



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Tuesday, September 12, 2017, 6pm

## “Training the Investor Brain”

### Matthew C. Johnson, JD



Matt joined Brandes Investment Partners in 1993 and is responsible for sales management, product distribution, and business development, as well as developing strategy, planning and execution of the firm’s field sales efforts. Prior career highlights include Product Manager for Global, Global Balanced, and U.S. Equity Strategies and Regional Director of Marketing and Client Services. Matt is registered with the SEC as an Investment Advisor and is also registered with FINRA as a Broker.

### “Training the Investor Brain Discussion Outline:

In recent years, behavioral finance has become really popular. But taking a step back, one of the biggest questions we have about this field is -- “So what?” There are so many behavioral finance theories. But where is the practical application? What can we actually do with this stuff?

In “Training the Investor Brain,” we talk about some of those theories that help explain why sometimes investors make poor choices. And, just as important, we share practical tips and tools you can use starting today that are designed to help you be more rational and long-term focused.



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Tuesday, October 10, 2017, 6pm

## “Taming the Overhead Best- Profitability Solutions for the Entrepreneurial Dentist”

### Mark Battiato



Mark graduated from Arizona State University with a B.S. in marketing in 1979. He started his own marketing company managing 60 employees nationwide. He then positioned with 3M Company for five years in the National Advertising Division and was the recipient of several awards for his sales and marketing performance throughout his tenure with 3M.

Mark is now the CEO and Director of Practice Growth at The Growth Into Greatness Institute, which he co-founded with Deb Castillo.

He has analyzed over 400 dental practices in the United States since 1992 in assisting in helping hundreds of dentists in reducing overhead, simplifying their business, improving net profit, increasing time off for dentist and team.

### Deb Castillo



Deb comes from a strong and varied background in dentistry, from overseeing a successful private care dental practice in San Diego, California for several years to joining an innovative dental software company. Beginning as an Applications Specialist, she quickly moved to National Director of Training where she worked with dental practices from around the country.

In addition, Deb counseled practices in crisis. As a turn-around specialist, she determines the areas that need immediate attention and assists the doctor and staff in creating an effective plan to correct the problems and improve cash flow.

As a co-founder of the Growth Into Greatness Institute, she understands that developing a fiscal management system is the foundation for success. Using her ability to analyze a cash flow statement and a balance sheet and to locate the problem areas, Deb is able to develop solutions for lowering overhead and increasing revenues, key building blocks in establishing a profitable practice.

### “Taming the Overhead Beast” Course Outline and Objectives:

Understanding how to manage the expense side of any business is crucial to achieving sustainability and success. Knowing what is necessary for the practice to be profitable and feeling that one has the ability to create cash reserves gives a business owner “peace of mind.

Just as there is a reasonable amount of debt service a business can tolerate there are also reasonable costs that a dental practice can maintain and still remain profitable. We will not only discover what is ideal as far as costs but each doctor will be able to compare their current reality to the ideal. Attendants will receive a tool that will combine the Profit and Loss and the Balance Sheet into a cash flow statement to use to manage the practice to the highest levels of profitability.

- Establish proper standards and norms for a successful dental practice and learn exactly where your practice falls in comparison
- Learn how to organize the financial management of the practice in a pattern that lowers overhead and promotes profitability
- Leverage your practice to capture the potential of your team to achieve your practice vision



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Wednesday, November 8, 2017, 8am

**AM Session: “Predictable Ceramics: This Course Will Take a Detailed Look at Ceramic Dentistry Today”**

**PM Session: “Ten Things That Will Help My General Practice, Without Breaking the Bank: Overview of New Technologies with a Clear ROI”**

## Parag R. Kachalia, DDS



Dr. Parag R. Kachalia is a Tenured Associate Professor and the Vice Chair of Simulation, Technology and Research and is a team leader within the University of the Pacific’s prestigious complex and esthetic rehabilitation program. He is a fellow of the American Dental Education Association’s leadership institute as well the American College of Dentists and International College of Dentists. In addition he is a researcher, as well as a published author in the areas of dental technology, digital diagnostics, contemporary fixed prosthodontics, and financial management.

He has lectured internationally in the areas of adhesive dentistry, cosmetic dentistry, photography, CAD/CAM technology, fixed prosthodontics, treatment planning, erosion, and diagnostic technologies. Dr. Kachalia acts a consultant for many dental materials/dental technology companies and helps guide product development.

