

## CASE STUDY

# Polaris Helps Secure Dental Build a Sustainable Future



Secure Dental, co-founded by Drs. Noel Liu and Nazish Jafri, is a successful dental practice on a mission to transform its patients' lifestyles through personalized and remarkable dental care. The practice, which was founded in 2012 in Peoria, Illinois, experienced meteoric growth in its early years, quickly expanding to multiple locations. However, operational and financial challenges also increased as the company grew. To avoid future financial stress and optimize the group practice for a more sustainable future, Drs. Liu and Jafri engaged the Polaris Healthcare Partners team.

## Accelerated Growth and Growth Pains

Drs. Liu and Jafri knew after opening their first practice that they wanted to expand. This ambition quickly led to multiple locations in the areas surrounding their home base of Peoria. However, their operational and strategic foundations did not grow as quickly as the practices. Over time, the additional locations spread resources thin, leading to inconsistent performances, challenges in managing multiple sites effectively, and recruiting and retaining associates. Plus, due to lack of visibility into finances across the different practices, Drs. Liu and Jafri struggled to make data-driven decisions for the business.

*“We were so ambitious when expanding the locations that we did not pay as close attention to operations or HR. All the mistakes that you can think a young group practice would do—we did them all.”*

- Dr. Liu

## Addressing Business Gaps with Polaris

When Dr. Liu met the Polaris team at an event and began sharing his story, **both parties recognized that there was an opportunity to build upon the group practice's successes while also improving its processes for better financial stability and sustainability.** This moment of clarity led to a consulting engagement between Secure Dental and Polaris, which started with a comprehensive review and overhaul of Secure Dental's operations and strategy.

Polaris first performed an operational assessment, which included a detailed look at each of the secure dental locations, evaluating its performance, expense control, and operational efficiency.

This work resulted in a comprehensive understanding of which locations were underperforming, which enabled Drs. Liu and Jafri to make the difficult, but necessary decision to restructure by closing or selling underperforming offices for the benefit and health of the group practice's overall profitability.

Polaris then worked in partnership with Drs. Liu and Jafri to **develop key performance indicators (KPIs) for sustainable success** and visibility aligned to the individual needs of the group practice. Polaris also helped the Secure Dental operations team to centralize revenue cycle management, marketing, operations, and supply chain management to streamline operations and gain a holistic view into the entire company. These efforts enabled their team to make more strategic decisions for the organization.

To address recruiting and staffing challenges, Polaris helped guide the creation of a strong internal culture, emphasizing team investment and development to position Secure Dental as a desirable practice for both new and seasoned clinicians.

## Realizing a Sustainable Future

As a result of Polaris' support, Secure Dental's operational efficiency improved significantly, with **each location operating at maximum capacity and efficiency**. With a clear understanding of their financials and the implementation of strict budgeting and forecasting the resulting insights, the team was able to recalibrate to focus on quality over quantity when considering future investments.



One of those investments was a multimillion gift from Drs. Liu and Jafri in their alma mater, the NYU College of Dentistry. The gift is being used to enhance the College's programs in implant dentistry and improve access to dental education and care, including supporting student scholarships. This pledge also supports the Veterans Oral Care Access Resource (VOCARE), a veterans initiative program to care for their dental needs especially with dental implants, a mission that is important to Drs. Liu and Jafri. Not only did this hold meaning for the esteemed dental leaders, but it also created opportunities for Secure Dental to connect with new talent for open positions.

Today, the practice is considered a "second family" for many of its associates, and boasts high retention rates. They have 11 offices across state lines, and Dr. Liu is a passionate mentor and guide for associate doctors in their transition from students to clinicians. He has built a **successful framework for model, mimic, and mastery flow** to help them achieve their personal, professional, and financial goals and efficiencies.

Secure Dental plans to continue its expansion in a measured and strategic manner, focusing on locations that align with their demographic and operational criteria. The practice is committed to maintaining operational excellence and financial health as it grows, helping positioned Secure Dental for sustained success.