

CASE STUDY

PACIFIC DENTAL SERVICES[®] (PDS[®])





TYPE OF COMPANY: PRIVATE
SECTOR: HEALTH AND WELLNESS
EMPLOYEES: APPROXIMATELY 10,000
HEADQUARTERS: IRVINE, CALIFORNIA

LRN collaborates with its partners from a holistic perspective, believing that they should not just protect themselves with ethics and compliance education, but propel themselves with programs that inspire values-based behavior and cultures, provide a shield against misconduct, and drive sustainable performance to fuel long-term growth. LRN’s partnership with PDS shows how they put that belief into action.

“Most organizations just pay lip service to their values; it takes a pretty unique organization to genuinely digest a values-based approach and make it work in an authentic way.”

– MICHAEL WILLIAMSON,
CHIEF COMPLIANCE OFFICER
AND SENIOR DIRECTOR OF
COMPLIANCE AND ETHICS, PDS

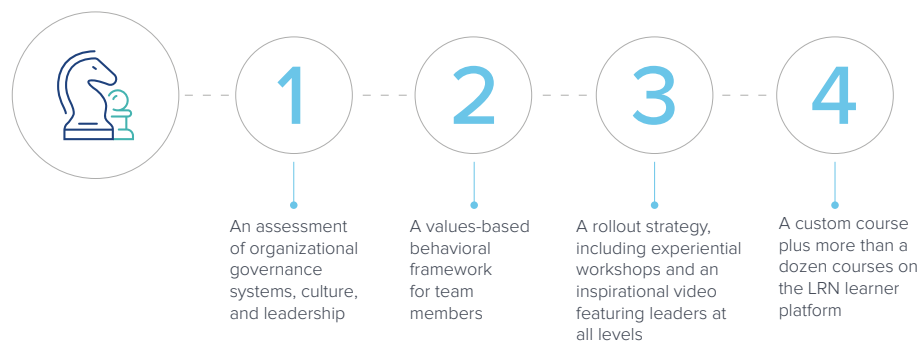
PARTNER INFORMATION:

Pacific Dental Services® (PDS®) is one of the leading dental support organizations in the U.S. They partner with dentists to provide business support services, so the dentists can stay focused on their passion: dentistry and patient care. PDS believes in Clinicians Leading Clinicians in Clinical Excellence® to create Healthier, Happier Patients®. The company’s Perfect Patient Experience® (PPE®) operating model gives patients in PDS-supported offices an extraordinary, differentiated experience, creating Patients for Life™.

BUSINESS CHALLENGE:

PDS was founded in 1994 with strong organizational values, known as the company’s “We Believes” and a vision to be The Greatest Dental Company in America. Increasingly rapid growth and geographic expansion has landed PDS a place on Inc.’s 500|5000 list of America’s fastest-growing private companies for 10 years in a row. Now with almost 650 supported dental offices, PDS continues to grow, adding about 80 supported offices every year. This growth necessitated a formal ethics and compliance program with dedicated resources. PDS knew their ethics and compliance program should be grounded in their We Believes, not simply a set of rules. So it set out to implement a values-based approach to ethics and compliance.

SOLUTION DEPLOYED:



When Michael Williamson took the position of Chief Compliance Officer at PDS in 2014, he was quick to see that PDS, an owner-founded company, had a predisposition and an appetite for a values-based approach to ethics and compliance. He was given a chance to develop a sustainable, values-based program with a view to the long term, and turned to LRN for help. “There’s often pressure to impose upon organizations binary guidance around rules,” he says. “But a more holistic approach is to leverage the soul of those organizations and their values, to orient them to what’s right and what’s wrong. In researching that approach, LRN rose to the top naturally.”

THE ASSESSMENT: ESTABLISHING A BASELINE

First, LRN conducted an assessment of PDS governance systems, culture, and leadership. This diagnosis of the company’s posture as it relates to compliance and ethics was a comprehensive undertaking across all levels of the organization and geographies. It was conducted via one-on-one interviews, focus groups, larger in-person meetings, and a team member survey. “It revealed a ton about our culture, and put into stark contrast the difference between what we thought the impact of our values was and how they really showed up to team members. The data points that form the diagnosis of our culture is invaluable,” says Williamson.

LRN synthesized the data from these various sources and articulated an organizational profile based on behavioral attributes mapped against LRN’s proprietary Governance, Culture, and Leadership Framework. Among other things, the assessment revealed a lack of consistent orientation around PDS’ core values, known as their “We Believes.” Although the We Believes were key differentiators that played a huge role in the recruitment and retention of team members, there was a sense the values were being diluted as the organization expanded in size and geographic reach.

