

DESERT DENTAL EQUIPMENT AND SUPPLY, INC.

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Haley Somers is the daughter of Mike Frances, founder of an Ogden, UT based distributor of dental equipment and supplies. He founded the business in 1977, serving dentists primarily throughout the state of Utah. Haley worked in the business and assumed responsibility for expanding the family business into California, Arizona and Colorado during the mid-1990s.

Gross sales revenue totaled \$25,000,000 in CY 2018. In 2019, Haley decided it was imperative to develop a customer lifecycle based marketing strategy for growing future revenue. In large part, this was being driven by an increasingly competitive market for dental equipment and supply distributors. Customer relationships had been the driver of growing their business to date. Haley had two weeks to develop a recommendation for review with her father, Mike, and her brother Jeff, who was appointed to the position of CEO in 2016.

INTRODUCTION

In January 2019, Haley Somers wanted to develop a customer lifecycle based marketing strategy for their family business, Desert Dental Equipment and Supply, Inc. (DDES). DDES was a distributor of dental equipment and supplies¹ and on average, had grown revenue about 15% per year since 1997. However, “Revenue growth had become more of a challenge in an increasingly competitive environment. We needed a customer lifecycle based marketing strategy that aligned to our customers, no matter where they were in the life cycle²,” Haley commented. She added, “Building relationships in the business enabled DDES to grow for forty-three years, and we never had to really do any marketing.”

Changes in the dental equipment and supply distribution market were characterized by increased price competition and aggressive marketing and sales tactics by distributors; the consolidation of manufacturers and distributors; and the production, distribution and selling of equipment that was of both lower quality and lower price. Private equity had begun buying competitors, as well as some distributors and dental practices. This changed the marketing equation for DDES. Some dental practice accounts were lost as new owners focused on costs, while other competitors focused heavily on marketing. Opportunities to grow revenue

existed with both new and established dental practices. “DDES has always been all about the patient, and the patient will get the best care based upon the equipment. Most of our competitors don’t care about the patient or the doctor, they just care about making the sale,” was how Haley described DDES versus the competition.

“Developing and maintaining customer relationships needs to be at the heart of whatever marketing strategy we decide upon. We need to figure out how to grow revenue by reaching new customers and keeping existing customers.” Haley was passionate about “making her customers happy by providing high-quality equipment and outstanding customer service.”

DDES OPENS ITS DOORS FOR BUSINESS

Haley’s father, Mike Frances started DDES in 1977. Prior to DDES, he worked as a sales representative for Paramount Dental Equipment, Inc. (PDE), a large, national distributor of dental equipment and supplies in the United States. Over the next six years Mike learned the dental equipment and supply business. He always put the customer first. However, he grew frustrated working for a company “that didn’t understand the importance of relationships. They wanted me to just turn a profit. I felt more and more pressure to make the sale, regardless of what was in the best interest of my customer, the dentist.”

Fed-up with the pressure of just making the sale to sell equipment, Mike quit PDE in 1976 and soon afterwards, opened a small, family-owned and operated dental equipment and supply distribution business in Ogden, UT. “We were family owned and operated, founded on the simple principles of professionalism, honesty and integrity,” Mike recalled. “I wanted to sell premier equipment, provide outstanding customer service, and most importantly, develop long-term customer relationships. I wanted every customer to be my friend.” For Mike, the best compliment he said that he could receive was when a dentist would ask, “Mike, what do you recommend?” “I was inspired to do right by my customers and never sell them anything they didn’t need.” Mike added, “It was important to be on a first name basis with our customers. It’s John, and not Dr. Baker. Our customers become our lifelong friends. We do things together with our families. It’s about long-term relationships.”

DDES distributed primarily in the Utah market, and occasionally sold equipment to dentists in other western states. Having grown up in Ogden, Mike had a network of contacts to help him identify customers and build his business. Word-of-mouth quickly spread regarding the superior quality products and outstanding customer service provided by DDES. Many family members joined the business in administrative, sales and service roles. “Like me, they embraced my passion for our customers, who were also our friends”, Mike said. DDES serviced their

customers with highly trained service technicians, a warehouse and excellent service response times.

As the population of the western United States continued to grow in the mid-1990's, dental equipment manufacturers and suppliers wanted Mike to expand DDES distribution into other states including California, Arizona, and Colorado. Mike believed that the time was right. Haley, working closely with her brother Jeff, would drive this expansion.

