

DENTAL PLAN SOLUTIONS FOR GROUPS



PatientPlanDirect

Your patients, your plan

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Who is Patient Plan Direct?

Established in 2009, Patient Plan Direct (PPD) has positioned itself as one of the market's leading, innovative, and most cost-effective plan providers. **We've taken the time to understand dental groups' challenges** and have developed our solution and support to meet their every need.

With hundreds of practices throughout the UK choosing PPD, we are delighted to be working with an increasing number of dental groups who have recognised the benefits of our unique approach to running, developing and growing successful and profitable dental plans.



While we are well-established, trusted, and resilient, we pride ourselves on delivering a personalised service that is agile and flexible to meet the demands of dental groups.

The groups we work with benefit from our dedicated Business Development team, who provide the necessary tools, advice,

training, and support to ensure plan-related objectives are achieved or exceeded.

Alongside the Business Development team, our Client Services team is on hand to help with all aspects of plan management - a team that truly cares about delivering a first-class service.

We have developed our market-leading plan management portal with dental groups in mind. The online portal provides access to all the information, reports and functionality relating to your plan patients and collections in real time.

Our technology can integrate with various third-party applications and practice management software using an Application Programming Interface (API).

We are a Facilities Management provider under the Bacs scheme and a Small Payments Institute regulated by the FCA - so you can be assured your plan funds are processed and managed in the securest of environments by a team of qualified experts.

Positively impacting your bottom line

PPD's clear, tiered fee structure is significantly more cost-effective than other major plan providers. This results in huge cost savings; either when you grow your plan base with PPD, or switch your existing plan patients to us from another provider - positively impacting your bottom line.

While we acknowledge that other providers may offer volume-based discounts on their service fees, our fee structure remains consistently more cost-effective.



Even small fee differentials can result in considerable cost savings

Total plan patients across group	Admin fee per patient per month (incl. VAT and Global Dental A&E Scheme)
Up to 1,499	£1.36
1,500 - 2,999	£1.21
3,000 - 6,999	£1.06
7,000 - 14,999	£0.99

Reduced administration fees are available for groups with 15,000+ plan patients - contact us to know more.

Total plan patients across group	Admin fee differential vs. existing provider/s	Approximate group savings over three years
5,000	£0.50	£90,000
	£0.90	£162,800
	£1.30	£234,600
20,000	£0.30	£216,000
	£0.60	£432,800
	£0.90	£648,600
50,000	£0.30	£540,000
	£0.50	£1,080,800
	£0.70	£1,260,600

How we can meet your needs

The groups we work with recognise the advantages of leveraging economies of scale and achieving operational efficiency through consolidating their plan offering and management with PPD.



Growing private revenue

If certain practices within your group or specific clinicians are looking to grow private revenue alongside NHS care or convert to offer private care exclusively, our expert team can help guide and support all stakeholders.

The appetite for developing private care options has never been as prevalent and important in improving:

- Access for patients.
- Diversification of revenue streams.
- Clinician recruitment.



Re-energise practice teams' focus on your plan

Our dedicated Business Development team will work alongside you to ensure your practice teams have the appropriate knowledge, tools and motivation to nurture plan growth in line with your organisational objectives.



Maximising profitability

PPD is widely recognised as the most innovative and cost-effective major plan provider, delivering service and support comparable, if not superior, to other, more expensive providers. Our service fees are often two to three times less than other providers, which can result in huge cost savings for the groups we work with – six or seven-figure savings in some instances.

You have buying power and can leverage economies of scale as a group. Our simple and transparent tiered fee structure accommodates and rewards scale as your total patient base grows group-wide.



Operational efficiency

Working with a single plan provider enhances operational efficiency, making it easier to manage and reconcile plan income and related data through one source.

Our powerful online management portal provides all the insight, reports, and data you require at practice and group level, available 24/7 and supported by our Client Services team.

Unlike other providers, we don't hold collected funds for any longer than what's dictated by the bank's clearing system – allowing for faster payment and improved cash flow.



