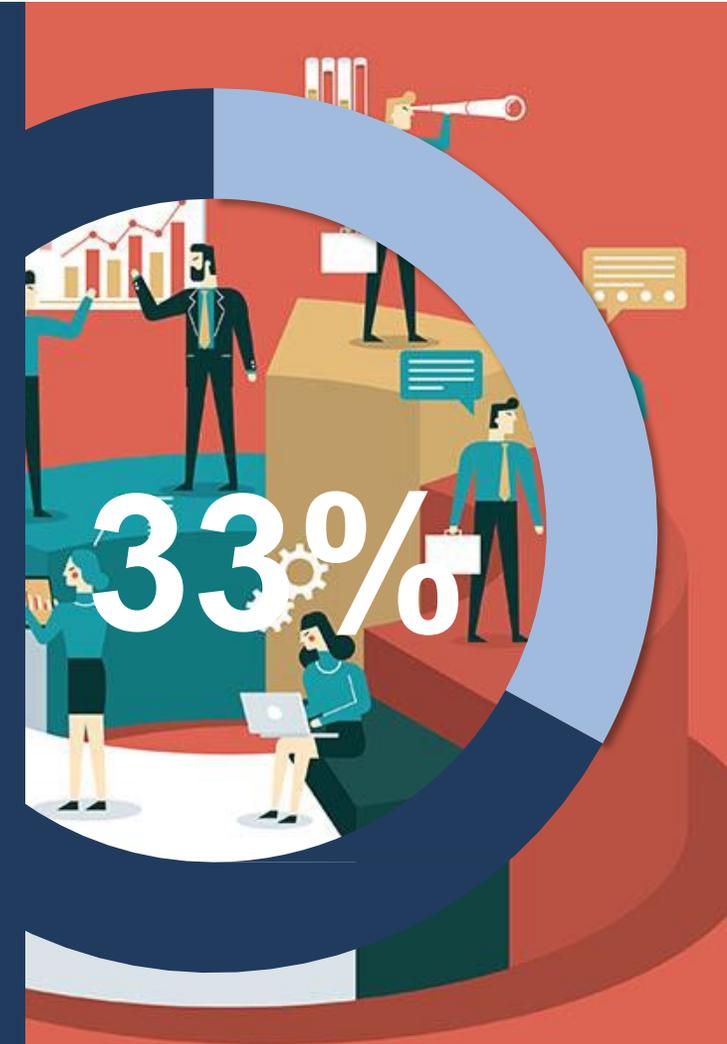
- During COVID we increased our cooperation with suppliers and will continue to focus on reputation and credibility for all key supplies
- Our biggest worry was the insufficient supply of goods from heavily affected countries or smaller suppliers that have suffered from the crisis
- Sufficient supply of protective materials was key to a strong start
- Make sure you have sufficient PPE and stock of critical supplies for every patients/staff and plan for the costs
- Our strategy of only working with stable suppliers has proved its importance again during the current epidemic
- Make sure you have sufficient opening materials and you purchase sufficient oral consumables
- Supply chain pressure is high after COVID as everybody is trying to buy the same products, having strategic partners is key



COVID Learnings from China – Employee Engagement

33% responded that providing a purpose, online training and engagement were most important

- Product/clinical training, psychological counselling and motivation of the team have been the most important activities during lock-down
- Doctor and staff training were hugely important to reduce staff turnover and secure a strong bounce-back
- The outbreak has caused a lot of uncertainty in the team, we fear that turnover rates will increase which is very worrying
- Although the pressure on cash-flow was great, we tried our utmost best to secure the interest of the employees and keep the stability of the team
- During the epidemic period, protective materials were provided to our employees and their families, reflecting humanistic care
- According to the working years of employees and their contribution to the clinic, employees were given a certain degree of subsidies.
- To ensure the safety of employees has been the key goal of our safety and infection control in the practice



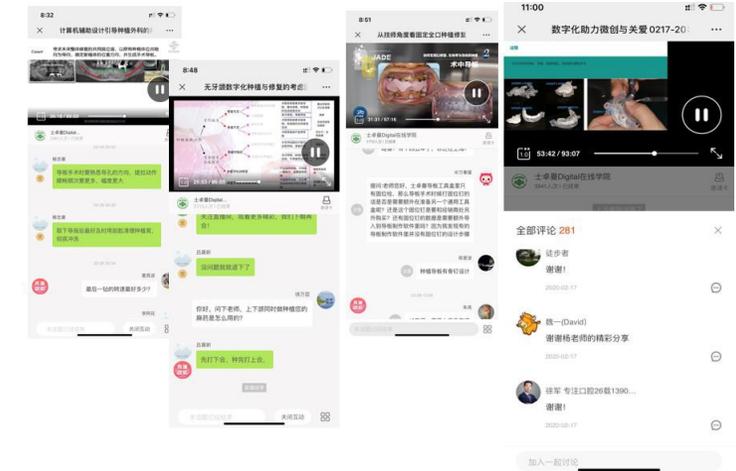
Large number of live on-line trainings offered for Doctors & Practice managers / consultants



- Use the free live broadcasting platform
- PPT webcast, Video webcast, Voice webcast
- Several thousands of people watching online
- Provide questionnaires
- Data export

- Dedicated live broadcasting platform
- Live video interactive shows
- Delivered broadcasting equipment to lecturers
- Support of tens of thousands of online participants
- Training platform is recognized by dentists and KOLs.

- WeChat Mini Program of DSO Consultant Development (Practice Managers) Program
- According to the needs of IT engineers turn to research and development



- Participants very active in asking questions
- Digital technology courses received more attention than traditional courses
- Ability to reach wide audience with low costs

On-line learning for Doctors & Practice Managers with live-experience sharing

BITC Live Online Training Platform for Doctors

- Internal DSO and external KOL
- Some courses attracting more than 7'000 participants per session

WeChat Mini Program for DSO Consultants followed by *Live Broadcast of Experience Sharing*

Wendy Chen

- 《Patient Communication Skill》 Part 1
- 3rd, March 20:00 -21:00

Zheng Zhi

- 《TBD》
- Middle March, Time TBD

Platform:

Wendy Chen

- 《Patient Communication Skill》 Part 2
- Early April. Time TBD

Internal DSO Academies attracting more than 15'000 participants



ARRAIL 瑞尔 瑞尔学院
International Dental Clinic 专业口腔医疗机构
ARRAIL INSTITUTE
straumann group
士卓曼集团

瑞尔公开课 第三讲

《Pro Arch无牙颌数字化种植修复》
瑞尔学院和士卓曼联合举办

课程时间
2/25
14:00-16:00

陆学伟医生
从事口腔种植20年，
累计种植量近万颗，
有丰富的种植外科种植修复经验

个人简介

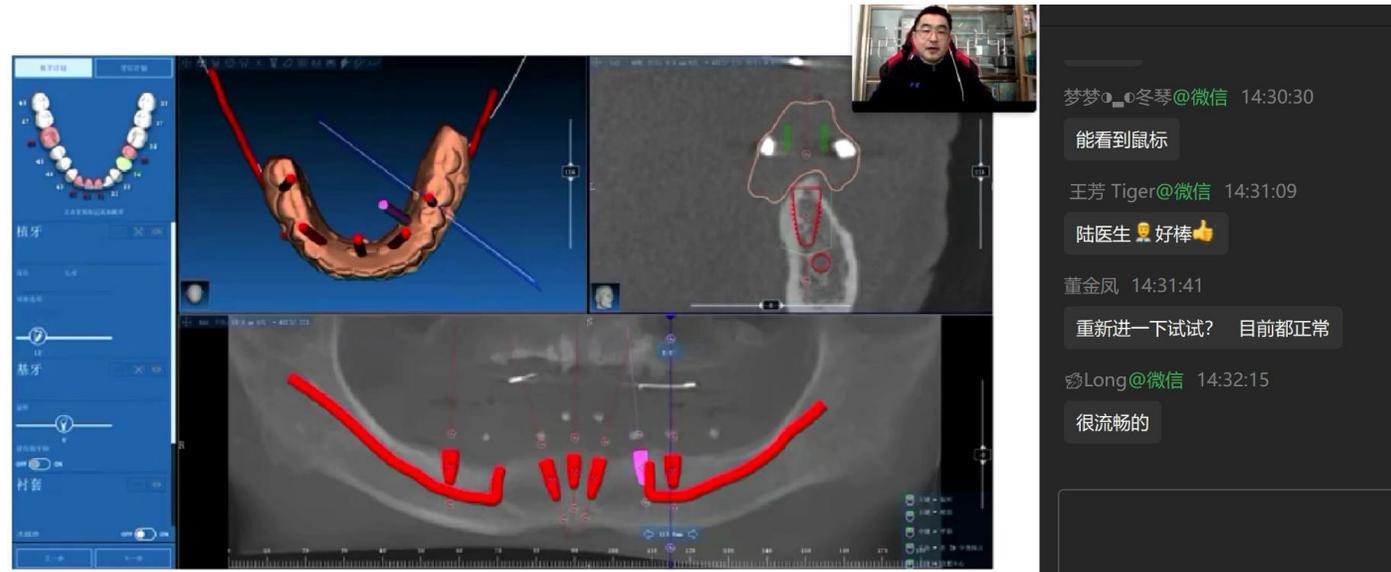
- 主任医师 医学硕士
- 瑞尔上海中心门诊部主任
- 瑞尔集团种植专科委员会副主任委员
- 瑞尔华东区种植技术总监
- Straumann/Nobel/Osstem中国区培训讲师