GROWTH OF THE FAMILY BUSINESS

Haley grew up in Ogden, UT, the seventh largest city in Utah, 40 miles north of Salt Lake City. Ogden was a family community, and most of her relatives lived within 15 minutes of Ogden. Growing up, she spent a lot of time with family and friends. While attending Ogden High School, Haley volunteered with numerous community service organizations such as Big Brothers/Big Sisters, and a local food pantry. Reflecting on her time growing up in Ogden, "I realized how much I enjoyed my family, being with people, making people happy, and building relationships. Just like my dad, Mike."

After graduating high school, Haley attended Northern Arizona University (NAU) in Tempe, AZ, where she graduated with honors, earning a Bachelor of Science in Business Administration degree, with a major in Marketing in 1996. "While I enjoyed being away at school, I did miss my family. It was an easy decision to work for my dad at DDES during the summer. I could live at home, save some money and be with my family."

Mike was thrilled to have her work for DDES during her summer break between each school year. "Haley was a ball of energy, great with the customers, and quickly learned about the products and all. Of course she was family and we loved her, but everyone she met loved her. Definitely a people person."

After graduating from UCSD, Haley went to work full-time at DDES. For two years, she rotated throughout the business, working in sales, customer service and operations. Dental equipment and supply manufacturers were "always bugging me to expand beyond Utah and into the California and the Arizona markets," Mike commented. "I fought it because I wanted to be able to service any new customers 110%. By 1998 Haley had a couple of years of experience under her belt. 1998 was the right time to expand."

That year, Mike asked her to move to southern California to open two offices, one in Los Angeles, and one in Phoenix. Each office would have an attached showroom, warehouse and service center. When she asked me what her title was,

Mike said, “You don’t need a title. That’s a formality. With your passion, drive and spirit, you’ll make it happen.” Off to southern California she went. Haley was thrilled with the opportunity to expand the business.

Mike appointed his son Jeff, CEO in 2016. Like Haley, he grew up in the business. Although Jeff and Haley both shared a passion taking care of their customers, Jeff was a “numbers guy” focused on the bottom line, and in Mike’s opinion, well-suited for running a business in what had become an extremely competitive environment. By 2016, 25% of DDES employees had been employed there at least 10 years.

Many team members had been there over 25 years. “The longevity of service by team members and their knowledge of the business became a key differentiator for DDES,” Jeff said. DDES is the only family-owned dental equipment and supply distributor in the western United States. They have four locations, one in each in Arizona, California, Colorado and Utah. Each location includes a showroom, warehouse and service center, and averages 10,000 square feet. Over \$5M in inventory is maintained at any given time across the four warehouses to support quick service times.

Haley said that “Our philosophy is that we are a premier equipment dealer. We only sell top of the line. We are very loyal and committed to our dentists. We take care of an office from the day it opens until the day the dentist retires. We are not there just for the sale.” DDES provided additional services such as free consulting on new offices which included assistance with design layout, electrical placement, network placement and equipment layout. Gross sales revenue in CY 2018 was \$25M. The busiest selling time of the year was September through December when about 50% of annual revenue was realized. Haley attributed the seasonality to “tax deductions before the end of the calendar year.” California was the largest market at \$17M, followed by Arizona and Colorado with each contributing \$3M, and Utah contributing \$2M.³ DDES distributed over 1,000 products and supplies to its customers.

For CY 2020 their goal was to increase gross sales revenue by 20% to \$30M. Mike commented, “Our revenues make us a smaller sized player, primarily serving four western states. Many distributors are national in scope, and their revenues reflect that.”

THE U.S. DENTAL EQUIPMENT MARKET

The United States dental equipment market was growing⁴. Contributing to this growth was a health conscious population, increased spending on dental treatments, increased levels of investment in research and development, technological

advances and growth in the prevalence of dental diseases. 2018 revenue totaled \$18.2B with a projected CAGR growth rate of 3.1%.⁵

Change was occurring in the industry. “For example,” Haley said, “PDE, the national distributor my dad first worked for was founded in the late 1960s. It was bought in 2014 by a lower-to-mid-market private equity investor, Pacific Gulf Capital in Delaware, and then became the second largest player in the market.” Haley added, “After several follow-on acquisitions, their revenue grew to approximately \$1.8B in 2014.”