Simple Switch existing plan patients

Switching existing plan patients from other providers to PPD is now easier than ever thanks to Simple Switch - a process that bulk transfers your plan patients with zero hassle. No action is required from your team or patients. It's a quick, effective way for your practice to achieve transformational cost savings.



Focused service wrap

Our service wrap focuses on supporting your group to meet your plan-related objectives. We don't offer support or advice in areas unrelated to your plans. Such 'extras' from other plan providers are all wrapped up in their administration fees. We keep our fees lower by providing a highly focused, innovative and technology-driven solution.



Dedicated support

We provide dedicated support to our dental group clients, meeting the needs and engagement required in liaising with stakeholders at head office, regional and practice level:

- Head office – advising and agreeing on overall plan-related strategy and providing group-wide reporting.
- Regional support – applying tactics to achieve group strategy and monitoring progress through appropriate Management Information and reporting.
- Practice support – training and support to achieve plan-related goals and maximise plan growth/retention.



Promoting your own brand

Our solution for managing plans across your group can be fully white-labelled. In contrast to other providers claiming to offer a 'practice-branded' solution but promoting their brand at certain touch points with patients, the PPD solution exclusively promotes your brand.



Flexibility – your patients, your plan

We don't dictate the type of plans you offer patients. We can provide advice, but ultimately, the pricing, benefits and features of your payment plans are determined by you. Whether you want to offer full capitation, maintenance, hygiene only, children's plans or any other type of plan, the choice is yours.



Global Dental A & E Scheme for patients

Plan patients have access to a supplementary Global Dental A & E Scheme, which gives them extra peace of mind if they ever need dental treatment following an accident or have a dental emergency:

- Emergency treatment away from home.
- Emergency treatment out of hours.
- Treatment following an accident.
- Mouth cancer fixed benefit.
- Assistance with the costs of hospitalisation when wholly or partly under the care of



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Powerful technology

The executive team at PPD has vast experience in the fintech space, enabling us to develop a powerful, resilient online management portal which is our own IP.

We have developed our portal with groups in mind and continually review and develop our technology in line with client feedback.

The portal user experience is highly intuitive and fully supported by our Client Services team, who can provide training and assist with queries alongside a library of tutorial videos.

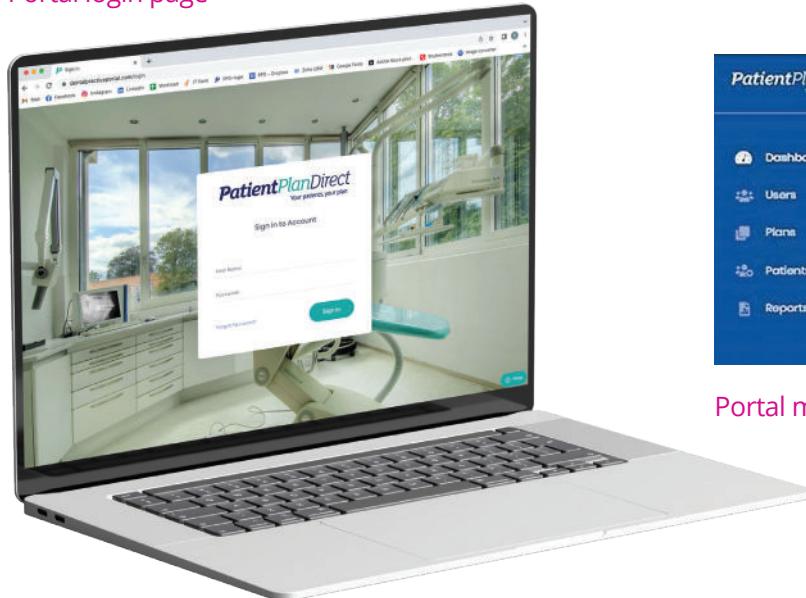
The portal is entirely paperless, significantly boosting operational efficiency while providing a sustainable solution that aligns with environmental goals.