课程介绍

现今无牙颌种植即刻修复已经成为种植专业的热点话题，复合基台螺丝固位设计灵活多样的特性越来越受到种植修复医生的推崇，本讲瑞尔集团陆学伟医生根据多年的临床实践对无牙颌种植修复设计的分类，解剖原理，种植外科设计及修复原则将做较为详实的解析，同时也对Straumann Proarch系统的使用特点，外科和修复流程结合具体病例进行讲解。

扫描二维码添加课程助手微信
参与到课程中

添加课程助手的时候请备注：
姓名_工作单位_职务类别_专科方向

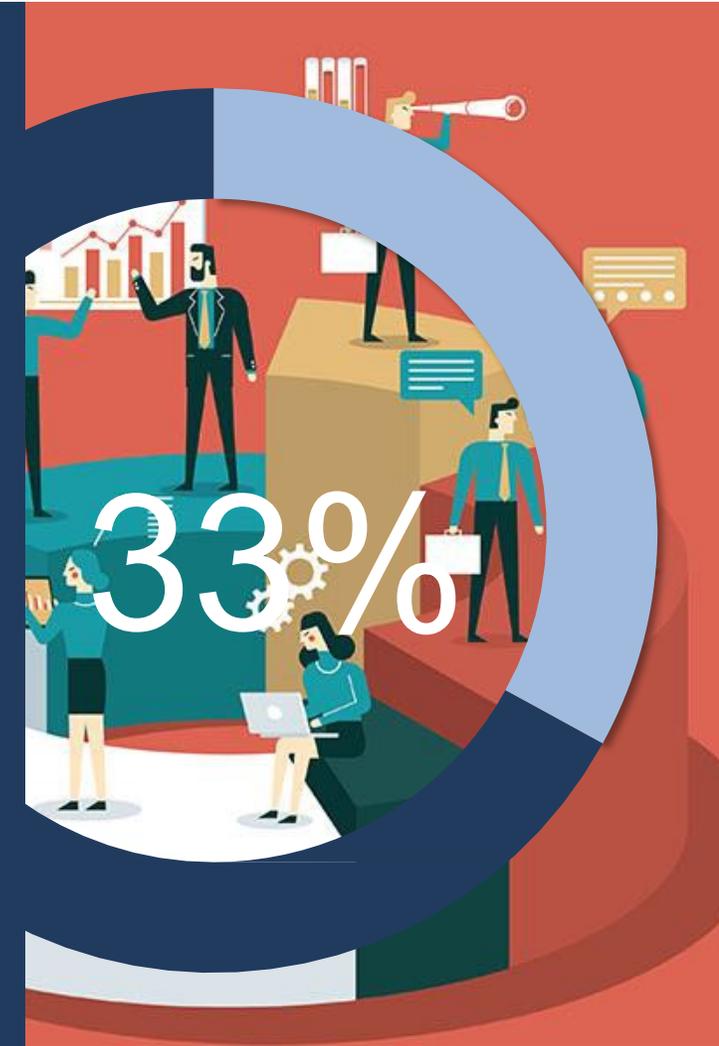


- Establishment of Arrail dental training platform
- Focus on ProArch Edentulous training
- 16,374 online participants
- Due to the huge success, The online academy and partnership will continue post COVID-19

COVID Learnings from China – Financial Liquidity

For 33% of respondents financial liquidity was a major concern

- Particularly for some small and med- sized DSOs the crisis might break the capital chain
- We will slow-down the expansion of clinics and pay more attention to cash flow in the future
- The outbreak has made us pay more attention to financial liquidity and cash-flow



COVID Learnings from China – What respondents wished they would have done

- Not providing **emergency dental** care has resulted in a loss of patients that could have been avoided
 - “We wished we would have done **patient emergency** treatment or at least on-line consulting”
 - Not securing **sufficient PPE** and critical stock slowed our bounce-back in certain indications
- Providing **on-line consults** to patients during lock-down
- We wish we would have been even **more ready to start fast** with more stable supply and operations, and defined processes for prevention and infection control
 - Liquidity management at an early stage in the process

COVID Learnings from China

Learnings you like to share

Care for the team, support the community, upgrade the IT, train the doctors and engage with the patients”

Maintain stable suppliers and do a good job in infection prevention and risk assessment

Provide protective materials to employees and their families during the lock-down, support community care

Stabilize the cash flow, reduce investments and do a good job in epidemic prevention and control

Help in communities and families in need of protective materials

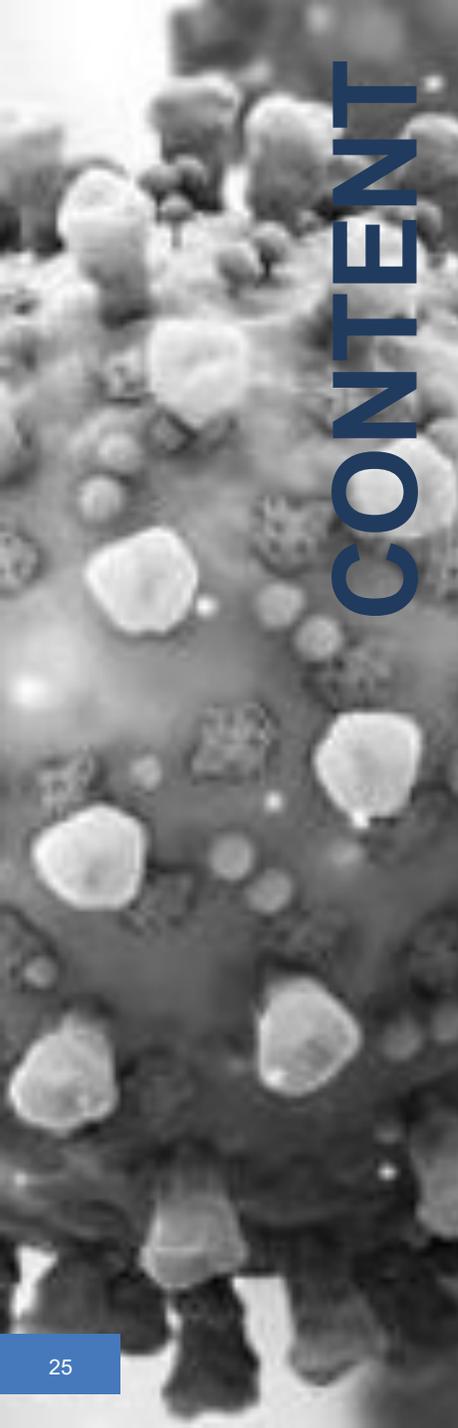
Implement a multi-point practice cooperation mode, it greatly reduces costs and increases flexibility