In total, there were 10 major dental equipment and supply distributors in the United States, with 71% market share. There were an additional 10 – 15 distributors that held the largest portions of the remaining 29% market share.⁶ (See Exhibit 1.) “None of the competitors were very good at marketing,” Haley said. “Particularly anything to do with social media. None of us did that well,” she added.

EXHIBIT 1

U.S. Dental Equipment and Supply Distributors

(Source: Morgan Stanley Research (2018))

Competitor	Market Share	Estimated Annual Revenue
SH Inc.	32%	\$5.8B
PDE	10%	\$1.8B
Bianco	9%	\$1.6B
Alaway	7%	\$1.3B
Denby Dental	6%	\$1.1B
Parson	3%	\$546M
Buckhold	2%	\$364M
Eastern	1%	\$182M
Georgia Dental	1%	\$182M
All Others	29%	\$5.3B

“The DDES target market included practicing general dentists, who were the primary care dental providers for patients,” Haley said. A general dentist diagnosed, treated and managed a patient’s overall health care needs including gum care, root canals, fillings, crowns, veneers, bridges, and preventative education. All practicing general dentists had earned either a DDS (doctor of dental surgery) or DMD (doctor of dental medicine) degree. There was no difference between the

two degrees or the curriculum requirements that dentists must meet to graduate. Some schools simply awarded the one degree, while others awarded the other.⁷

Generally, three or more years of undergraduate education plus four years of dental school were required to become a general dentist. Additional post-graduate training was required to become a dental specialist. A dental specialist was a dentist who received additional, specialized training after dental school. It was no different than a medical doctor who received additional training to become a radiologist or surgeon. The role of today's dental specialist had extended and evolved to being a gatekeeper of new product information, an advisor on new restorative materials, imaging devices and radiology techniques, an advocate of new technologies to improve consistency and accuracy, and an educator for improved chair side techniques.

Most dentists still worked in private practices, and Haley indicated that most of her customers still had private practices. While private practices could be of varying sizes, the practice is owned by a dentist and that dentist is responsible for the care of his or her patients. Generally, dentists began practicing in their late 20's and many remained active until approximately age 70. Exhibit 2 provides an estimate of the size of the dental equipment and supply market for DDES. The number of general dentist and dentist specialist practices was projected to grow 2.1% annually, in the United States.⁸

EXHIBIT 2

Size of the Dental Equipment and Supply Market for DDES (2018)

(Source: <https://dentagraphics.com/>)

State	# of General Dental Practices	# of Specialty Practices	Total # of Practices
Arizona	2,635	1,588	4,223
California	20,500	10,941	31,441
Colorado	2,271	1,377	3,648
Utah	1,239	680	1,919

Dental schools themselves were also an important target market. Building relationships with dental students, faculty and staff was “something we could put more focus on. They will always have a need for our equipment,” said Haley. There were six dental schools in California, two each in Arizona and Utah, and one in Colorado.⁹

The United States dental equipment and supply market was segmented by products, application and end-user. Product-wise, this included dental radiology equipment,

dental sensors, dental hand pieces, CAD/CAM, dental chairs, dental lasers, and casting machines. Application segmentation included examining the mouth and teeth, cleaning of teeth, cavity removal, and dental fillings. By end-user, the market was divided into hospital, dental clinic, dental laboratory, and other dental care facilities.¹⁰

Competition in the dental equipment and supply industry had intensified in the United States, driven by increased price competition and aggressive marketing by distributors, the consolidation of manufacturers and distributors, and the production and distribution of equipment that was of both lower quality and lower price. While manufacturer approved pricing (MAP) was typical, the entry of lower priced, lower quality products created lower price points in the industry. 0% financing was now available. Aggressive base salary plus variable compensation structures, and other benefits were being used by some competitors to attract the “best” salespeople.

Mike said, “We have some large competitors, and they do have weaknesses. Some sell knockoff equipment that they put their name on. They get higher profits this way, however, the equipment breaks and has to be serviced in China. Cheap equipment. Distributors like this have lost many major manufacturers so they don’t have great quality to sell. We have another national distributor in the United States, investing in all types of marketing, and they buy in bulk. They are now owned by private equity and spending crazy on marketing and salaries. This same distributor has its sales people working out of their homes in most locations. No buildings, no warehouses, no service centers. Many of the experienced sales people have gotten fed up and quit. Lots of new people. The future is uncertain as ownership will likely change hands again. There are other distributors in this same boat.”