### **AM Session: “Predictable Ceramics” Course Outline:**

The world of metal-ceramic dentistry has had a good track record; however new ceramic materials in the marketplace may ultimately serve as a predictable alternative for these restorations. The course will look at specific materials, proper preparation design, and a decision tree as to when all ceramic material should be considered. This course can be presented in either a lecture only format or in combination with a hands-on workshop.

#### **At the conclusion of the course participants will:**

- Gain an understanding of the advances in ceramic dentistry over the last five years
- Understand preparation design as it relates to new ceramics in the marketplace
- Understand the pros and cons of various ceramic systems as it relates to clinical decision making
- Be knowledgeable in proper cementation technique specific to each ceramic system

### **PM Session: “Ten Things That Will Help My Practice Without Breaking the Bank” Course Outline:**

This is a lecture only course that will look at current advances that will aid the average general practice. The focus of this presentation will concentrate on technologies and materials that will improve efficiency, delivery of care, patient experience, and/or practice management. Furthermore the bulk of the program will look at advances that require an investment of \$5,000 or less, yet generate a measurable return on investment.

#### **At the conclusion of the course participants will:**

- Identify key technological advances that will aid your practice on Monday morning
- Learn strategies to immediately implement the use of newly purchased technology
- Learn strategies to use technology as a distinguishing factor from the practice down the street
- Gain an understanding of how technology investment can lead to a decrease in overall staff costs



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

**Tuesday, November 28, 2017, 6pm**

## **CPR Certification (Members and Staff)**

**Stephanie MacGilfrey**, Program Director at UC San Diego Center for Resuscitation Science & Outreach

**Course Outline:**

CPR Training for Healthcare Providers is designed to provide a wide variety of healthcare professionals the ability to recognize several life-threatening emergencies, provide CPR, use an AED, and relieve choking in a safe, timely and effective manner.



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Tuesday, December 5<sup>th</sup> 2017, 6pm

## “Fraud in Your Dental Practice: How to Reduce Your Risk and Your Losses”

### Doug Fettig, CPA, MBA



Doug Fettig, CPA, MBA, is a Consultant within the Dental Services Group at Aldrich CPAs, Advisors and Consultants, ranked as one of the top 100 accounting firms nationwide. With over 25 years of business and consulting experience, Doug has the unique ability to understand dentists' needs and help them grow efficient and profitable practices. His insight allows him to effectively communicate business concepts to dental practices while strategically addressing tax, investment, and retirement planning needs.

Doug has spoken at numerous dental seminars, academies, study groups, and vendor forums around the country and he is known for his energetic, engaging, and entertaining speaking style. As a dental business advisor, he is adept at collaborating with dental practices and incorporating Aldrich's expertise to help grow your practice and increase your profitability.

The Aldrich Dental Services Group focuses on helping dentists across the country achieve their personal and professional goals through financial and retirement planning, wealth creation, dental transition strategies, practice enhancement, fee management, cost segregation studies, maximizing tax deductions and other related accounting and consulting services. Their experienced team can help dentists enjoy their dental journey and make their practice work for them.

#### “Fraud in Your Dental Practice”: Learning Objectives

- Understanding Fraud and Why it is Commonplace in Dental Practices
- Common Warning Signs of Fraud in Your Dental Practice
- Simple Steps to Strengthen your Control Environment
- How to make Fraud Conversations with your Team Comfortable
- What to do if you Uncover Fraud in Your Practice



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

**Tuesday, January 30, 2018, 6pm**

## **Live Patient Single Case Presentation by a Study Club Member**

Interdisciplinary treatment planning sessions represent the heart and spirit of the Seattle Study Club. The evening starts off with a Study Club member presenting a challenging, interdisciplinary case with multiple treatment plan options to the entire group. Members are then divided into small groups and rotate through rooms with Study Club Advisors to discuss diagnoses and treatment planning options in a roundtable, collaborative setting.

### **Course Objectives:**

- Help members recognize the value of a collaborative team environment in solving challenging treatment planning issues
- Opportunity to discuss diagnoses and treatment options with peers to uncover multiple case planning solutions.
- Become comfortable diagnosing and treatment planning challenging and complex cases.