Provide and Implant insurance Program

Do a good job in clinic disinfection to be ready for returning patients any time

Within one month the practices have provided 150'000 home deliveries of protective materials (5 masks and 2 hand sanitizers each) to existing and potentially new patients to win their attention and loyalty

First of all, ensure the safety of medical care, ensure the safety of diagnosis and treatment, and execute appropriate promotions to win patient flow



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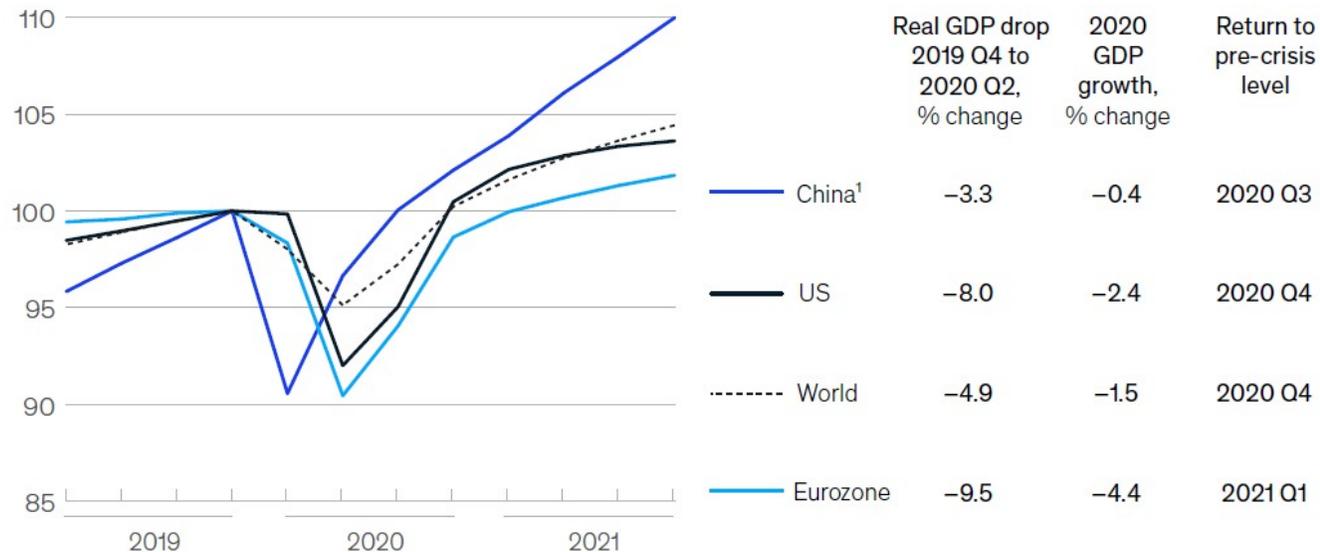
04

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COVID-19 has a major impact on our health, well-being and economic development

Projected GDP growth:
COVID-19 crisis, [scenario that the virus is contained](#)

Real GDP growth, index (2019, Q4 = 100), local currency units



¹Seasonally adjusted.

Source: McKinsey analysis in partnership with Oxford Economics

- In case COVID-19 is contained, global economy is expected to return to pre-crisis level Q3 2020 – Q1 2021
- Economic recovery is dependent on the effectiveness of actions to fight the pandemic and the business impact of step-by-step reducing the total lock-down measures
- Economic recovery driven by consumer confidence and available disposable incomes
- **Learning from China:** consumer confidence stood stable throughout the crisis with accelerating interest on well-being, overall health and healthy life style

The Chinese Economy is beginning to show signs of recovery



- In a BCG survey*, **38%** of the Chinese Consumers said they believe that the worst of the virus is over
- **43%** think that China is safer from the virus than the rest of the world
- However **87%** say they are changing their daily life-style due to the virus
- **93%** try to avoid public spaces
- **77%** expect a recession

Source: Boston Consulting Group March 2020

Sources: Wind; National Development and Reform Commission.
Note: Recovery is gauged by year-on-year daily consumption in 2020 vs. 2019, using the same weekdays relative to Chinese New Year. Particular statistics in this exhibit were drawn from the following sources: businesses resumed, National Development and Reform Commission; recovery in coal consumption, metro passengers, and property transactions, Wind; growth in restaurant transactions, Wechat payment data; apparel sales recovery, public release by the company; growth in Shanghai beauty salon transactions, Xinhua Net; and e-commerce daily sales, Alibaba.
¹Industrial enterprises with annual revenue above 20 million RMB.

* **Source:** BCG COVID-19 Consumer Sentiment Survey, March 12–16, 2020 (N = 1,831, unweighted; representative within ±3% of China national demographics).
Note: Question text: “You mentioned that you are aware of a global virus outbreak. What comes to mind when you think about the virus? Please list 3–5 words or phrases.” and “How much do you agree with each of the following statements about the coronavirus?” Similar responses are categorized together for visual simplicity.

COVID-19 is focusing people's attention on health and well-being

I began to focus on health and started to learn products which can strengthen my immune system



Now I prefer environmental-friendly products and organic products



Fresh, safe products are more important to me than ever before



I will buy the reassuring brands



Preventative Healthcare is the top spending category of Chinese respondents

Fear of the Virus

- **87%** strongly or somewhat believe world in “serious danger”
- **92%** are trying to avoid public spaces as much as possible

Macro Fears

- **76%** strongly or somewhat believe recession will be triggered
- **50%** reduced daily in-store purchase spend
- **36%** plan to spend less on luxury products in next 6 months

Health & Safety

- **52%** plan to spend more on healthcare/ vitamins supplements
- **46%+** plans to spend more on healthy food (fresh/organic)
- **27%+** will spend less on unhealthy products e.g. alcohol & tobacco

Relative Winners

Preventative Healthcare (52%)
Vitamins or supplements (52%)
Organic food (49%)
Childcare (47%)
Fresh Foods (46%)

Fashion Accessories (31%)
Luxury (36%)
Tobacco and smoking (37%)
Vacation/travel (43%)
Eating out/restaurants (47%)

(%): % planning to spend more/less in the next 6 months

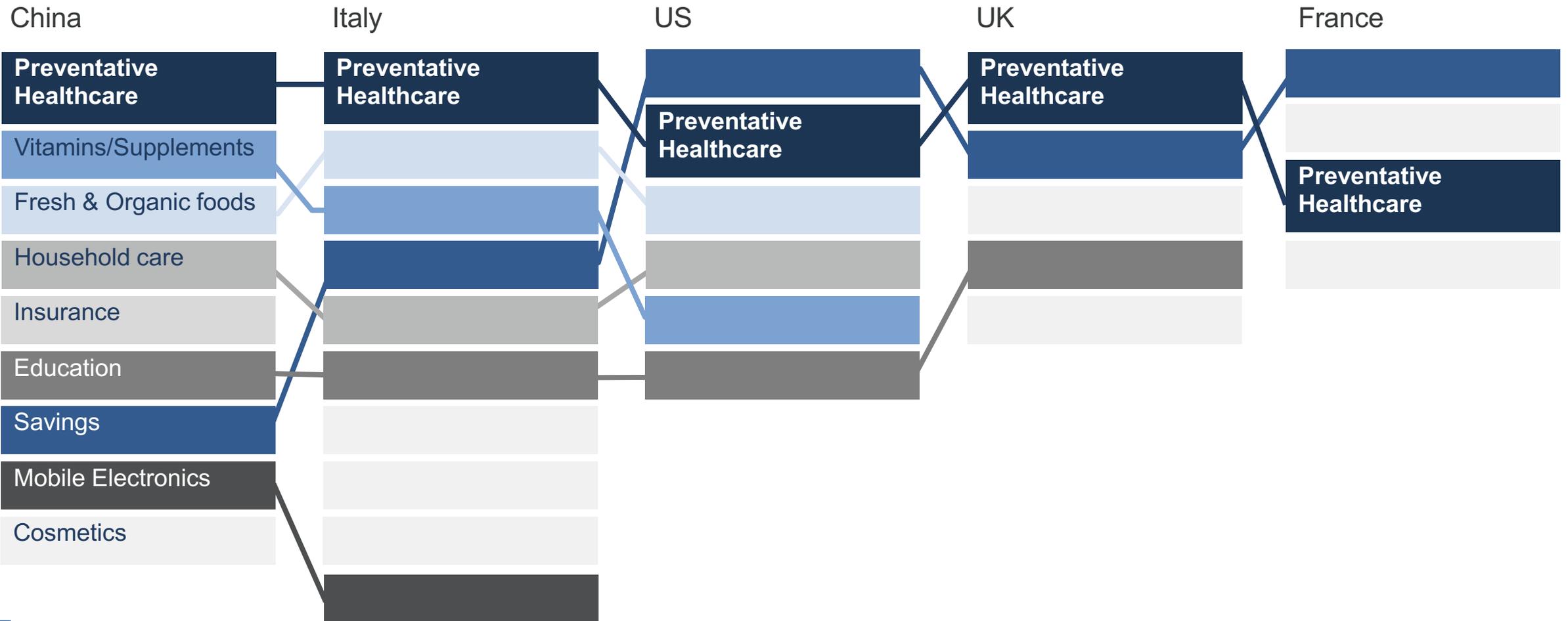
Relative Laggards

Source Boston Consulting Group COVID 19 Consumer Sentiment Survey March 12-16 2020 (N= 1'831 unweighted)