Mike and Haley passionately believed DDES to be “the only distributor in the industry doing right by our customers; becoming their friends, getting to know their families, socializing with them, and never ever selling a piece of equipment that wasn’t best for both the dentist and the patient.” As the market became more competitive, “building long-term relationships seemed to become less and less important to our competition”, Haley remarked. “Other distributors failed to understand the importance of the relationship. They ignored the needs of the customer. It was just about turning a profit.” Although she added, “they began to more aggressively market.”

Relationship marketing remained extremely important in this business. Anthony Stefanou DMD, CBI had spent 25 years in the industry, both as a consultant on the marketing side and as a dentist. He summed up the importance of the relationship between the dentist and the distributor this way, “There is still a strong need for those ‘face to face’ meetings with the distributor, to get information and to see how

a product works. This can occur via an in-office demo, use of lunch & learn presentations, and/or a trade show conversation.¹¹ The decision maker at each practice was different. In some practices the dentist would make all the purchasing decisions. In other practices, decisions for supplies and less expensive equipment were delegated to an office manager. Frequency of purchase was based upon the useful life of the equipment which varied by manufacturer, or, technological advances that necessitated the purchase of new equipment.

Dave Anderson, who had worked for the past 30 years with both of the largest distributor of dental products and services in the U.S., as well as for one of the largest dental equipment manufacturers shared this from a dentist's perspective regarding the importance of the relationship, "If you don't have a trusting, mutually beneficial business relationship with a local distributor, work at developing one! It is critical to your success. Seek out a distributor who is knowledgeable about dental supply and equipment products, the clinical and business aspects of dentistry, and who has your best interest in mind. Explain the type of business relationship you're seeking and what you want to accomplish. If you don't get the feeling that they're on the same page with you, move on. With a little thought and effort, you'll find someone who will partner with you and help with your success."¹²

Haley said she was committed to "implementing a marketing strategy based upon the customer lifecycle. We would market and sell to prospective customers differently than we would to long-standing customers. Taking a customer lifecycle approach, we could gear our marketing efforts towards educating and driving awareness about DDES for new customers and new dental practices. For established customers and practices, marketing efforts would be aimed at maintaining the customer relationship and building loyalty to DDES. We need to understand which marketing tactics are appropriate for each stage of the lifecycle."

THE DDES MARKETING CHALLENGE

Haley said "in light of these changes in the U.S. dental equipment market, we are facing the biggest marketing challenge that we've ever had. We can win by understanding the customer lifecycle, building upon our relationships, and doing better to market to both new customers and to existing customers. It's an awareness and a relationship issue." Haley's analogy was that "DDES is the tortoise and our competition, they are the hares. We can be better than them at marketing, but they can never be a family owned and operated business built on relationships like we are. We will win in the long run. Doctors will realize that they get what they pay for. Purchasing lower priced and lower quality equipment will come back to bite them. They eventually realize this. We will always be about premium equipment and care for the patient. Once doctors purchase our products and experience our service, they won't go anywhere else."

A senior marketing and officer at a DDES competitor identified three trends in the market. First, an intensified focus on dental practices wanting convenience. “As dentists become busier and time is increasingly valuable, our customers with convenience.” This included providing extended business hours to assist dentists, upgrading websites, and creating a mobile app.

“Second, dentists wanted a more consumer-like shopping experience. Today’s customers are tech-savvy and accustomed to shopping online, and they want the same optimized experiences at work.”

“Third, dentists are looking for partners who can provide full-service solutions. As owning a dental practice becomes increasingly complex, dentists are looking for suppliers who can also provide equipment service, technical expertise, specialty supplies, and more.” Haley commented, “Our growth strategy must be informed by this demand. This is where relationship marketing could make a huge difference.”

EXHIBIT 3

DDES Current Marketing Initiatives (as of May 2019)

Initiative	Description
Direct Mailer/Brochure	Distribute 10,000 annually, either through U.S. mail or in-person at trade shows, etc.
Email Blasts	Send 4,000 emails annually, primarily to existing customers.
Facebook	DDES Facebook business page has 550 likes, 567 followers, and one five-star rating.
Instagram	730 accounts following DDES; DDES is following 1,148 accounts.
LinkedIn	DDES has 55 followers. DDES profile includes company history, trade show information and employee spotlights.
Trade Shows	Participate in 4 major industry trade shows annually, and an additional 20 smaller local/vendor/manufacturer trade shows.

