



How Peak Dental Services Transformed a Patchwork AP Process into a Connected Procure to Pay System

Peak Dental Services is one of the fastest-growing dental support organizations (DSOs) in the United States. Founded in 2008, the company supports more than 70 dental practices across Colorado and Texas with centralized non-clinical services, including IT, insurance processing, procurement, and facilities management. By streamlining operational infrastructure at scale, Peak Dental empowers dental practices to focus on what matters most: delivering outstanding patient experiences.

Executive Summary

Before partnering with Ottimate, Peak Dental Services had automated some parts of its accounts payable process, including electronic invoice imaging and approval workflows. However, invoice processing and invoice payment were managed separately, which meant the team had to cobble together the process from start to finish. This fragmented approach led to extra manual work, limited visibility, and reduced control over spend validation and reporting.

Today, Ottimate serves as Peak Dental's unified procure-to-pay platform for operating expenses. The finance team has visibility into every step of the invoice lifecycle, enabling more accurate spend validation and timely financial reporting. With a unified system in place, the AP team has improved internal collaboration, regained control over the entire process, and maintained a strong reputation as a trusted partner throughout the organization.

The Challenge

Peak Dental Services is no stranger to accounts payable automation. The finance team had already implemented electronic invoice imaging and approval workflows to support their growing organization.

"Before we had Ottimate, our AP process was somewhat automated," explained Emily Phillips, SVP Finance and Controller for Peak Dental. "So we weren't starting from scratch.

However, the team was using an automation platform that didn't align with their business dynamics. Over time, processes were adapted to accommodate the system's limitations.

"The habits the team developed with a platform that didn't work for us were a little bit hard to break," she said. "So we had to reinvent the wheel a little bit."

Furthermore, invoice processing and vendor payment were managed separately, requiring the team to piece together multiple systems. This fragmented approach created extra work, limited end-to-end visibility, and made it difficult to maintain control over spend validation and reporting.

“It’s always so hard when you try to patchwork quilt a process together from beginning to end,” Phillips added.

As the company continued to grow, it became clear this approach couldn’t scale. The team needed a solution that would support growth and bring visibility and control to the entire procure-to-pay process.

