avail
dental
exit
advisory
services

Business Model
$ Service

Small Business
6-20 people

Growth stage
Established

Avail Dental saves several hours <u>every day</u> after working with Puzzle

Services used
✅ Current State Mapping
✅ Future State Mapping

Project: Restructuring Avail Dental's project management processes in monday.com to give their teams full visibility of 50+ projects across their 10 service offerings.

"
We are now so much better organized as a team. The system Puzzle created has saved hours every day so we are able to create a better customer experience for our clients!

Darren Shanahan
Owner & President

98%
Inrease in Account Visibility

Ready to get started?

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About

Avail Dental Advisory Services has a quick client turnaround and a variety of service offerings ranging from practice valuation to business planning. They wanted to ensure their project management process was seamless internally and externally as their client volume increased and their business scaled.

Challenge

Avail Dental needed to click through hundreds of Monday.com boards to see basic client data and had no visibility into high-level progress. Their team had to spend time every morning searching for their personal tasks and resorted to sticky notes for task tracking, removing any opportunity for progress visibility and collaboration.

Avail Dental was aware of its operational bottlenecks, but team members did not have the time to learn all the ins and outs of monday.com's system and then work with each team member to configure it to their specific workflows. That's where Puzzle came in.

150+
Email Automations
Monthly

Solution

Avail Dental walked Puzzle through its ten service offerings and identified the process and requirements for each type. Puzzle built out Monday.com to fit their needs using best practices on data, integrations, automations, and reporting.

Puzzle converted over 100 boards to just 2 boards showing high-level and granular progress for each client's project. With each step and owner clearly defined, automations and integrations became possible as the project reached specific stages throughout its lifecycle. Avail now utilizes an average of 70 administrative automations and 150 email automations monthly.

Puzzle ensured that all team members had real-time visibility into each account's progress and correspondence with external contacts. Team members can also see "who's court" each project is in, what items are pending, and be prepared for when it's back in "their court."

Results

The time saved by automations, integrations, and organized data allows the Avail Dental team to focus on nurturing their current clients and attracting new clients, allowing them to scale the business without additional costs.

The quality and consistency of their work have increased along with visibility and collaboration. Missed tasks, un-answered emails, and vacation delays are no longer a concern as all client communication is tracked and accessible to relevant team members. This increases customer satisfaction and results in more repeat clients.

Avail Dental is better equipped for long-term sustainability as upper management has real-time access to internal and external processes. Employee workload is accessible, which leads to informed decisions on resource planning. Project bottlenecks are clearly identified and can be addressed immediately, ensuring client satisfaction and increasing volume capacity as projects are managed in a more time-efficient manner.

Watch a video testimonial here

Turn your chaos into joy with Puzzle

Puzzle's approach is unique in that it prioritizes understanding each business process inside and out before suggesting solutions. Puzzle specializes in business operations and tech stack optimization, combining two often daunting tasks into one ~6-week process with a designated Customer Success Manager and Solutions Architect.

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Puzzle