Question text: How do you expect your spend to change in the next 6 months across the following areas? Exclude categories with N<100, “Have you cancelled or reduced spend in any of the following areas due to the Corona Virus? How much do you agree with the following statements about the coronavirus? You mentioned you expect to spend more (selection). Please select up to 3 reasons why

Preventative Healthcare is in the Top 3 winner categories across several countries

Top categories where respondents are likely to spend more in the next six months



Consumers are trying new things during lock-down that could be catalysts to permanent changes

34% Online Consultation



33% Online Education Courses



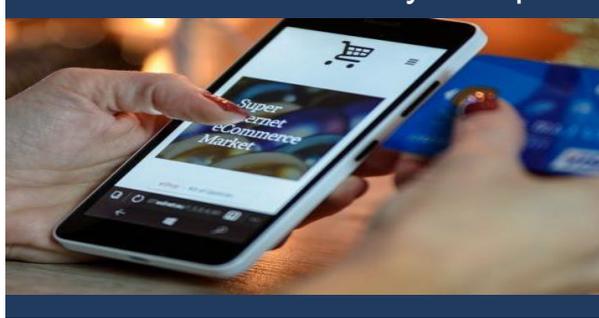
26% Pay for online entertainment



21% Watch live broadcast through mobile phone



18% Social e-commerce/Community Groups



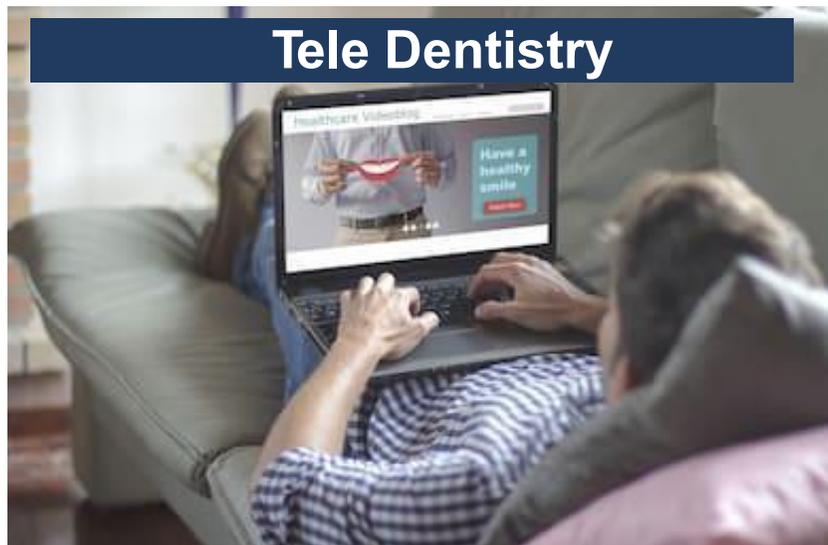
13% Try on-line banking



- The experience of patients may prove to be a catalyst to bring about permanent changes.
- As people – particularly seniors, given their acute vulnerability to the virus – are encouraged to shelter in place
- Remote care can connect patients with doctors digitally, reducing the risk of exposure

Telemedicine has taken a significant surge and is also gaining ADA and insurance endorsement

Teledentistry



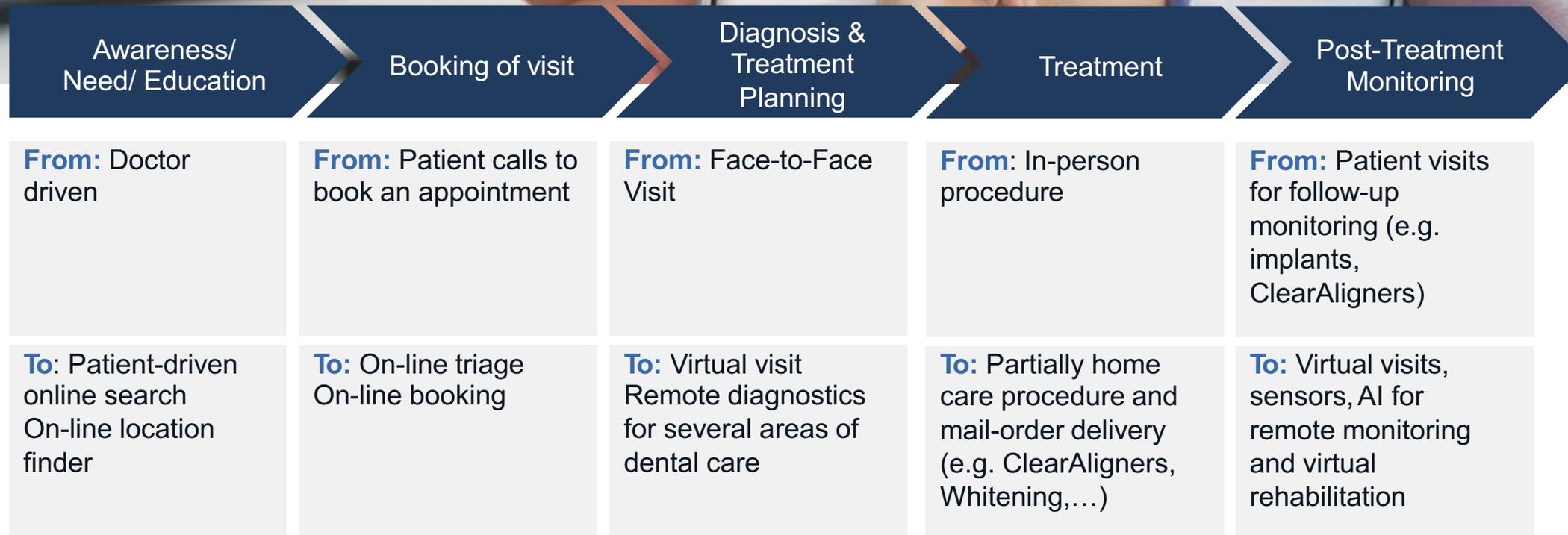
COVID-19 Has led to a review of tele dentistry guidelines in the USA that results in significant opportunities for dentists post-COVID

- Clear guidelines as to how dentists can offer tele dentistry
- ADA codes that can be used (specifically D0140)
- Confirmation from insurance companies that they will cover tele dentistry as "Limited Exam".
- Confirming the dental offices can add the two new ADA codes for tele dentistry on top of the Limited Exam
- The confirmation that tele dentistry can be offered to all patients and not just as a gatekeeper during Corona virus era for detecting emergency cases.