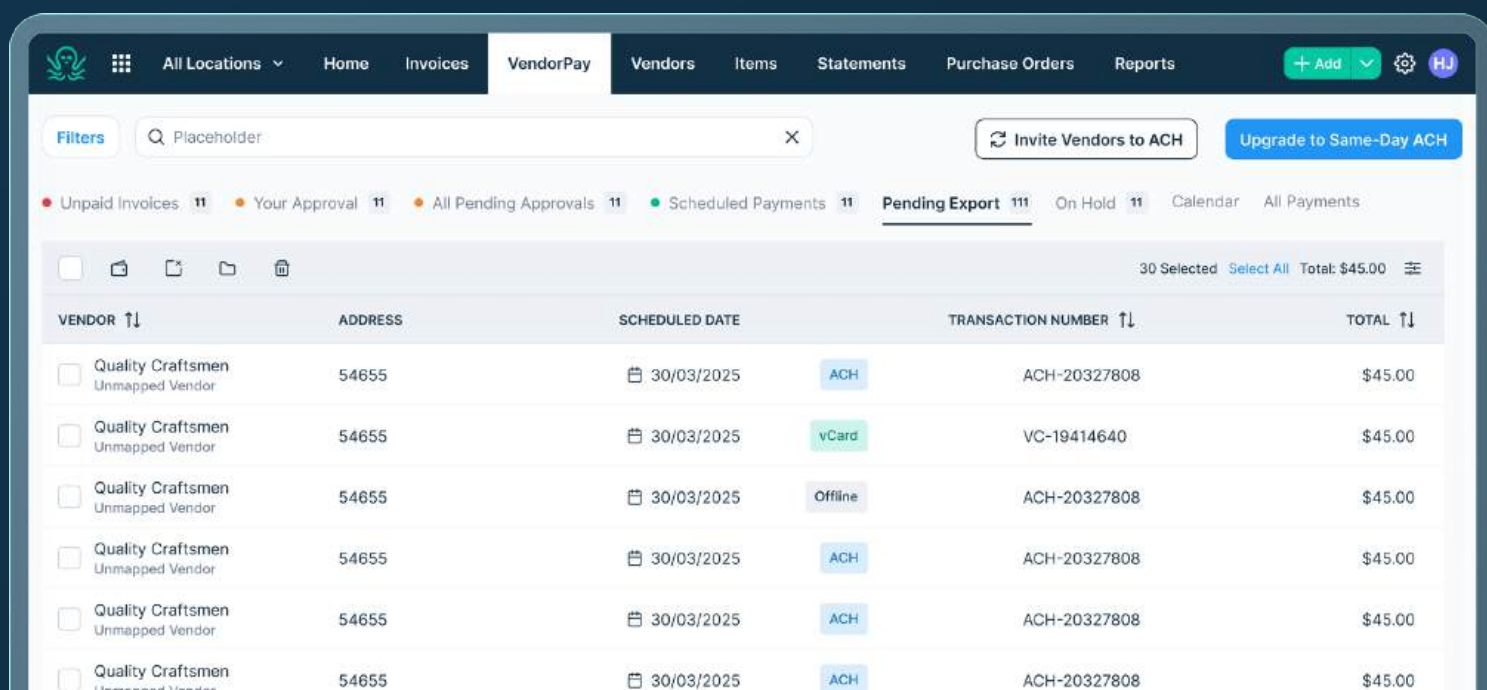
The Solution

Phillips conducted extensive due diligence to find a platform better aligned to the organization’s needs. After a thorough review, Peak Dental Services chose Ottimate.

While functionality and efficiency were important, trust and transparency were ultimately what drove the decision. Ottimate demonstrated a deep understanding of DSOs’ needs and a commitment to deliver on what was discussed during the sales process.

“I was provided with a customer reference of someone who had recently implemented the platform in the same vertical,” explained Phillips. “That was huge. Transparency in all things is really important to me, but especially professionally with a service provider. You need to know that what you’re buying is what you’re getting.”

Today, Ottimate serves as Peak Dental’s centralized procure-to-pay platform for operating expenses. Invoices are entered into the system and flow seamlessly into payment through Ottimate’s VendorPay feature. Instead of managing invoice processing and payment separately, the team now has a unified view of the whole process.



The screenshot displays the Ottimate VendorPay interface. At the top, there is a navigation bar with tabs for 'All Locations', 'Home', 'Invoices', 'VendorPay', 'Vendors', 'Items', 'Statements', 'Purchase Orders', and 'Reports'. A search bar with a placeholder 'Placeholder' and a search icon is visible. To the right of the search bar are buttons for 'Invite Vendors to ACH' and 'Upgrade to Same-Day ACH'. Below the navigation bar, there is a summary row with various status indicators: 'Unpaid Invoices: 11', 'Your Approval: 11', 'All Pending Approvals: 11', 'Scheduled Payments: 11', 'Pending Export: 111', 'On Hold: 11', 'Calendar', and 'All Payments'. The main content area shows a table of invoices. The table has columns for 'VENDOR', 'ADDRESS', 'SCHEDULED DATE', 'TRANSACTION NUMBER', and 'TOTAL'. The vendor listed is 'Quality Craftsmen Unmapped Vendor' with address '54655'. The scheduled date for all entries is '30/03/2025'. The transaction numbers are 'ACH-20327808' and 'VC-19414640'. The total amount for each entry is '\$45.00'. There are also icons for '30 Selected', 'Select All', and 'Total: \$45.00'.

VENDOR	ADDRESS	SCHEDULED DATE	TRANSACTION NUMBER	TOTAL
Quality Craftsmen Unmapped Vendor	54655	30/03/2025	ACH-20327808	\$45.00
Quality Craftsmen Unmapped Vendor	54655	30/03/2025	VC-19414640	\$45.00
Quality Craftsmen Unmapped Vendor	54655	30/03/2025	ACH-20327808	\$45.00
Quality Craftsmen Unmapped Vendor	54655	30/03/2025	ACH-20327808	\$45.00
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“The fact that Ottimate is our procure-to-pay platform for all of our operating expenses, other than those that are purchase order-based, means that it’s playing an integral part in us validating the spend and reporting it timely and accurately,” said Phillips.

The team uses VendorPay whenever possible, enabling electronic payments and allowing vendors to choose their preferred payment method. This eliminates the need for a patchwork payment approach and provides full visibility into every stage of the process.

“Ottimate’s role within our overall accounting lifecycle is huge,” said Phillips.