“The conversation around the misalignment of our values and the impact of that misalignment on the perception of trust levels was a crucial one to have with our owner and founder, who wrote our original We Believes to articulate the type of organization he wanted to lead,” Williamson says. “The assessment was thorough and the data was displayed clearly and in the voice of our people. In combination with our founder’s humility and willingness to digest, accept, and address the findings, the impact was enormous. That couldn’t have happened without the LRN process.”

THE BEHAVIORAL FRAMEWORK: ARTICULATING CORE VALUES

Armed with powerful insights from the assessment, the next step was to help PDS align around a shared understanding of the We Believes. In contrast to a conventional code of conduct, which typically is a strict, multi-page narrative of corporate “rules,” PDS wanted a framework for team members that would clarify the We Believes by articulating desired behaviors that bring them to life. The Behavioral Framework provides a practical guide for team members to do the right thing and navigate tough or potentially risky situations. By putting the We Believes at the center of “how we do things around here,” PDS enables team members to transcend the limitations of a rules-based mindset. “It is a genuine reflection and graphic depiction of our organization’s commitment to a values-based approach,” says Williamson.

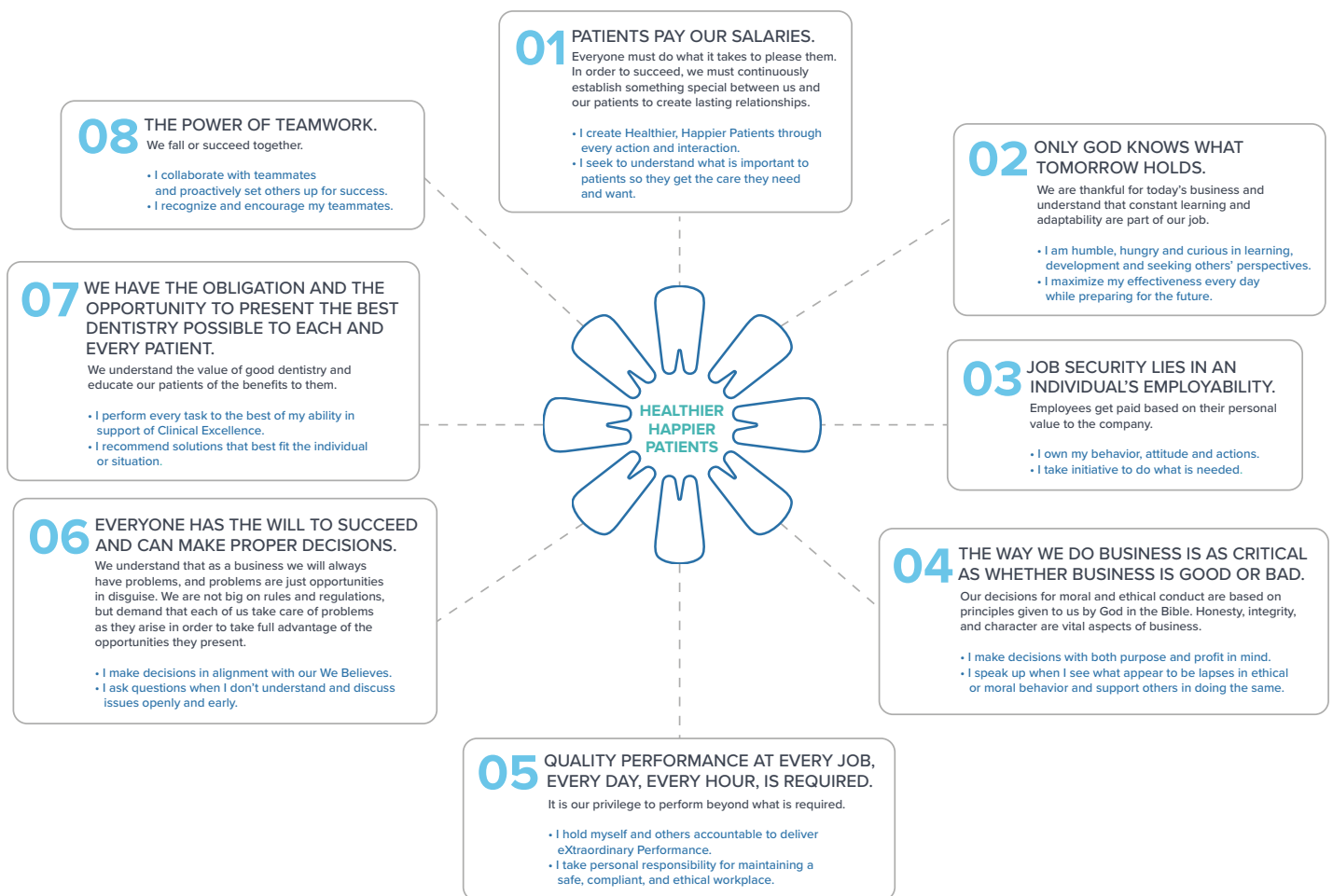
As explained on the company’s web site: “The Framework creates enormous benefits for our company, our team members, and the patients of our supported offices. Our We Believes, and the corresponding “Therefores,” build trust,