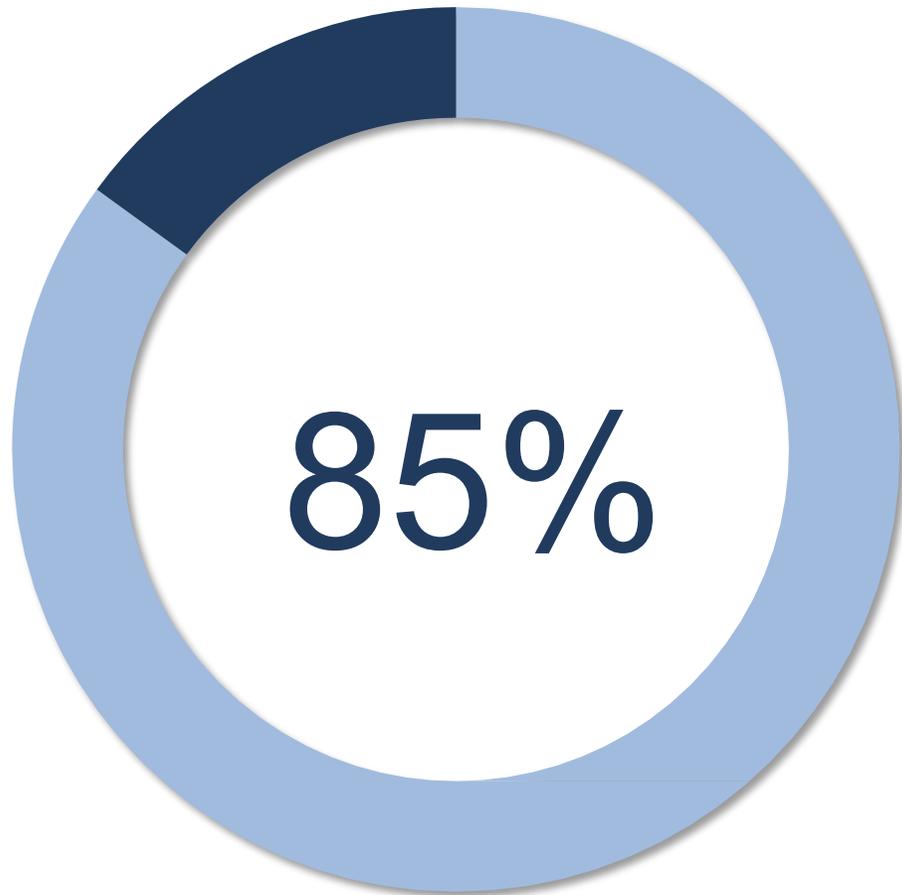
Recent changes also allow Telehealth services to be performed anywhere in the country, where previously the physician had to be licensed in the state where the patient was receiving care lived

The new patient experience will likely accelerate the demand for digital patient journeys

“ I fully believe healthcare will no longer look the way it did pre-COVID. There will be huge effort to further deliver care through virtual interactions, from a device/solutions perspective and a clinician to patient perspective” Medical Director, USA



General COVID-19 Corporate Lessons from China

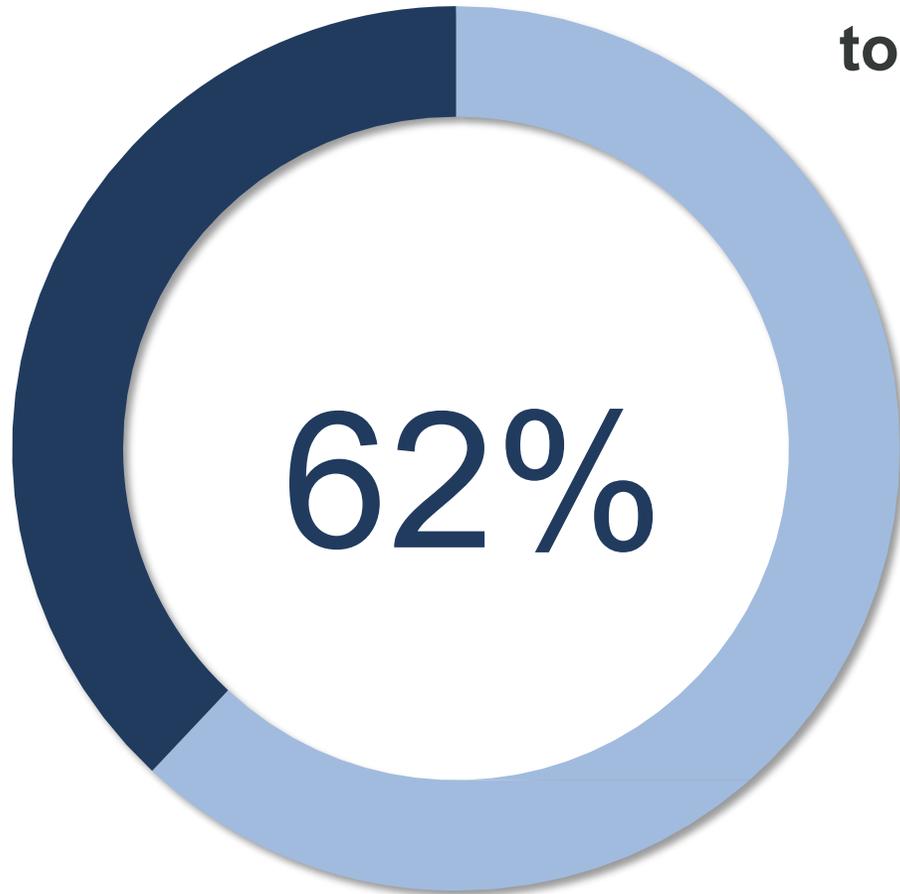


What are the opportunities you see for your business after the epidemic?

- 85%** More investment in e-commerce and new channels due to consumers' newly formed channel preferences
- 81%** Acceleration of Company's digital transformation
- 67%** New product development opportunity driven by consumers' health and safety

General COVID-19 Corporate Lessons from China

What actions has your company taken in reaction to this epidemic



- 69%** Actively develop new routes to the consumer
- 62%** **Increase investments in e-commerce channel**
- 58%** Adjust marketing and communication budget
- 48%** Decrease and tightly control the marketing budgets
- 42%** Reschedule/rationalise the production plan
- 29%** Develop/ extend the portfolio offering to meet the emerging needs
- 27%** Suspend or cancel original investment plans or CAPEX

Learnings from China: KATAR Survey results



PAY ATTENTION

- ... to the **changes of consumer mindsets, consumption behavior and lifestyles**
- **Be agile** in regards to marketing & communication channels, and investment focus



ACCELERATE

- ... **digital transformation**
- Focus on creating a superior patient experience



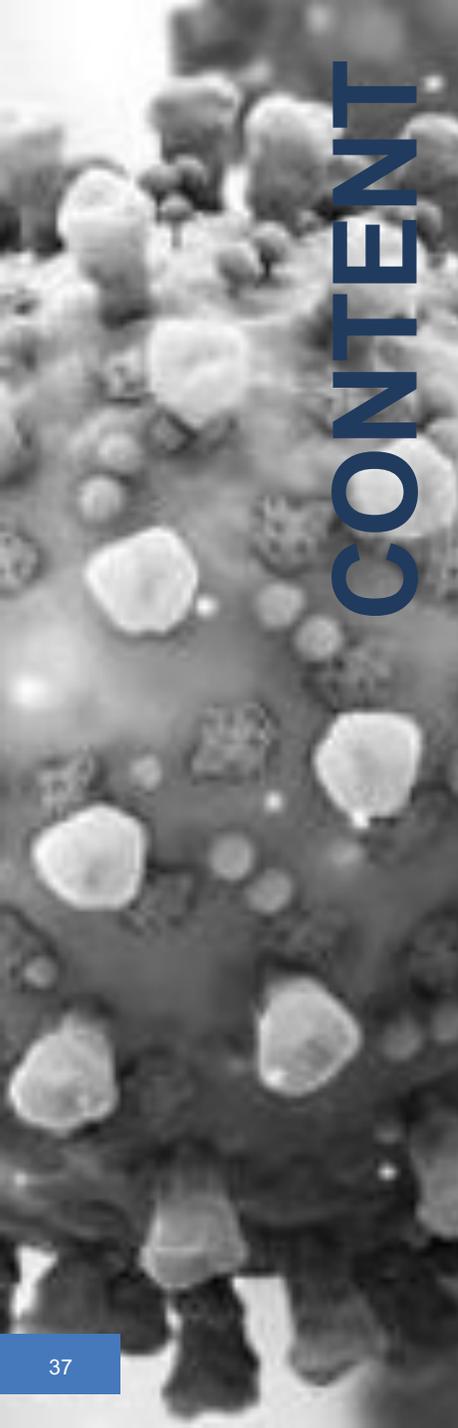
STRENGTHEN

- ... or **consider “brand-owned” digital platforms** and embrace “social eCommerce” to efficiently interact with patients, enhance their stickiness
- Aim for first mover advantage on the new “campaign battlefield”.



