

# DENTAL PLAN SOLUTIONS FOR GROUPS



**Patient***Plan***Direct**

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 an accredited Facilities Management provider under the Bacs scheme and 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.

We have a proven track record of providing in-person consultancy and training that positively impacts practice teams, central hubs and/or clinicians to drive plan growth and strengthen patient retention.



## 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 a consultant who specialises in dental or maxillofacial surgery.



**PatientPlanDirect**  
Your patients, your plan

# Powerful technology

The executive and engineering teams at PPD has vast experience in the fintech space, enabling us to develop a powerful 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.

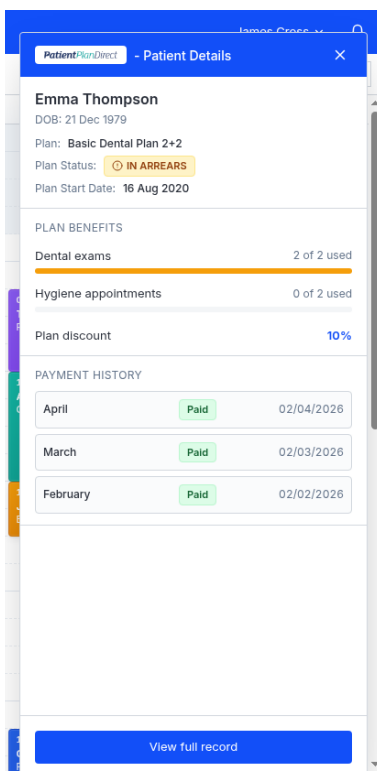
The portal user experience is highly intuitive and fully supported by our Client Services team, who can provide training and assist with queries alongside a library of tutorial videos.

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.
- iGrow - AI tool creating autonomous marketing campaigns that run, learn, and optimise to promote plan sign ups.
- Dentally integration – Widget to view patient plan information and track usage within Dentally.

The PPD Portal has been designed to make performance monitoring and data-driven decision-making straightforward and accessible, providing clear visibility of both individual practice performance and portfolio-wide dental plan metrics from one central location.



The Dentally widget, connects to our portal via API, enables groups to streamline operations and gain real-time visibility of plan patient information.



The PPD dashboard provides a centralised view of dental plan growth and key practice metrics.



With a single login, users can easily access and analyse dental plan performance per practice or across the entire group.

# 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, part of Pay UK.



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.

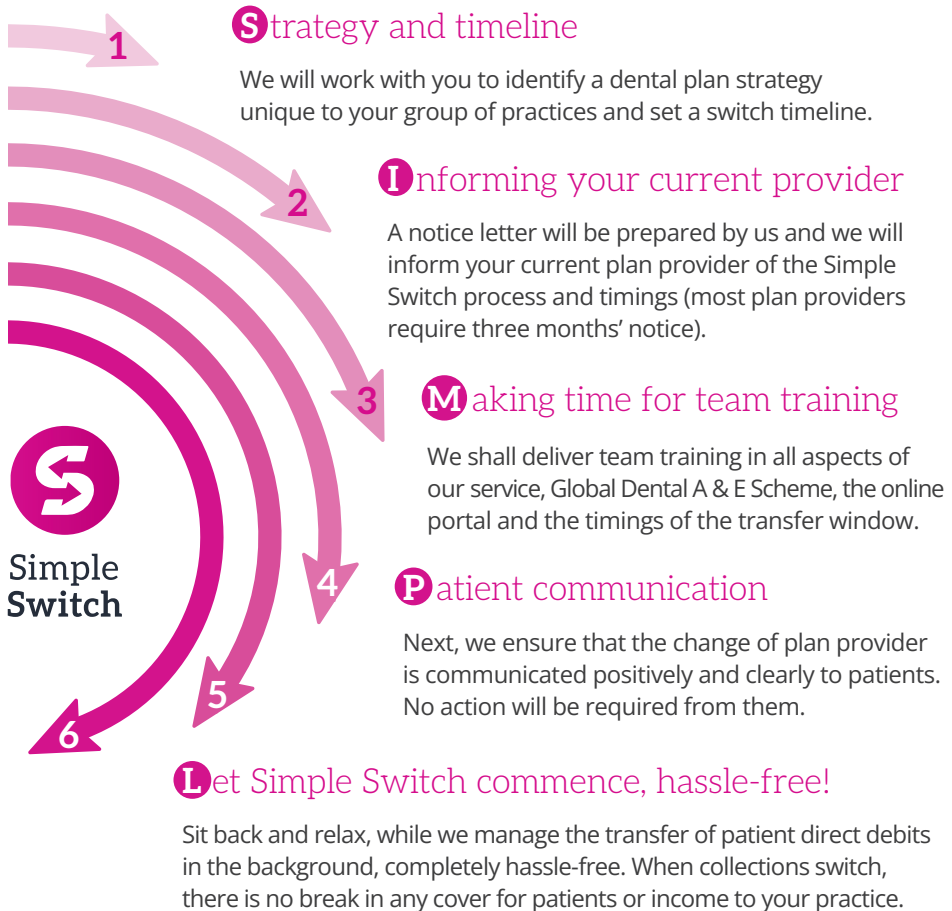
Since the introduction of the Simple Switch process, the average retention rate practices have experienced when switching to PPD has been 99.1%, which is in line with the normal attrition experienced with plan membership month-to-month.

