

KOERT TAKKUNEN, MBA

SALES & OPERATIONS LEADERSHIP EXECUTIVE | REGIONAL / DIVISIONAL PRESIDENT, VP, OR DIRECTOR — DENTAL & HEALTHCARE

Sales Leadership, Development & Coaching | Team Development | Revenue & EBITDA Responsibility & Growth

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PROFESSIONAL SUMMARY

Dental industry sales and operations executive who has led at every level of the business — distribution, manufacturing, sales leadership, and DSO equity ownership as one of Pacific Dental Services' original seven Regional Partners — culminating in the Western Division Presidency of Clear Choice Dental Implant Centers, a successful acquisition by The Aspen Group, and a successful personal equity transaction as a partner at Pacific Dental Services. I build people-forward, culture-first teams held to a standard that's tender-hearted on people and tough on results, driving sustained year-over-year growth through disciplined talent development and succession planning. I'm intentionally targeting Regional or Divisional President, Vice President, or Director of Sales roles directing sales leaders and their teams — a deliberate move toward where I create the most value.

AREAS OF EXPERTISE

Sales Leadership & Coaching • Regional Team Development & Talent Calibration • Consultative Sales • Case Acceptance • Operations • Revenue & EBITDA Growth • P&L Management • Same-Store & DeNovo Growth • Site Selection & Real Estate Acquisition • Clinical Leader Development & Succession Planning • Performance Culture & Accountability • KPI Scorecards & Data-Driven Decision-Making • Crisis & Change Leadership (COVID-19 Recovery) • Executive & Leadership Coaching

PROFESSIONAL EXPERIENCE

Founder & Principal, Invicta Dental & Healthcare Consulting — Remote 2021 – Present

Advisory and consulting practice guiding DSOs, healthcare organizations, private equity sponsors, and practice owners on strategy, organizational alignment, and execution — organized around Koert's 4-Pillar Framework of Purpose, People, Process, and Performance.

- ▶ Consult with clients on strategy, organizational alignment, and execution — translating vision, mission, values, and operating behaviors into the operating discipline and KPIs that drive sustained revenue, EBITDA growth, and enterprise value.
- ▶ Deliver executive coaching for individual leaders and cohorts of critical leaders within client organizations, building the leadership bench needed to sustain growth.
- ▶ Built a leadership development reputation in dental and healthcare strong enough to win business beyond the industry — including a signature multi-session executive coaching engagement for Wetzel's Pretzels, a national snack franchise, credited with directly advancing individual leadership skills and goals and proving that healthcare-honed leadership principles transfer and win across industries.

Fractional Chief Strategy Officer, KIME Sports Performance Physical Therapy — El Dorado Hills, CA 2021 – Present

Regional multi-location sports performance physical therapy platform delivering customized rehabilitation, athletic training, and performance testing through an integrative physical therapy gym model.

- ▶ Facilitated the design of a shared vision and strategic growth strategy that increased annual revenue by \$3.6M, achieving 26.5% CAGR.
- ▶ Designed and executed KPI-driven growth strategies that lifted profitability 68%, patient visits 66%, and revenue per patient 11% while maintaining operational excellence.
- ▶ Delivered executive coaching to the CEO, CFO, and emerging leaders, resulting in multiple promotions to senior leadership roles and strengthening the organization's long-term growth trajectory.
- ▶ Positioned KIME on a two-year path to surpass \$10M in annual revenue, driven by same-store growth and De Novo expansion across California and into new states.

Leadership & Learning Coach, The Academy at District Church — El Dorado Hills, CA Aug 2025 – Jun 2026

A deliberate, mission-driven pause in consulting to partner with the Academy's founder/CEO in co-authoring and delivering a full academic year of project- and experiential-based leadership curriculum for upper-classmen.

- ▶ Scaled back Invicta's consulting engagements — a conscious financial sacrifice — to collaborate with the Academy's founder and CEO in co-authoring a project- and experiential-based leadership curriculum grounded in The Academy's 10 Mindsets (including personal ownership, critical thinking, resilience, and work ethic), deliberately developing students' leadership and critical thinking skills alongside real-world project-based and experiential execution.
- ▶ Guided a cohort of 9 upper-classmen in conceiving, building, and pitching CALA, an AI-bot customer-experience business for small and medium-sized trades businesses — increasing call responsiveness, scheduling, appointment confirmation, and promotional outreach — to local investors and the broader community, securing full-ride scholarship offers worth over \$1M to Austin Christian University for all nine students, creating an immediate launch pathway for the six graduating seniors in the cohort.

President, West Division, Clear Choice Dental Implant Centers — Chicago, IL 2020 – 2021

Led a \$320M+ division within a 78-center, 30-state national platform providing full-arch dental implant solutions; direct reports included a VP of Sales and a COO. Each center served a broad regional patient base driven by a national television campaign with a direct call to action.

- ▶ Delivered record revenue (\$277M → \$320M) and EBITDA (\$37M → \$63M) growth and 150% of total bonus opportunity in 2021 through a people-first, accountability-driven culture, capped by a successful equity exit when The Aspen Group (TAG) acquired Clear Choice Dental Implant Centers.
- ▶ Built and led a 100+ person consultative sales organization through a direct-report VP of Sales, removing the financial and psychological barriers patients faced in accepting full-arch implant treatment (average case value \$60K+) — driving a 25% improvement in case acceptance.
- ▶ Partnered with a direct-report COO to build a digital workflow connecting prosthodontists, oral surgeons, and on-site labs — centered on product quality and the patient, doctor, and employee experience — that held regional and center-level leaders accountable to input/throughput/output benchmarks, cutting days-to-final-delivery by 30% and required appointments by 20%.
- ▶ Drove efficiency gains — fewer process steps, fewer appointments, and lower material and labor costs — that helped the division surpass profitability forecasts while outperforming industry benchmarks on delivery, quality, and experience.