PROACTIVELY ADOPT

- ... new digital tools (e.g. virtual consults), immersive experience tools to replicate the physical visit via on-line (teledentistry)



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DSOs should consider a three-part organizational response to COVID

1. Resolve

Address immediate challenges & protect the team and the business

- Protect employees. Adopt new safety and infection control measures
- Organize for emergency dental support
- Redeploy staff flexibly, split teams, plan for preventive back-up solutions
- Speed up digital readiness and provide appropriate tools (office and clinics)
- Proactively create clarity and security for employees. Communicate continuously, openly and with empathy.
- Continuously engage and keep in touch with patients during Lock-down
- Monitor macro-developments and trends that give indication on time and intensity of comeback

2. Return

Create a detailed plan and prepare the organisation for strong bounce-back

- Actively use lock-down for online training for staff and doctors to increase post-lock-down success
- Prepare clinics and HQ for post-crisis openings (safety & infection control, staff deployment, capacity, recruitment, training on new procedures)
- Invest in on-line patient platforms e.g. virtual consult/monitoring, digital marketing, on-line booking. Use lock-down for patient data cleansing.
- Rethink sourcing and supply chain to ensure uninterrupted operations bounce-back
- Manage cash to create agility to go on offense (acquisition of clinics, digital transformation,...)
- Mobilize impactful post-COVID charitable/community engagement

3. Re-imagine

Re-imagine the new normal and be ready for bounce-back

- Prepare for bounce-back coming faster than expected, have detailed plan for return
- Closely monitor new patient behaviour patterns and re-imagine the new normal, spot new patient habits formed during crisis
- Shift patient channel mix. Target channels best suited to maximize reach!
- Plan own patient campaigns & re-engage with the patients fast after the crisis to drive traffic and capture postponed treatment surge
- Prepare processes, resources and IT for longer term implications (digitalization, telemedicine, ...)
- Build scenarios on how you can beat competition in different economic situations (e.g. recession)

“Re-Imagine” strategic opportunities

Acquisitions & Growth

List bold strategic opportunities that the crisis offers such as

- Take advantage of historically low interest rates to finance organic and external growth
- Define M&A opportunities and road-map post COVID-19
- Optimize the supplier portfolio to better hedge against supply risks in the future
- Take bold decision on portfolio or service investments that anticipate changing patient needs (virtual consult, patient home monitoring,..)
- Make sure balance sheet is robust enough to create resilience

Clinical Team

Be attractive for Doctors post-COVID.

- Strongly engage with your doctors and teams and take a human centric leadership approach during lock-down
- Monitor for doctors that have financially faltered during the crisis
- Buy single practices or patient books - in many countries it is expected that between 20-40% of practices will falter during the crisis
- There will also be older doctors who will want to retire/sell their practice earlier as they are more vulnerable to COVID-19
- Actively support the community

New Patient Acquisition

Proactively reach out to patients

- **Existing patients:** Stay in contact with your patients during lock down; virtual consultation, information, access phone number,... Provide newsletters, online information and advertisement. Schedule patients pro-actively before opening; provide confidence over the phone
- **New patient acquisitions:** Be fast to acquire new patients in post-COVID treatment surge. Actively reach out through campaigns. Some patients might be unsatisfied with their doctors (reachability, communication style, lock-down availability, late start), provide special hours for the most vulnerable (elderly, disabled,.. etc)

Imagine how things will differ after the crisis: What does the “New Normal” look like?

Patient Demand

- What are key changes in patients mindsets, behaviors and choices in regards to dentistry?
- How can we overcome the fear of patients to visit the dentist?

Safety & Care

- Will there be sustainable changes in our ways of working?
- Will we need to adapt our workforce deployment and operating models (e.g. to incorporate teledentistry)?
- How will this impact productivity and profitability?

Digital

- How will the surge in online channels and telemedicine impact dentistry?
- How can we profitably benefit from tele-dentistry?
- How to capture the opportunities of digital in the new-normal?

Supply & Operations

- Do I need to “de-risk” my supplier portfolio?
- Will supply chain models shift towards increasing self-sufficiency (e.g. prosthetics) with the accelerated focus on digitalization and resiliency?

Purpose & People Engagement

- How to be a company that people want to return to after the crisis?
- How to be most attractive for doctor recruitment?
- How to ensure employee safety first?

Temporary operational measures to build trust with patients and staff in regards to safety and infection control

1

Regulations & Biosafety*

- Prepare to comply with **biosafety** and **hygienic rules** (social distancing, face masks, high frequency cleaning)
- **“One patient one time”** rule, re-organize waiting room, remove magazines,...
- New practice designs and **layout** (e.g. acrylic glass shields)
- Define **new SOP¹**
- Proactive communication of **patient protection measures** (differentiator)

2

Patient & Referral Flow

- Reach out to **existing patient base**; schedule all possible appointments
- Proactively advertise **re-opening** and **treatment availability** during COVID-19 lock-down
- Run promotions and **virtual consult campaigns**
- Actively reach out to **patients** with no **dental care access** anymore

3

Ensure sufficient PPE & operations

- **Map PPE needs** per patient and ensure sufficient availability;
- Decide on **target treatment portfolio** and ensure sufficient supply
- Explore **on-line consult and on-line post-treatment** monitoring to increase treatment capacity
- Reduce number of visits per treatment by applying immediacy concepts (e.g. implants)

4

Dentists, Clinic & Service Personnel

- **Train new SOP** already during lock-down period
- Ramp-up from **emergency care** skeleton crews
- Phase-back dentists and staff (ideally/if available test for antibodies to target PPE)
- Evaluate shift concept for team (increased protection and longer opening hours)
- Provide strong **psychological and emotional support**

5

Scalability

- Train staff on COVID specific patient communication
- Ensure structured and **documented briefing** and **debriefing sessions** in every clinic
- Drive **best practice** and **knowledge exchanges** among clinics
- Celebrate successes and achievements
- Rework and readjust **SOP** frequently