Functionality includes but is not limited to:

- An extensive suite of reports at both practice and group level that can be run across any date range, i.e. not just monthly schedules. This includes:
 - New joiners.
 - Plan revenue and payment history.
 - Cancellations including reasons why.
 - Plan level and/or status changes.

- Dashboards to help visualise key plan-related metrics.
- Multi-level user options to control access to financial data.
- Paperless or paper-based patient sign-up options.
- Online sign-up links to add to your website and email marketing, enabling patients to join in the practice or online.
- Real-time modulus checks at sign-up to ensure bank details are correct, avoiding failed direct debit collections from the outset.
- Continued investment in developing our technology to meet the needs of practices and groups' emerging requirements.
- Options for API integration with third-party platforms and other practice management software.

Portal login page



Portal menu



View of dashboard to show visual element to plan stats / growth



Ability to see whole estate / group portfolio through one login

Consolidating with Simple Switch

Switching existing plan patients from other providers to a plan solution via PPD has never been easier, thanks to the new **Simple Switch** process.

Historically, a switch of patients from one plan provider to another was managed by writing to patients and asking them to complete a new direct debit mandate. Simple Switch utilises the bulk change process – an established and proven banking facility offered by the direct debit scheme provider, Bacs.



With Simple Switch, the transfer of direct debits between providers is managed in the background. The process eliminates any administrative burden for a practice or group, removes uncertainty about patient retention, and requires no call to action from patients.

It's a hassle-free way to consolidate your plan management, giving you complete confidence to make the change and benefit from transformational cost savings.

Since the introduction of the Simple Switch process, the average retention rate practices have experienced when switching to PPD has been 99.1%, which is in line with the normal attrition experienced with plan membership month-to-month.

After completing the Simple Switch process, many practices refocus on expanding their plan offering, leveraging our support to surpass the total number of plan patients they had before switching.

Switching to PPD can enable your group to focus, save, re-energise and grow!

The Simple Switch

6-step process



Sit back and relax, while we manage the transfer of patient direct debits in the background, completely hassle-free. When collections switch, there is no break in any cover for patients or income to your practice.

Expert support and huge cost savings

Enjoy huge cost savings thanks to our low admin fees, alongside our expert support, ensuring you achieve plan success.

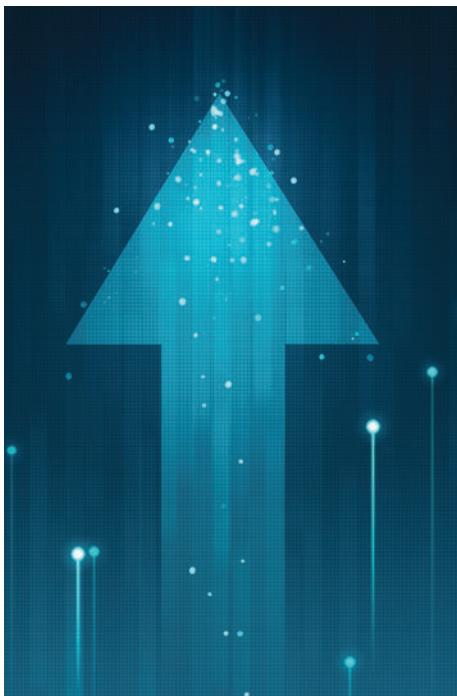
Growing private revenue

If certain practices within your group (or specific clinicians) want to grow private revenue alongside NHS dentistry or convert to offer private care exclusively, our expert team can guide and support all stakeholders.

The appetite for developing private care options has never been as prevalent and important. Hitting UDA targets and making NHS dentistry commercially viable is arguably tougher than ever before, and of course, there is a ceiling to earnings under an NHS contract. As such, growing private care options diversifies revenue and creates room for growth.

With so many dentists leaving the NHS system and patient access becoming a greater issue by the day, options to provide patients with an affordable alternative are key. The offering of a private dental plan is a proven vehicle for achieving this objective. Finally, with so many dentists disillusioned by and lacking appetite to deliver NHS care under the current system, providing options to deliver private care can help attract clinician resources from a limited talent pool.