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Wednesday, February 7, 2018, 8am

## “The 6 Tools-Putting the Teeth in the Middle of the Smile”

### J. William Robbins, DDS, MA



Dr. Robbins maintains a full-time private practice and is Adjunct Clinical Professor in the Department of Comprehensive Dentistry at the University of Texas Health Science Center at San Antonio Dental School. A graduate from the University of Tennessee Dental School, Dr. Robbins is a widely published author and has lectured across North and South America, Europe, the Middle East, and Africa. His co-authored textbook, *Fundamentals of Operative Dentistry – A Contemporary Approach* (published by Quintessence) is in its 3rd edition. He has won several awards including the Presidential Teaching Award at the University of Texas Health Science Center, 2002 Texas Dentist of the Year Award, and the 2003 Honorary Thaddeus V. Weclaw Fellowship Award from the Academy of General Dentistry. He is a past president of the American Board of General Dentistry, and the President Elect

of the Academy of Operative Dentistry.

#### “The 6 Tools-Putting the Teeth in the Middle of the Smile”: Course Outline:

Providers of anterior restorative dentistry can no longer depend solely on the skills of the dental laboratory technician to insure a beautiful esthetic result. The dentist must be responsible for preparing the “landscape” to accept the beautiful restorations. This may involve lengthening or shortening incisal edge position, and moving the gingival position coronally or incisally.

This lecture will demonstrate how to dynamically transform the periodontium to insure the most esthetic restorative result. Subjects presented will include root coverage, crown lengthening, forced eruption, orthodontic intrusion, and black triangles.

#### Upon completion of the course the participants will be able to:

1. Diagnose the need for both functional and esthetic crown lengthening surgery.
2. Prescribe orthodontic intrusion and extrusion.
3. Discuss indications for connective tissue grafting
4. Describe the 3 main etiologies for black triangles



# San Diego Advanced Study Group ∞ 2017-2018 Speaker Bios and Course Outlines

**Tuesday, March 6, 2018, 6pm**

## **Jurisprudence**

### **Joseph Kutyla, Esq**

Mr. Kutyla's practice includes the defense of health care providers, including physicians and dental professionals. Mr. Kutyla has tried over 100 cases in state and federal courts since 1982. Since 1998, over 70% of his practice is devoted to defending dentist and dental specialists in malpractice litigation. Mr. Kutyla practices before professional licensing Boards. He also represents law enforcement and public employees in civil rights litigation.

#### **Jurisprudence: Course Outline:**

1. Overview of the Dental Practice Act and recent changes
2. Breach of the standard of care and negligence liability
  - a. When is the general dentist held to the standard of a specialist
  - b. Duty to refer to specialist
  - c. Billing code issues
  - d. Fraud and misrepresentation
3. Informed consent
4. Medical Battery
5. Punitive Damages
6. MICRA
7. Trial and jury verdicts
8. Dental Board investigations



# San Diego Advanced Study Group 2017-2018 Speaker Bios and Course Outlines

Tuesday, March 20, 2018, 6pm

## Specialty Showcase with SDASG Endodontist Advisors

### Sheena Howell, DDS



Dr. Howell graduated from the University of Central Florida with a Bachelor of Science degree in Molecular and Microbiology. Upon graduation, Dr. Howell was accepted to Nova Southeastern University College of Dental Medicine in Ft. Lauderdale, Florida, receiving her D.M.D degree in 2010. She furthered her education and training through a General Practice Residency (GPR) at the Veterans Hospital in La Jolla where she was selected by her faculty to serve a second year as chief resident, where she was able to dedicate much of her time to endodontics. Following completion of the two year residency, Dr. Howell was accepted into the University of California at San Francisco, where she completed a three-year endodontic residency. Dr. Howell is proud to be board certified; as a Diplomate of the American Board of Endodontics, she demonstrates excellence and expertise in her specialty.

### Erick Sato, DDS



Dr Erick Sato grew up and attended high school in Walnut, CA and received his BS in General Biology from the University of California, San Diego (UCSD). After volunteering with the UCSD Pre-dental Society, Dr. Sato decided to pursue a career in the dental profession. Dr. Sato attended the Arthur A Dugoni School of Dentistry at the University of the Pacific and received his Doctor of Dental Surgery Degree in 2008. He then attended a 2-year general practice residency at the University of Virginia in Charlottesville, VA, where he gained experience with dental implants, operating room dentistry, and treatment of medically compromised children. He received his Certificate of Endodontics in 2012 from Oregon Health and Science University in Portland, OR. Dr. Sato's research on mineral trioxide aggregate (a type of root canal restorative material) has been published in the Journal of Endodontics.