DDES marketing initiatives and investments had been limited to word-of-mouth, direct mailers, email blasts, trade shows and a less than mediocre attempt at social media. (See Exhibit 3 for a summary of current initiatives.) Oftentimes, these efforts were targeted at existing customers on record. Four major trade shows and an additional 20 manufacturer and vendor sponsored shows provided an opportunity to meet with prospective customers.

With regards to our marketing budget, Haley said “I don’t really keep track of it. It’s not much. I’ve been reading more about business-to-business (B2B) marketing because we need to do it.” In reviewing the literature, she mentioned that “a reasonable budget for B2B marketers was somewhere between 1.0% and 2.0% of gross sales revenue. This seemed right in my gut.” For DDES, this would range between \$250,000 and \$500,000 annually, based upon their most recent annual revenue of \$25,000,000.

Haley also believed social media and online marketing was important in business-to-business marketing, referring to research she read that was completed by Dell Computer. “I was surprised to learn between 60% and 80% of B2B purchase decisions are made through online research before contacting the company. And 57% of buyers follow social media discussions of a company they plan on purchasing from.”¹³

When asked about what type of return she’d like to have on her marketing investment, Haley stated, “whatever we decide to invest, I would expect to have a 4X return. So for example, if \$250,000 is invested in marketing, I expect a return of an incremental \$1,000,000 in revenue, quantifying the return as best as I can.” Haley added, “I read an article where a 2% increase in retention of current customers can reduce marketing expenses by 10%. With an ongoing focus on our existing customers, we should be more efficient with our marketing expenses.”¹⁴

Haley engaged a local Salt Lake City marketing agency in November 2018 to construct a brand new website that launched in May 2019. The agency benchmarked with other B2B websites in this and other health care related industries, incorporating strong standards for visuals, copy, navigation, search engine optimization, rich media, featuring of product, etc. Though optimistic about the incremental revenue potential to be derived from their new website, Haley knew that DDES needed to do more. “A new website was just one more element of the marketing strategy.” The website was final, with only minor enhancements adding to the functionality and user friendliness of the website being considered. The DDES logo and name of the company would remain unchanged because “Mike and I believe we have an extremely high level of recognition of both our name and logo,” Haley said.

In working with the marketing agency to develop a new website, Haley developed a positioning statement in January 2019 to focus their marketing efforts. The positioning statement embodied how DDES products, services and the brand would provide value to their customers in a way that the competitors did not:

“Premium equipment and care for our customer and the patient is what our brand is about. DDES offers the most comprehensive product lines, outstanding service, and peace of mind by ‘simply being the best’. We offer the most personalized customer service and satisfaction promise in the industry.”

Haley was confident that having four showrooms, four warehouses, \$5M in inventory, a customer lifecycle approach to marketing, and outstanding customer service would enable them to deliver on this positioning. Passionate as always about her customers, Haley added “we want to be there when the customers need us, from beginning to end, providing the knowledge and expertise they require.”

THE NAU STUDENT PROJECT

In January 2019, Haley decided she wanted to engage a group of Northern Arizona University (NAU) marketing students to help her to develop a customer lifecycle marketing strategy. “They are young, have fresh ideas and are users of the latest social media and online marketing platforms. I want to hear what they have to say. And, what a nice opportunity to support my alma mater, NAU.” Haley met with a marketing professor at NAU to scope the project and the deliverables. A summary of student suggested customer lifecycle tactics is provided in Exhibit 4 (end of case). Haley also provided students with key customer messaging points to help them understand how DDES was different from the competition. (See Exhibit 5 at the end of the case).

WHAT IS THE RIGHT CUSTOMER LIFECYCLE MARKETING INVESTMENT STRATEGY?

The NAU students presented their analysis and recommendations to Haley in May 2019. She was very pleased with their work. She committed to both Jeff and Mike that she would present a recommendation for a customer lifecycle strategy in two weeks.

