

How Petaluma Dental Group replaced **10 software vendors with Adit**



Meet Petaluma Dental Group

With a 40+ person team and a reputation for blending cutting-edge dentistry with whole-body wellness, Petaluma Dental Group is far from your average practice. Under the leadership of Dr. Yolanda Mangrum, it has become a beacon of innovation, community impact, and sustainability. But behind the scenes, a tangle of disjointed software tools was holding the practice back. Dr. Mangrum knew they needed a smarter, more integrated solution that aligned with their mission and worked seamlessly with Open Dental.

Challenges

- Managing over 10 disconnected software vendors
- Outdated phone systems and unreliable communication tools like Weave
- Confusing, incomplete analytics from Dental Intel and Square Practice
- High software spending without clear ROI
- Staff bogged down by multiple logins and inboxes

Results

6 hours

Saved weekly in administrative tasks

15%

Decrease in call load for the front desk team

45%

Patients now rebook via email or text

65%

Increase in online reviews

\$1,200+

Per month in software cost savings

Adit is like a software Swiss Army knife. Everything we need, in one place. It's streamlined, works with Open Dental, and saves us thousands.



Dr. Yolanda Mangrum DDS, MAGD
Owner, Petaluma Dental Group

Life before Adit

Before Adit, Petaluma Dental Group's operations were fractured across multiple vendors. They used BirdEye for reviews, RevenueWell for emails, Yappi for forms, Wix for website management, Sophos for phones, and several others for analytics, marketing, and scheduling. These platforms didn't connect, which created operational silos and prevented Dr. Mangrum from seeing the whole picture.

It was alphabet soup. I was paying 10 different companies, and none of them worked together. It drained my energy and left my team overwhelmed.

Adit to the rescue

Dr. Mangrum turned to Adit for a unified approach. Adit integrated seamlessly with Open Dental and replaced every major vendor she had been using. Adit provided a centralized solution that finally made sense, with connected tools for digital forms, online scheduling, review management, softphones, practice analytics, and more.

I don't want someone coming in here and talking to me about one tooth. I want a conversation about their whole wellness plan. Adit finally gave us a system that works like we do.

The transformation

01 Consolidated Technology Stack

Adit replaced over 10 different tools (and software bills) with its all-in-one platform and finally eliminated the need for multiple logins, vendors, and inboxes to manage. The result? A simpler workflow and \$1,200+ in monthly software savings.

Theoretically speaking, if we were to calculate the amount of hours Adit has saved our team in terms of salaries and wages, we're saving about \$20K per year

02 Operational Efficiency and Time Savings

By consolidating tools and automating communication and intake processes, Petaluma Dental Group saved an estimated 6 hours per week. Adit's softphones, synced with Open Dental, reduced call handling by 15 percent and gave leadership better visibility across patient touchpoints.

03 Patient Engagement and Growth

Adit's Pozative module drove a 65 percent increase in online reviews, boosting the practice's digital visibility. Nearly half of patients now rebook via email or text, thanks to automated reminders and an improved patient journey, all handled through a single platform.

Now, my team can focus on patients instead of juggling disconnected tools. Adit gives us one source of truth and a real partner who listens and improves alongside us.