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



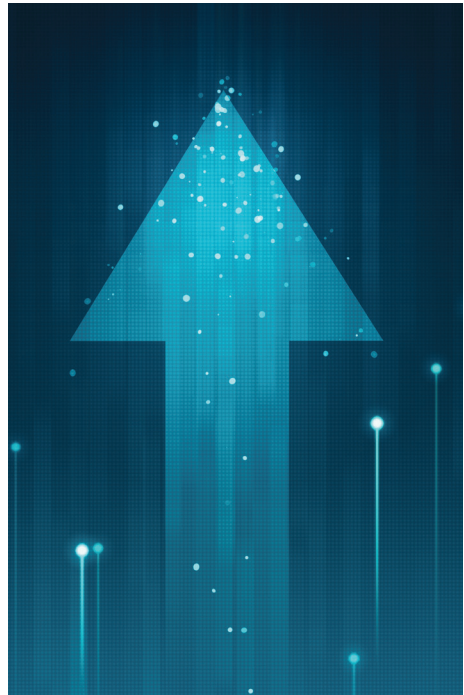
# Growing private revenue

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



Our purpose at Today's Dental is to improve lives and create smiles, and it is important to us that every aspect of our business delivers on this. PPD have been an amazing partner to ensure we continue to work in the way that is true to us. Our expanding group of practices, now over 35 across the UK, have been able to tap into PPD's experience, knowledge and marketing materials. We're incredibly grateful that PPD has consistently delivered personable and tailored support for our practices' as individually branded pillars of the community.

When our practices come on board, it is essential that their patients receive no disruption and continue to receive exceptional care. Changing plan provider to PPD as part of this process has been efficient and effective, with tens of thousands of patients switching without interruption and even growing our signing up numbers as part of the transition. PPD have gone above and beyond in their support and have provided expert consultancy with training, communication plans and fulfilment making them a strategic partner that provides exceptional value.

**LISA MCKINNON**

CHIEF OPERATING OFFICER | TODAY'S DENTAL



After years with our previous provider, declining service led us to question whether we were receiving value for money. As we explored alternative providers, both staff support and financial savings were key considerations.

PPD's innovative approach to growing and retaining plan membership, together with lower admin fees, convinced us to switch. The transition was seamless, our plan numbers have since grown, and PPD's expertise has been invaluable, particularly in supporting NHS conversions. A conversation with their team could save your group thousands.

**DR ROB GLENNING**

DIRECTOR | UNITY DENTAL GROUP



Despite fees significantly lower than other providers, PPD's support is anything but 'no frills'. The expertise and responsiveness of their team has been outstanding. Through the Simple Switch process, we consolidated

plan patients from multiple providers, with a transparent tiered fee structure delivering huge cost savings at scale. PPD's forecasting, training, and communications support has also driven some very successful NHS to private transitions. Truly an invaluable asset — transforming how we manage dental plans and bringing efficiency, savings, and satisfaction to our practice.

**TOM CORCORAN**

COMMERCIAL DIRECTOR | REAL GOOD DENTAL



After consolidating from multiple providers to PPD, we've positively impacted costs and our bottom line. The service is first-class — we have the flexibility to shape our own plans and brand, while leaning on PPD's expert

advice, training, and resources to meet our objectives. The user-friendly portal makes plan management effortless, supports our paperless ethos, and delivers all the MI we need at both practice and group level. The PPD solution for dental groups just makes sense.

**LOUISE HATTON**

DIRECTOR OF OPERATIONS | DENTAL BEAUTY PARTNERS

We welcome the opportunity to discuss your current dental plan arrangements, future goals, and how we can help drive efficiency, grow your plan base, energise your team, and improve profitability.



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NHS to  
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