- ▶ Led the division through COVID-19 via decisive change management — re-anchoring clinical and business teams in core cultural values and operating behaviors, rebuilding clinical-team and patient trust, and expanding patient financing flexibility to remove financial barriers to accepting ideal treatment — achieving 92% revenue recovery vs. 2019 (industry average: 50%) and expanding 3 centers while competitors downsized.
- ▶ Built a talent-development and succession-planning process for both business and clinical leaders — partnering with prosthodontist and oral surgeon clinical leaders to assess, develop, and promote center-level clinical leadership — reducing consultative sales team turnover from 43% to 25% and strengthening the bench needed to support continued national expansion.

President & Regional Partner, Pacific Northwest, Pacific Dental Services (PDS) — Irvine, CA 2011 – 2018

President, Operating Partner, and Minority Owner across 77 multispecialty dental offices within a 700+ office national platform (Inc. 500 Top List); 14 direct reports spanning sales and operations.

- ▶ Built and coached the region's sales and operational leadership team, driving same-store and DeNovo growth from 16 to 77 specialty integrated GP offices including 10 stand-alone pediatric and orthodontic offices; Drove revenue from \$19M to \$150M (17.8% CAGR).
- ▶ Led doctor-owner candidate selection — partnering with a panel of clinical leaders for vetting and endorsement, while formal employment sat with partner-doctor ownership — then built a sequential leadership development program (individualized coaching plus peer-based group cohorts) that grew EBITDA from \$6M to \$24M (18.1% CAGR) and owner-doctor profit distributions from \$1.4M to \$7.4M (22.1% CAGR), advancing multiple doctor-owners into equity partners and center/regional leaders.
- ▶ Owned the full DeNovo site-to-open lifecycle — demographic and real estate analysis, site negotiation, design/build-out, and clinical and business leader hiring — across Northern California and the greater Pacific Northwest.
- ▶ Designed and led a hands-on implant-adoption initiative (live surgical and prosthetic training) that grew the number of general dentists placing implants from 57 to 450 and increased implant case growth from 20% to 30% year-over-year.
- ▶ Transformed the region from a profit-first to a patient-first culture, driving the company's highest Yelp/Google review scores and building a referral engine that strengthened both patient acquisition and employee recruiting/retention.
- ▶ Completed a successful personal equity transaction, consistent with the terms of the partnership agreement, on the strength of the enterprise value built during tenure — revenue growth from \$19M to \$150M and EBITDA growth from \$6M to \$24M.

US Central Area Sales Manager, Nobel Biocare — Denver, CO 2009 – 2011

\$4.2B global manufacturer of dental implants and CAD/CAM prosthetics (2,500+ employees). Led the \$12M P&L digital CAD/CAM and CT-guided surgical business.

- ▶ Coached a team of 9 senior level surgical specialists to #1 in total sales quota, sales growth, and new-technology adoption in North America, propelling 67% of the team into the North America top 10.
- ▶ Grew the market 26% to \$15.1M, ranking #1 in North America, while developing 4 of 6 direct reports into the North America top 10 out of 31 specialists.

Regional Sales Manager, Nobel Biocare — Chicago, IL 2005 – 2009

Accountable for \$18.5M P&L, the company's third-largest domestic dental implant business.

- ▶ Rebuilt the region from bottom-performing to #1 in North America in 5 years (\$8M → \$18.5M) by coaching and developing 8 top-performing sales reps; earned President's Club 4 of 5 years.
- ▶ Selected by the President of North America as 1 of 3 regional managers for a 12-month Bain Consulting customer-segmentation engagement that led to new market growth.

Territory Sales Manager, Orange & San Diego Counties, Nobel Biocare — Yorba Linda, CA 2002 – 2004

- ▶ Grew a bottom-ranked territory 20–43% annually by building an interdisciplinary clinical/sales team approach to treatment planning and case acceptance, earning the President's Award for #1 Sales Representative nationwide and Outstanding Sales Achievement Awards (2003, 2004) across the US, Canada, and Mexico.

Early Career

Strategic Sourcing Manager, Capital Equipment & Consumables, Conexant Systems, Inc. • Business Consultant, Alteer Corporation • Cardiology/Neuroscience Territory Sales Manager, Bristol-Myers Squibb • Territory Sales Representative, Patterson Dental Company

AWARDS & RECOGNITION

President's Circle & Region of the Year Runner-Up, Pacific Dental Services • President's Award & Outstanding Sales Achievement, Region of the Year (1x), Top Sales Rep North America, Nobel Biocare • CEO's First Award & Conexant Award for Performance, Conexant Systems, Inc. • Pinnacle Award, Top 5% Sales Growth Nationally, Bristol-Myers Squibb • Million Dollar Sales Club National Award & Rookie of the Year, Patterson Dental Company

EDUCATION & CERTIFICATIONS

Master of Business Administration (MBA), Marketing & Finance — Paul Merage School of Business, University of California, Irvine

Bachelor of Science (BS), Business & Economics — University of Wisconsin, Madison

Graduate Certificate — Center for Higher Ambition Leadership, Boston, MA

PRIOR BOARD & ADVISORY ROLES

Board Director, Carecru (AI-driven SaaS platform for dental patient engagement) • Board Director, Folsom's Hope • Board Director, Dentistry for Children