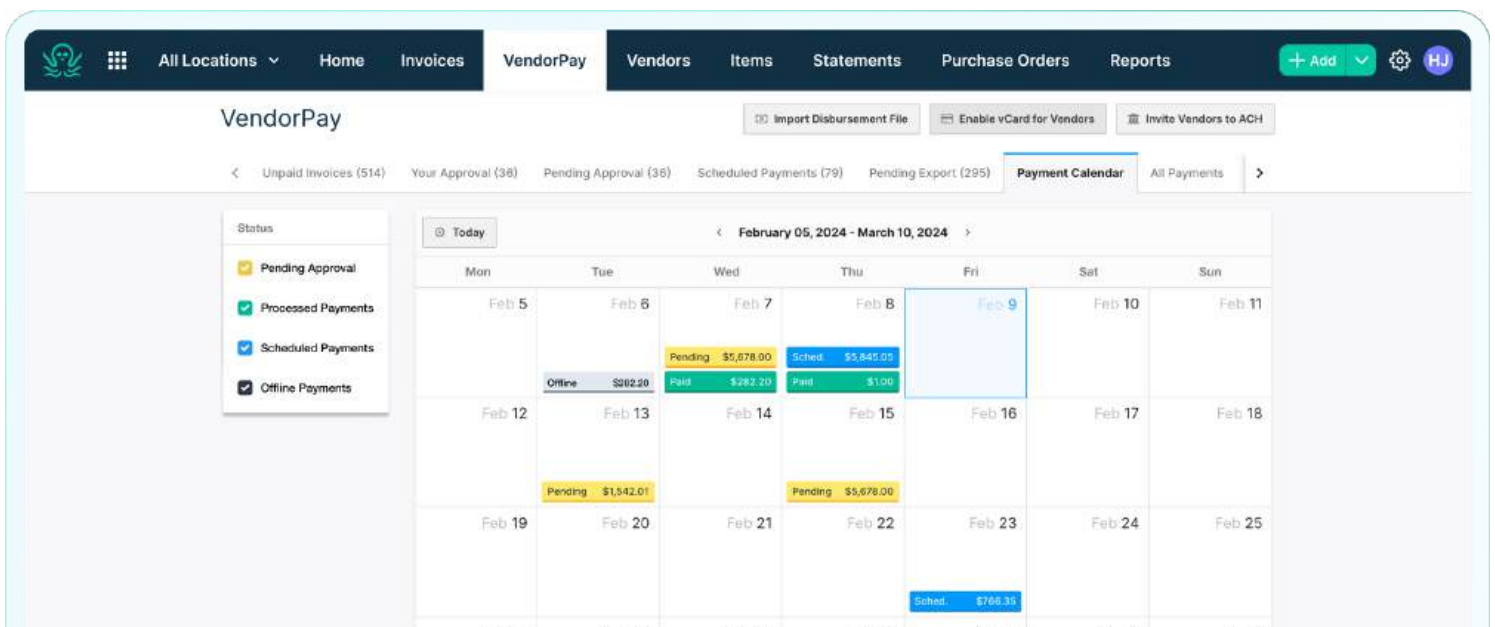
The Results

Since implementing Ottimate, Peak Dental’s accounts payable process is no longer pieced together across multiple systems. Instead, they have a unified procure-to-pay workflow. This has been extremely impactful for a lean team supporting more than 70 dental practices.

According to Phillips, the team is now functioning much more cohesively. “We’re able to communicate both inside and outside of the platform, share responsibilities, divide and conquer, and prioritize daily tasks,” she said.

Instead of spending time jumping between invoice intake and vendor payment, the team now operates within a single system that provides visibility into every stage of the process. This has strengthened spend validation, improved reporting accuracy, and bolstered leadership’s confidence in financial data flowing to the P and L.

“It’s been a game changer in terms of allowing us to really feel like we have control over that whole process,” said Phillips.



Building a structured, transparent workflow has also helped the AP team maintain a positive reputation throughout the organization and foster stronger cross-functional relationships.

“The truth of the matter is the accountants aren’t always the favorite people in the room,” explained Phillips. [Partnering with Ottimate] has really allowed us to establish a good rapport, connect with, collaborate with, and communicate with all of our teams in operations.”

For Peak Dental Services, choosing Ottimate wasn’t just about adding another tool to the tech stack. They’ve also gained a true partner dedicated to the company’s ongoing success.

“My journey with Ottimate has been great,” concluded Phillips. “From due diligence through implementation and beyond, the team has continued to support us and take our feedback to heart. It’s been a good road and a good relationship.”



3000+

Number of Invoices Processed per Month

Founded: 2008

Headquarters: Colorado Springs, CO

Industry: Dental support organization

Supports:

70+ practices across Colorado and Texas