

CASE STUDY

Pelican Landing Dental Soars to New Heights with Polaris' Fractional COO Support



For dental patients in Bonita Springs, Estero, and throughout Southwest Florida, Pelican Landing Dental delivers high-quality and comprehensive dentistry services in its family-friendly office.

To build upon its success, owners Rich and Lacy Gilbert wanted to strengthen its operations and effectively scale the business. This required a consulting partner that would be able to provide strategic planning, a proven process, and a comprehensive understanding of the dental industry to ensure success.

Planning & Executing for Growth

To strategically position Pelican Landing Dental for both immediate and long-term success, the Gilberts enlisted the expertise of Polaris Healthcare Partners. With a comprehensive understanding of the industry and a track record of successful outcomes, Polaris conducted a thorough assessment of the business and provided guidance for the next steps. Building on a successful history of collaboration, having previously engaged with Polaris founders on two Discovery Days and strategic consulting for expansion initiatives, the Gilberts decided to enhance their partnership by appointing Polaris as a fractional Chief Operations Officer (COO).

In partnership with Pelican Landing Dental's ownership, Polaris executed the following steps:

- **Assess Current Leadership Team:** Polaris conducted a thorough assessment of the current leadership team's strengths, weaknesses, and skill gaps.
- **Define Clear Vision and Goals:** Polaris helped ownership develop a clear vision and set specific, measurable goals for scaling and growing the practice. Polaris also helped ensure alignment with the practice's mission, values, and long-term objectives.
- **Restructure Leadership Roles:** Polaris helped the team make tough decisions to realign some roles and terminate others.
- **Leadership Development:** Polaris helped Pelican align and invest in leadership development programs to enhance leaders' skills and capabilities. This was supplemented with a team-building session focused on the cycle of service, including the patient experience, scheduling, treatment planning, and case acceptance.

Pelican: Aligned and Set Up for Ongoing Success

As a result of Polaris' focused engagement, Pelican was able to create and hire new positions to help the business grow. The Pelican team is now fully optimized, which will **help the practice continue to grow through recruitment, retention, and training.**

Additionally, Polaris assisted in **crafting and integrating business performance metrics** tailored to the future trajectory, including clinician chair utilization, collections percentage, new patient acquisition aligned with target demographics, call center effectiveness, and revenue expansion. This collaboration has empowered the Pelican team for future success.

With ongoing coaching and guidance from Polaris throughout the engagement, the Gilberts have **acquired a systematic framework for problem-solving, change implementation, and operational efficiency**, enabling them to further refine the foundation established with Polaris' consulting assistance.

“All of our engagements with the Polaris team were very positive. I only wish we had engaged them sooner.”

- Rich and Lacy Gilbert

**POLARIS HEALTHCARE'S
ENGAGEMENT ENABLED
PELICAN LANDING DENTAL
TO CREATE AND OPTIMIZE
NEW POSITIONS, BOOSTING
GROWTH THROUGH
STRATEGIC RECRUITMENT,
RETENTION, AND TARGETED
PERFORMANCE METRICS**