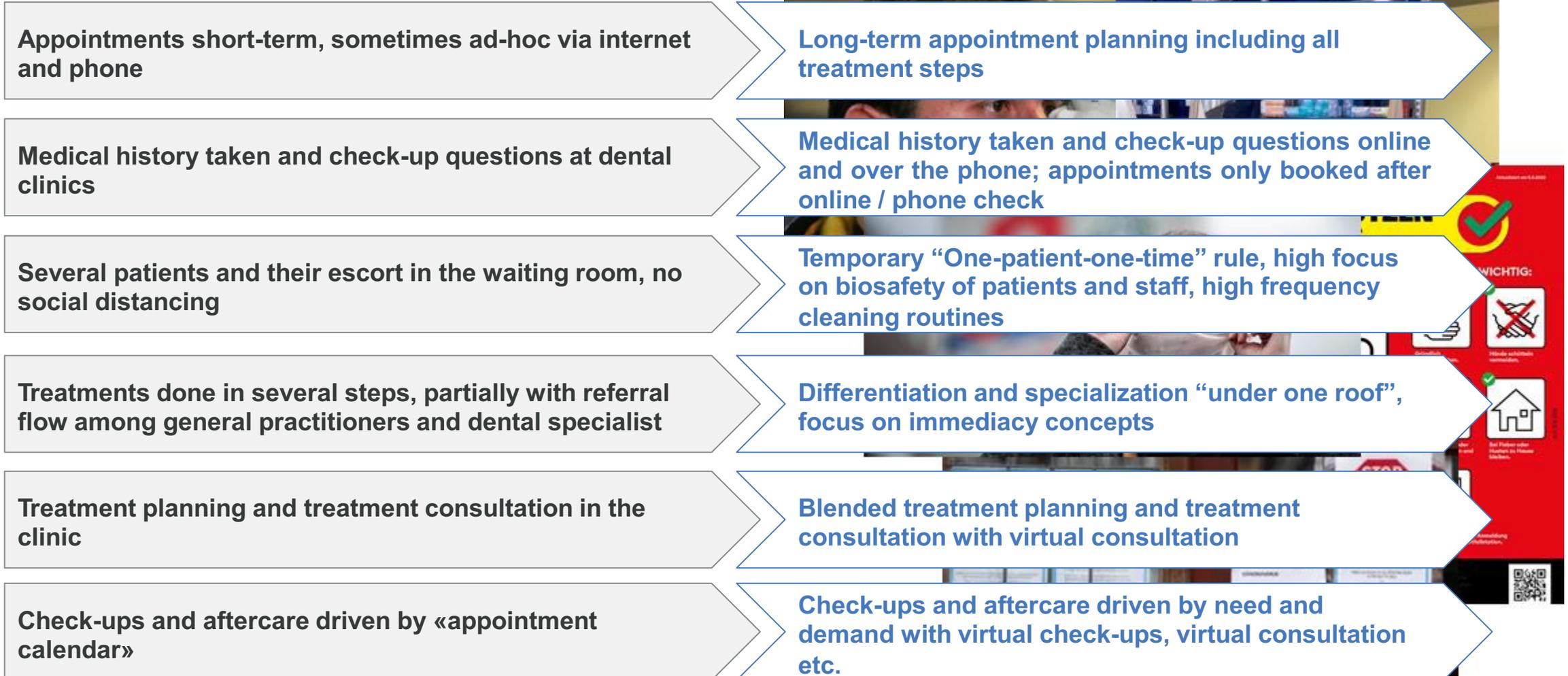
1 SOP = Standard Operating Procedure

2 * As for Straumann guidelines on Post-COVID infection control for DSOs

Patient expectations and behaviors will be different after COVID-19

From pre-COVID-19 ...

... to post-COVID-19 times

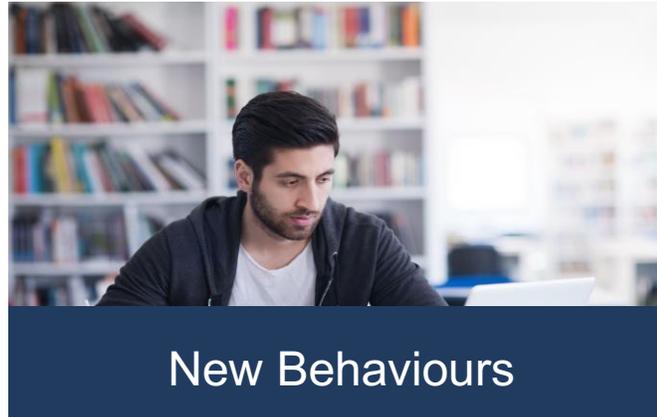


Longer Term implications



Accelerating penetration over the recent period suggests that the move toward digital and online may continue as normality returns. With that in mind, DSOs may wish to consider extending and formalizing recent initiatives for example by increasing their presence on social engagement, increasing the use of digital tools in the practice and supporting virtual consults

Dentists/DSOs that understand how to win patients in a digital world will likely gain market share



Widespread changes in patient behaviour, ranging from the new “shelter at home” experience, new communication preferences, the role of on-line media, and the **importance of health** and family and a fresh reset of price/value relationships

Dentists/DSOs that have a systems in place to change at the pace that patients are changing will win



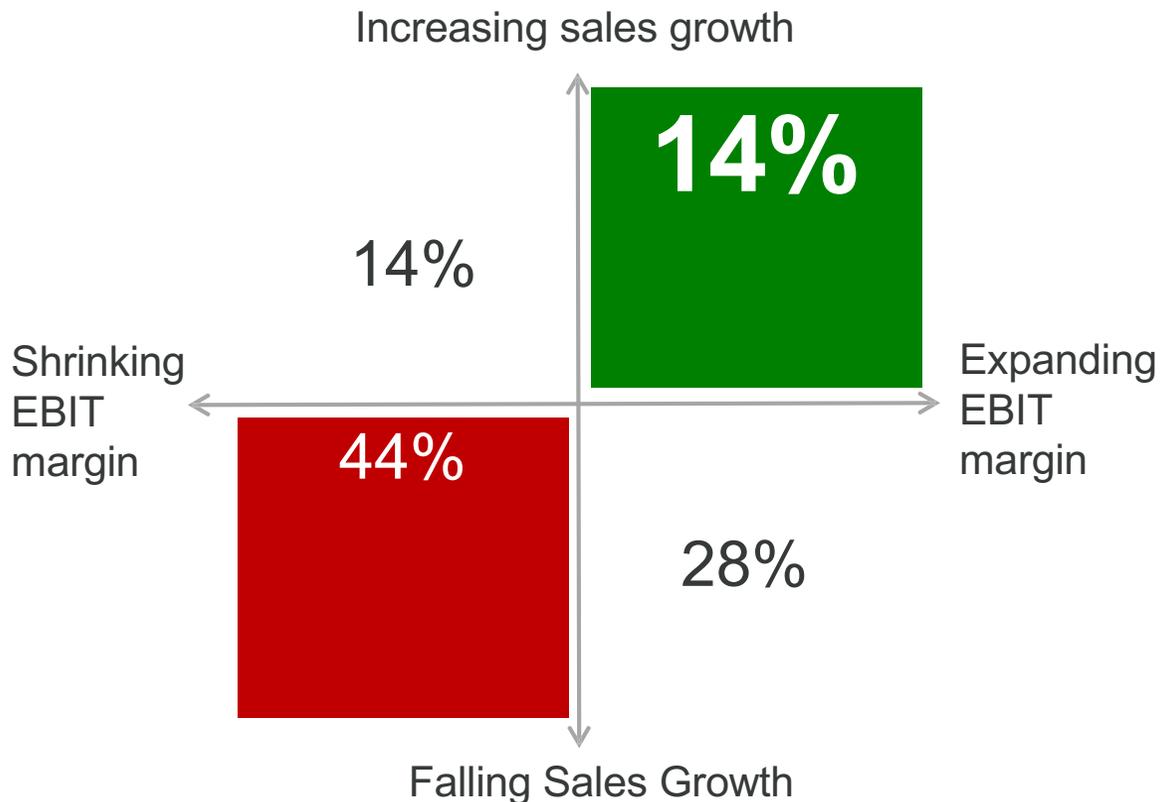
Optimisms and highlighting of emotional benefits of “brands” for the betterment of community will be valued in the long term

Sustainability, reemerging, redefined

DSOs that take a human centric, fearless and bold leadership approach will be noticed and valued

According to Boston Consulting Group, some companies flourish in recessions!

14% of companies improve growth and margin in downturns, while 44% decline in both ...



4 Moves to pre-empt adversity



Prepare:

- Stress-test
- Resize



Pre-empt

- Act early and be fast
- De-average



Grow

- Invest in growth
- Long-term perspective – “Re-imagine” and adjust to the next normal