Our Business Development team can assist with all aspects of introducing and growing private dental plans, either alongside or as a replacement for NHS care.



Our 5-step NHS to private dentistry process



1. Viability analysis

We will start by assessing your practice dynamics, reviewing and considering specific indicators and areas that we know are key to making a successful transition.

This assessment can include a clinician's length of service at the practice and patient loyalty, fee-paying to exemption ratio, and your vision.



2. In-depth financial analysis

We will perform a thorough financial analysis to assess conversion success - advising on an ideal plan structure, price point and plan uptake target to replace

the current NHS income (alongside private treatment income). We will also recommend the optimal surgery time required to provide care for private patients.



3. Team buy-in, engagement and training

Once you have decided to proceed, our Business Development team will be on hand to ensure your practice teams are fully trained and engaged with

the transition process and plan launch. Dental plans may be new territory for many team members, so it's essential that everyone is comfortable and fully on board.



4. Patient communication

We will manage the patient communication process, providing promotional materials and managing mailings to patients - clearly explaining the change and

their options. It is paramount that these communications are clear and uniquely designed to speak directly to the practice's patient base positively and confidently.



5. Practice and ongoing support

In the early stages of the transition, we offer in-practice support via our team, who are on hand to deal with any questions or queries, no matter how big or small. Our team

will help with all aspects related to your plans, including marketing materials, team training, pricing reviews and more.



Group testimonials



We had been with our previous dental plan provider for many years. Over the years the service and support we received from them had faded, things were not how they once were. This led us to question value for money. After recognising their innovative approach to supporting practices in growing and retaining a plan membership base, we decided to switch to PPD. Support for our staff was a prime consideration. We were also very pleased to learn that we could make considerable savings in plan administration across our practices due to their low admin fee proposition.

We transferred our large plan patient base via the Simple Switch process across multiple sites without any hassle to our patients. Our teams were supported throughout and since switching our plan numbers have increased. The PPD team have an enormous amount of experience to share, which has particularly helped us with successful NHS to private conversions in some of our practices. I would urge you to have a chat with their team – 15 minutes of your time could save you thousands!



DR ROB GLENNING

DIRECTOR | UNITY DENTAL GROUP



Considering PPD's admin fees are significantly less than other providers we have worked with, the support and responsiveness from their team has been far from 'cheap' or 'no frills'. We have been super impressed with the expertise and knowledge the PPD team has provided in supporting our plan goals.

In utilising the Simple Switch process, we have been able to consolidate our plan patients from other providers to make huge cost savings, thanks to a transparent tiered fee structure that rewards scale and positively impacts our bottom line.

We have also looked to support certain clinicians and/or practices to move more towards practicing privately or converting completely. The forecasting analysis, training in engaging our practice teams, communication support, and general advice PPD has provided has resulted in some very successful NHS transitions.

PPD is an invaluable asset that has transformed how we manage dental plans, bringing efficiency, savings, and satisfaction to our practice



CHERYL REYNOLDS

HEAD OF OPERATIONS | REAL GOOD DENTAL



We previously worked with various plan providers across our group of practices. We wanted to consolidate this approach and work with just one provider, and since switching to PPD, we have positively impacted our costs and bottom line.

The service and support from PPD is first-class. We have the flexibility to determine our plans and push our brand, but we also have the reassurance of being able to lean on expert advice, training and resources from PPD to help us reach our plan-related objectives.

The user-friendly online portal makes managing our plans super simple at the click of a button and dovetails with our ethos to adopt paperless processes where possible. The range of reports and functionality allows us to access all the MI we require at practice and group levels. The PPD solution for dental groups just makes sense.



LOUISE HATTON

HEAD OF OPERATIONS STRATEGY | DENTAL BEAUTY PARTNERS

We welcome the opportunity to meet with you to understand your current dental plan arrangements, future objectives and explore how we can help you achieve operational efficiency, plan base growth, re-energise your teams, and significantly benefit your bottom line.



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Simple
Switch



NHS to
Private



Plan
Launch