EXHIBIT 4

Summary of Student Suggested Customer Lifecycle Tactics

(Source: Marketing Research Students, Northern Arizona University, Tempe, AZ, April 2019)

- Reputation Stacker (www.reputationstacker.com)
- LinkedIn (<https://business.linkedin.com/marketing-solutions/ads>)
- Facebook (<https://www.facebook.com/business/marketing/facebook>)
- Instagram (<https://rossimmonds.com/how-market-instagram/>)¹⁸
- Social Media Platform Management System
- Rewards and Referral Program¹⁹
- YouTube²⁰
- Search Engine Optimization²¹
- Marketing Student Internship Program²²
- Scholarship Program²³
- Roadshow²⁴
- Mobile Showroom²⁵
- Service Guarantee²⁶
- Sales Call Follow-up²⁷
- Virtual Chat Window²⁸
- AnyFlip Catalog²⁹
- Exit-Pop³⁰
- Mobile Application³¹
- Showroom Renovations
- Blogging³²
- Personalizing the Customer Experience³³
- Philanthropic Events³⁴
- Digital Marketing
- Customer Relationship Management (CRM)
- Tradeshows³⁵
- Universities

EXHIBIT 5

Customer Messaging Content

- DDES products are for the dental professional who demands quality products and service.
- DDES offers the most comprehensive product line that is available from one of four warehouses, the peace of mind that comes when you have “simply the best,” and the best and most personalized customer satisfaction promise in the industry.
- Family owned and operated since 1977, DDES provides a comprehensive line of quality dental products that are professionally installed and maintained with a personal touch.
- DDES provides its customers professionally trained field service representatives. These experienced representatives maintain frequent contact with the customers in their states and bring problem solving skills and relevant information to the customers served.
- DDES products and pricing are easily understood, as well as how these products benefit both the patient and the dentist.
- Founded on the simple principles of professionalism, honesty and integrity, DDES measurement of success is retention of its customers, repeat business, and enthusiastic referrals of DDES to other dentists, clinics, and universities for over 40 years.

REFERENCES AND ADDITIONAL READINGS

¹NAICS Code 339114 (Dental Equipment and Supplies Manufacturing). The dental equipment and supply industry represents a modestly sized market and, in terms of sales, is considered to be one of the smaller industries, compared to the other medical supply and equipment industries. It is also an industry of expected growth due to increases in the cost of dental care, baby boomers taking better care of both their teeth and their children's teeth, and technological advances in dental equipment such as advanced root canal procedure machines, less expensive oral cameras, and the Food and Drug Administration's (FDA) approval of Perioglass, a surface-active, bone-grafting material.

Dental equipment and dental supplies are regarded as separate markets, with some companies manufacturing only supplies; some manufacturing only equipment; and others, generally the larger companies (with a diverse mix of medical products), manufacturing both equipment and supplies. These products are then sold to dentists, dental laboratories, and dental colleges through distributors.

Products manufactured by industry participants include dental chairs, dental hand instruments, and drills, which are considered equipment; and plaster, amalgams (alloyed metals used for filling cavities), and cements, which are considered supplies. Other products, more than 25,000 of them, include abrasive points, wheels, and disks; dental cabinets; denture materials; orthodontic appliances; and artificial teeth, which are not made in dental laboratories.

Source: <https://www.referenceforbusiness.com/industries/Analyzing-Controlling-Instruments/Dental-Equipment-Supplies.html>

²Customer lifecycle refers to the various stages a prospective or existing customer progresses through in a company's marketing relationship. The lifecycle typically includes the following stages:

- Awareness - Lead generation for the company's product(s)
- Marketing and Knowledge — Company-generated information for the product as well as a customer's research of ratings and reviews from other sites and customers and comparison against competing products
- Sales Conversion — The customer purchases product from sales funnel
- Customer Experience and Product Support — Customer consumes product and utilizes company's customer support as needed
- Retention — Satisfied customers develop brand loyalty and continue to use product
- Advocacy and/or Repeat Purchase — Satisfied customers share positive customer experience with friends, colleagues and social network community as well as potentially purchase additional products / services from the company

Companies analyze each stage of the customer lifecycle to maximize conversions, revenue, and overall satisfaction for their products. As a result, the customer lifecycle and metrics for each stage play key roles in both customer relationship management (CRM) and customer experience management (CEM) strategies.

³Source: DDES CEO

⁴<https://www.ktvn.com/story/40094465/north-american-dental-equipment-industry-by-sales-demand-market-size-to-grow-at-a-cagr-of-623-till-2023>

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⁶Morgan Stanley Research – Life Science Tools & Diagnostics, May 21, 2018

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³⁴<https://www.offthecusp.com/10-excellent-national-dental-organizations-deserving-of-your-support/>

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