

CONVERT MORE PATIENTS ONTO PLAN

The top tips

Practiceplan
The business of dentistry

Part of the WESLEYAN Group

Preparing for the day ahead

In-house plan promotion is a team effort. The most important thing to remember is that everyone in the practice has to believe that the membership plan is the best solution for the patient.

You can offer a dental membership plan to your patients, but your approach to communicating the benefits and signing patients up has to be consistent in order to grow. Everyone can prepare and play their part in the following ways:

- **Dentists to the dental team** - Each morning, highlight the patients they would like to invite onto the plan from their day list.
- **Reception** - Prepare an information pack and covering letter for each of these patients, including any relevant forms to sign them up seamlessly if they go ahead and join. Remember, this is a default practice, so make sure the patient believes it too.
- **In surgery dentist** - Explain to the patient why they would like to invite them to join the plan and the health benefits of doing this.
- **Reception follow on** - Explain the benefits that would help them, i.e. discount on treatment and access to the Worldwide Dental Emergency Assistance Scheme. Ask the patient if they have any questions and invite them to sign up today to ensure immediate cover.

Keep the message simple throughout the patient journey, i.e. as a practice you reward your regular and loyal patients by giving generous discounts and benefits. Remind the patients that it is a membership plan designed to benefit the patients and give rewards like saving money.

Remember – membership plan benefits include:

- Savings on your routine dental care
- Discounts on your dental treatments
- Eligibility to request assistance should you have a dental trauma or need to access a dentist out of hours, both in the UK and worldwide
- Priority appointments
- Guaranteed regular visits with your chosen dentist.

Patients, especially when they are new to a practice, sometimes do not want to commit to joining your membership plan. This can be for many reasons but it is often because they want to check you out first and ensure they are happy with the dentist and the practice before signing up to a regular Direct Debit.

The mistake most practices make is that they never go back and approach these patients at a later date to offer them the option to join, so make sure you set up a follow-up process.

Top tips for recruiting patients to your dental membership plan

- **Make sure every member of staff knows about how your membership plan works and the benefits to the patient**, and is comfortable talking about it.
- **Don't use dental jargon**, talk in terms that are easy for the patient to understand.
- **Don't be tempted to do the 'hard sell'** - sometimes patients take a little while to come to a decision.
- **Make the membership plan part of the practice's culture**, which means it is the natural choice for patients to consider, not something that is tagged on the end of conversations.
- **Make sure you have plenty of plan membership leaflets at hand** and visible within the practice and use promotional literature to communicate the benefits.
- **Work hard at developing a friendly and helpful culture within the practice**, this is what patients are buying into when they become members.
- **Don't talk to patients about what is included, talk about the benefits to them.**

Marketing your membership plan

If you do not promote what you have to offer, patients do not know and therefore do not ask, so it is important that you have the tools to show what is available in the practice.

As an absolute minimum you should have:

- Plan information leaflets
- Promotional posters or slide show in waiting room
- Plan versus pay-as-you-go fee comparison guides
- Treatment fee guides showing savings for members.

Put together your process as a team. Make sure that you don't drop the ball, if you have had a conversation in surgery, then make sure the front desk team knows what you have recommended so they can then pick this back up with the patient at the desk.

Be prepared so that if a patient does decide to join, you have everything you need at hand to get them signed up on plan. There is nothing worse than scrambling around looking for different pieces of literature. Have packs of literature made up in advance, remember you want this patient to believe that this is normal practice for all of your patients, so it should feel like it.

Be prepared to answer any questions or concerns that the patient may have.

If the patient wants more time to think about options, make sure you have an action to follow this up with a call later. If you promise the patient you are going to contact them or send literature, etc, make sure you do it, don't pass the buck to your colleagues!

Set some realistic targets and monitor your progress – keep the team involved and aware of how things are going.


New patient enquiries


Recognise what you are trying to achieve from an initial enquiry. This is not the time to try and sell prospective patients a plan but a good time to mention it. The goal is to get them to book a new patient appointment. You can then talk to them face-to-face about options available at the practice once they have experienced you as a practice.


- **Following the initial conversation with the dentist, the optimum time to discuss joining a plan with a new patient is when they come to the desk with their treatment plan.** Present them with the membership plan option first and wait for a response before offering them pay-as-you-go as an alternative.
- **Whatever they decide - even if they join - they will pay for the treatments they have had that day.** If they do decide to join and fill in the Agreement form, they will be entitled to the discount on any treatments they are coming back for. By sticking to this, the patient will always be paying in advance for their prevention appointments not in arrears.
- **The money is taken out of the patient's bank account on the 8th day of every month.** This payment covers the patient for that calendar month, i.e. 1st to 31st. The payment on the bank statement will say Practice Plan.
- **They will receive a letter when they have joined to confirm they have been set up and directed to the patient Instapage to access the Scheme documents and Privacy Policy.** They will be entitled to their first routine exam and hygiene appointment following the initial 6-month period; however, their discounts, Scheme and additional benefits are effective on their start date.
- **You will have an Agreement Calendar that tells you by which date we need to receive the Agreement in order for us to collect the following month, this is usually around 25th of the month.** If the patient signs up after this date, we cannot guarantee that we will be able to process the agreement in time to collect on the 8th of the following month, so two payments would be collected the month after.

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