Rapid changes have occurred in the field of endodontics over the past few years, much like with all dental specialties. Although general dentists may not provide the full scope of endodontic care in their offices, it is important that they be aware of the most advanced methods and materials that are being used by endodontists today. Members will enjoy hearing about the exciting advances in this specialty at this year's Endodontic Showcase!

#### Couse Objectives:

- Identify current trends in endodontic clinical and basic science research
- Cite benefits and limitations of CBCT imaging in endodontic care
- Be familiar with bioceramic materials and their indications
- Learn about recent advances in regenerative endodontics
- Be familiar with newer methods and materials in instrumentation



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Wednesday, April 4, 2018, 8am

**AM Session: “Delivering W.O.W Service; People Will Forget Everything Except How You Made Them Feel!” (Members and staff)**

**PM Session: “Communication Solutions: Attitudes, Breakdowns & Conflict Resolutions” (Members and staff)**

## Judy Kay Mausolf



Judy Kay is a dental practice management coach; speaker and author with expertise in helping others get happier and more successful! She coaches dentists and their teams how to become better leaders, communicate positively and effectively, work together better and deliver service with more passion and focus which ultimately result in growing their practice.

Judy Kay is Past President, National Speakers Association Minnesota Chapter, a member of the National Speakers Association, Academy of Dental Management Consultants, and Director of Sponsoring Partners for the Speaking Consulting Network. She is author of two books; *TA-DAH! Get Happy in 5 Seconds or Less* and *Rise & Shine; An Evolutionary Journey to*

*Get Out of Your Way and On Your Way to Success*, and a contributing author for many dental publications.

### **AM Session, W.O.W Service: Course Outline and Objectives:**

Research shows that practices that build their office environment around serving the patient own and dominate the market. Set yourself apart from your colleagues: differentiate why *you and your office* and not the office down the street!

- Understand W.O.W. Patient Philosophy
- Illuminate a W.O.W. Decision Making Process
- Learn techniques to make W.O.W. Impressions
- Recognize essentials of W.O.W. Branding
- Identify how to spot opportunities that create W.O.W. Touch Points
- Understand W.O.W. Service Standards Concepts

### **PM Session, Communication Solutions: Course Outline and Objectives:**

Learn the skills to communicate positively and effectively with different and even difficult personalities. Discover formats to hold positive, effective and efficient huddles and team meetings. Transform attitudes from toxic to tremendous and create a positive environment where everyone looks forward to coming to the office.

- Learn verbal skills to communicate effectively with difficult and different personalities
- Learn steps to address and resolve conflict
- Establish protocols that eliminate gossip
- Identify behaviors that elevate trust and respect
- Discover methods that turn toxic attitudes to tremendous
- Determine behaviors that inspire a culture of appreciation and celebration
- Learn fundamentals for effective huddles and team meetings



# San Diego Advanced Study Group ☯ 2017-2018 Speaker Bios and Course Outlines

**Tuesday, May 8th, 2018, 6pm**

## **Live Patient Single Case Presentation by a Study Club Member**

Interdisciplinary treatment planning sessions represent the heart and spirit of the Seattle Study Club. The evening starts off with a Study Club member presenting a challenging, interdisciplinary case with multiple treatment plan options to the entire group. Members are then divided into small groups and rotate through rooms with Study Club Advisors to discuss diagnoses and treatment planning options in a roundtable, collaborative setting.

### **Course Objectives:**

- Help members recognize the value of a collaborative team environment in solving challenging treatment planning issues
- Opportunity to discuss diagnoses and treatment options with peers to uncover multiple case planning solutions.
- Become comfortable diagnosing and treatment planning challenging and complex cases.



# San Diego Advanced Study Group ☞ 2017-2018 Speaker Bios and Course Outlines

Friday, June 8th, 2018, 6:30pm

**End of the Year Gala! Celebrate a great year of camaraderie,  
collaboration and learning!**