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encourage self-governance, and inspire each of us to achieve at the highest level. The We Believes Behavioral Framework is the structure that supports these goals. It articulates the behaviors that will help all team members live the We Believes and connect them to our daily work, enabling a consistent experience across the organization—whether you are a PDS® team member, a clinician, or a patient of a supported office.”

Key to the Framework’s success and relevance was the co-creative process by which it was developed. LRN engaged team members at all levels in articulating the behaviors that bring the We Believes to life, emphasizing those behaviors that could be applicable to ALL team members, regardless of role, location, or scope of influence. The process was iterative, such that team members built off of what had been surfaced by the colleagues that preceded them. Two sessions with the executive team allowed the framework to be refined and finalized. According to Williamson, LRN was able to help PDS understand “our voice, our values, and their resonance. It is an enormous accomplishment to have our people think about and articulate what our values mean to them, and to have that reflected in our Framework. My ability to say to anyone, internally or externally, that the behaviors reflected in that Framework are literally the voice of people throughout the organization, at every level and every geography, is really powerful.”

THE WE BELIEVES BEHAVIORAL FRAMEWORK



EXPERIENTIAL LEARNING: INTERNALIZING THE FRAMEWORK

PDS is in the process of rolling out the We Believes Behavioral Framework to nearly 10,000 team members through a structured meeting process across its 18 regions. LRN designed the program emphasizing a train-the-trainer approach, such that leaders – beginning with the executive team – go through the experience first then cascade it to their teams at a cadence that works for them. “I don’t prescribe how it gets done, as long as it gets done,” Williamson says. “It’s going to take a year to get the whole organization through it.”

Through facilitated discussion, participants reflect on the opportunities they have to demonstrate the We Believes and desired behaviors, as well as when or why it is challenging to do so. This process creates a space for colleagues to support each other in identifying how to realize the opportunities and overcome those obstacles. Further, it enables everyone to internalize what it means to live the We Believes by contextualizing them to each person’s role.

“The most important part,” says Williamson, “is that at the end every participant is asked to make a commitment to furthering the opportunity, or overcoming the obstacle, that they identified. That commitment is recorded and followed up on. We’re investing tremendous time and energy into impacting how people learn the Framework and internalize it for themselves in furtherance of organizational imperatives, imperatives.”

THE VIDEO: MAKING IT HUMAN

LRN also created a video to help introduce and roll out the We Believes Behavioral Framework. It captures executive and senior leaders who have gone through the workshop experience describing what the We Believes mean to them and how they will act upon their commitments. PDS uses this video to introduce the experiential learning workshop to new peer groups. “For me, it’s moving and inspiring. It makes me feel proud to work at PDS, and demonstrates to people at every level that others throughout the organization have done exactly what they’re about to do,” Williamson explains. “Peer groups are engaging in what they just saw their bosses or superiors doing, so it really sets the stage in a powerful way.” PDS has also integrated the video into their new hire onboarding process, providing a valuable reference point on the role of its values in the organization.

PDS’ ONGOING JOURNEY

PDS has made great strides toward its goal of establishing a values-based, sustainable ethics and compliance program. A custom online course on the We Believes Behavioral Framework, developed by LRN, will be rolled out to all team members as an additional learning touchpoint, providing a refresher and reinforcement of the experiential learning workshops. Still, the work necessary to align and embed values throughout everything the organization and its people do never ends. Deep, meaningful change takes time, and LRN is proud to be a partner with PDS on this long-term journey.

So far, Williamson says he is “most pleased with the fact that LRN performs exactly as it represented it would. Their authenticity cannot be overstated. Their guidance, solutions, and partnership truly reflect their spirit, and their ability to flex and accommodate the nuances of a privately held, 24-year-old organization never wavered.”

ABOUT LRN

LRN offers education, tools, and advisory services to help organizations develop values-based cultures and leadership, strengthen ethics and compliance efforts, and inspire principled performance. Founded in 1994, LRN is a global company that has educated more than 20 million employees and has worked with more than 700 companies in 100 countries worldwide.

LRN’s work is grounded in HOW®, a philosophical framework for individual and organizational behavior in a world that is increasingly complex and interdependent.

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