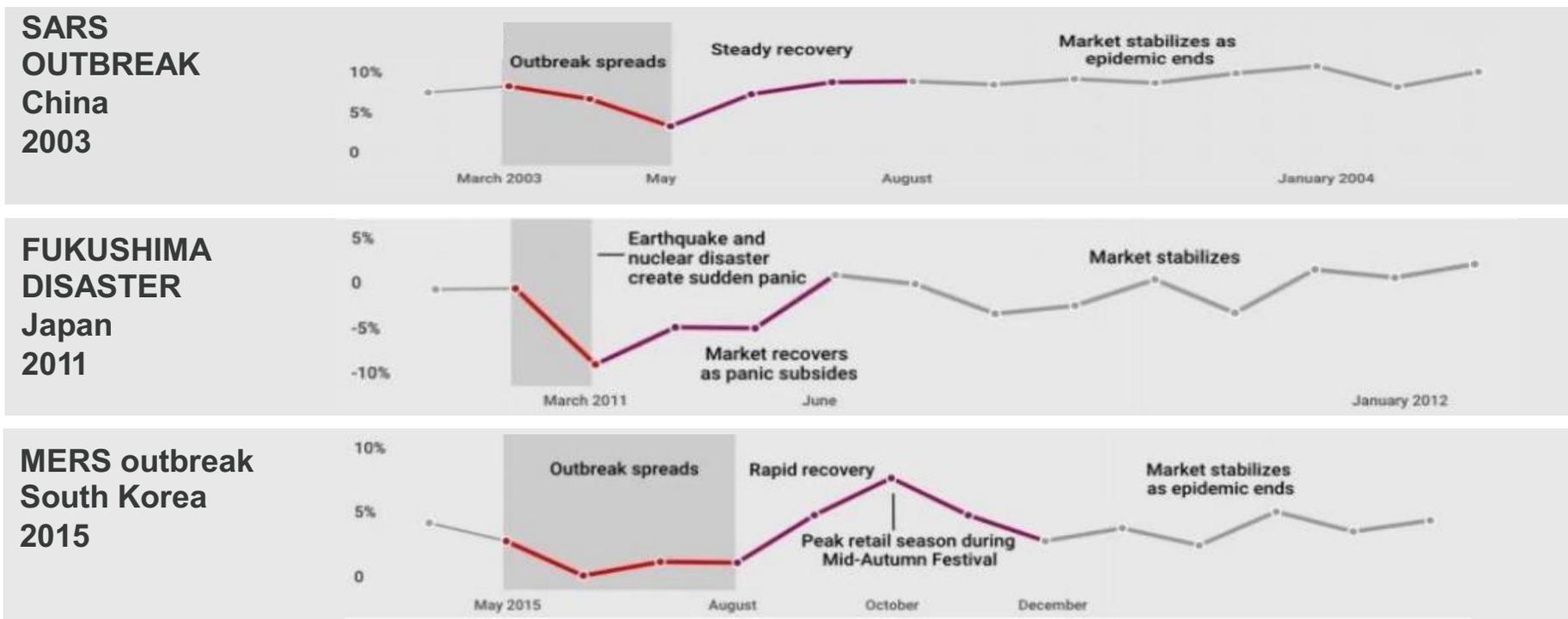


Digitally transform

- Accelerate change
- Have a compelling investor story

Precedent – Previous events showed elasticities in consumer behaviours

Year-over-Year Retail Growth



Previous epidemic/ disasters have shown short term impact, but generally recovery is seen over a period

However, there is uncertainty about the size, duration, and shape of this crisis as two important contexts remain

1

Timeline for a vaccine still 12-18 months earliest

"Coronavirus Vaccine Still 12 To 18 Months Away," Says WHO As Covid-19 Global Count Soars

GENERAL NEWS

In a massive and worrying statement, the World Health Organisation (WHO) on Saturday has said that the vaccine for coronavirus will still take at least 12 to 18

Written By [Navashree Nandini](#) | Mumbai | Updated On: March 28, 2020 10:08 IST

NEWS

Coronavirus 'exit strategy' could be months — or years — away

By [Mary Kay Linge](#)

March 21, 2020 | 10:00am | Updated



Significant economic impact

2

Without a vaccine no Government has a clear "exit" strategy

Risk of the pandemic to become a recurring nightmare for some time

Summary

- The pandemic has resulted in a **crisis for the economy** and has strongly affected dental service providers around the world
- There is **uncertainty** about the size, duration, and shape of the crisis by country and high unemployment undermines business confidence.
- A shock of this scale is likely to **create a discontinuous shift in the preferences and expectations** of employees and also patients that will become more clear over time
- However, two trends are already evident. The first is a **massive shift towards digital platforms** and online channels. The second is the enormous **challenge to build “Trust”** and **remove the high level of anxiety** after distancing measures are lifted
- China has shown that **DSOs can re-emerge out of the crisis stronger!**. **Readiness and speed** to bounce-back is key, **securing staff and patients safety** plus **re-engaging with patients** early are critical for a successful bounce-back as is a robust sourcing strategy and partners
- Staying close to employees. Provide them with a **purpose**, use the lock-down time for **on-line education** of the team, **planning** the bounce-back and **re-imagining the “new normal”** are critically important



#TogetherStronger

Petra Rumpf

Petra.rumpf@straumann.com

+41 (0) 79 4685 626

<https://www.straumann.com/>

For updates Visit:

<https://www.straumann.com/group/en/discover/covid19.html>

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UNITED FOR EXCELLENCE

The Straumann Group is a global leader in tooth replacement and esthetic dentistry.

Committed to supporting our customers in achieving profitable growth and successfully navigating through **COVID-19**

MORE THAN CREATING SMILES – RESTORING CONFIDENCE

7,000

• Employees worldwide

#1

• In Tooth replacement worldwide and in the US

#2

• ClearAligners
• **Leader in AI driven home monitoring tools for patients**

>100

• Countries
• **Implant, ClearAligner & CAD-CAM production in the USA**

>1 million

• Doctors trained since our foundation
• **Largest on-line training platform for doctors and staff**

1 second

• Someone is treated with a Straumann Group product

Two major test-types detect either active or past infections

Types	Technology	Details	Availability
Molecular Detect genetic material of the virus	RT-PCR Reverse transcription polymerase chain reaction	<ul style="list-style-type: none"> Steps of amplifying and detection of viral genome identifies presence of virus Predominant testing method globally and most accurate Lab based tests typically takes ~3 days for results Near point of care takes <1 hour for results 	Growing availability varies by geography; Rapid PCR test received emergency FDA approval
	Isothermal amplification	<ul style="list-style-type: none"> Rapid diagnostics with a single step identification of virus Typically near point of care (e.g., hospitals, clinics) taking < 20min 	Recently approved tests
	CRISPR	<ul style="list-style-type: none"> CRISPR protein used after isothermal amplification to detect viral RNA presence 	Experimental / proof of concept
Immunological / serologic tests Detect antigens or antibodies	Lateral flow tests	<ul style="list-style-type: none"> Detects presence of antibodies and antigens based on binding to enzymes Negative test results don't imply lack of infection but just antibodies below detection limit; test most effective 8-10 days since infection started 	Starting to become available in Europe, only one in EUA in the US Over 30 tests under consideration
	CLIA: Chemiluminescence Immuno Assay ELISA: Enzyme linked immune sorbent assay	<ul style="list-style-type: none"> Lateral flow tests are shorter, point of care, self administered (like a pregnancy test), Typically <15 min CLIA / ELISA tests are primarily lab based / near point of care; typically takes <1 hour for results 	



Improved speed and scale of live case confirmation will be critical to facilitating test and trace strategies for lower burden settings or for countries that have successfully contained initial outbreaks and are moving towards economic restart

Antibody tests with scaled distribution can enable recovered populations to resume normal activity

Source: https://www.fnddx.org/covid-19/pipeline/?section=immunoassays#diag_tab <https://www.nature.com/articles/d41587-020-00010-2> , CDC website, <https://www.cepheid.com/coronavirus>, <https://www.360dx.com/coronavirus-test-tracker-launched-covid-19-tests>,

When facing such a tsunami, companies make four mistakes



Inadequate Discovery

Optimism bias, lack of adequate 'sensing mechanisms' (e.g., escalation failures), over-reliance on past patterns, risk rationalization

Industrial manufacturer: pushed out fix timelines for failed product more than 12 times. Top management optimism bias was called out multiple times by regulators, politicians and other observers



Constrained Solution Design

Many crises have a technical core, which needs new solutions to be invented (e.g., BP top hat) or imported anew into the sector/ geography

Energy company: Many public failures to fix process safety issue before success. Challenge was that the fix needed new engineering innovation



Slow or Bad Decision Quality

Groupthink, political pressures, high-emotion situations; Unfamiliarity – pattern recognition-driven thinking fails; Desire to wait for more facts slows response

Challenger disaster: NASA engineers pressured Thiokol to change their 'no-launch' recommendation (Thiokol shifted their stance to satisfy their biggest customer) in spite of a well-understood technical failure on O-rings.



Inadequate Delivery (Execution failure)

Chaos during disruptions frequently translates to lack of accountability and direction, 'operations addiction' on the part of top management, leading to failures of execution

Automotive manufacturer: Was criticized for multiple aspects of recall activity (e.g., unclear terms and conditions, inadequate call center staffing, other challenges)