

New Plan Launch Road Map



Plan Launch

At Patient Plan Direct (PPD), we know what it takes to implement dental plans seamlessly and successfully. With decades of plan experience, our expert team has the knowledge, resources, and technology to ensure your dental plans launch smoothly.

Read on to discover our New Plan Launch road map for comprehensive support in dental plan set-up, administration, promotion, and more.

ON-BOARDING PROCESS

- **Setting Your Plan Fees.**

Getting your plan fee right from the start is not only an essential part of setting up but also a strategic move for your practice's profitability. We meticulously analyse your pay-as-you-go fees, conduct comprehensive market research, and structure what your plan may look like. Our aim is to ensure maximum value for plan patients while keeping your practice's financial health in check.

- **Promotional and Communication Guidance.**

You will have access to a Client Resource Hub – an online platform offering a range of tools to help you promote your plan to new patients. We will provide promotional leaflets and posters, but on the platform, you'll find social media assets and content suggestions, example wording to use on your practice website, and much more.

- **Training and Development.**

We offer two in-depth training sessions before your plan's launch and unlimited ongoing refresher sessions. Our goal is to ensure that your entire team is fully invested in the plan from the outset. Your Practice Success Team member will deliver the 'Dental Plan' training, and our Client Services team will complete the 'Online Portal' training.

- **Patient Journey.**

During our training session with the team, we will explore how your current patient journey works. We discuss how best to incorporate plan promotion and each team member's role and responsibility in encouraging plan sign-ups.

Plan-patient growth projections will initially be estimated based on the number of new patients registering with the practice. We will review and amend these projections at our quarterly pathway meetings (read more about these below) as an integral part of your overall business plan.

At each pathway meeting, we will ask:

- How many new patients have joined the practice?
- How many have been one-off emergency patients?
- How many have booked another six-monthly exam?

INTRODUCTIONS TO OUR PARTNERS

While we adopt a low and transparent fee structure by providing a highly focused plan solution (where you don't pay for extra auxiliary services or support you may not require), we are constantly looking to bolster our offering to help our clients run as highly effective practices as they possibly can.

At PPD, and as part of Agilio Software, we're fortunate to have some of the strongest connections across the dental industry. This allows us to support our clients not only in launching dental plans but also in building the most effective and successful dental practice possible.

If you'd like advice in other areas of your practice, get in touch, and we'll be happy to introduce you to our trusted network of specialists and partners, many of whom have successfully supported a number of our clients.

YOUR PLAN LAUNCH PATHWAY MEETINGS

- **1 Month – Early Intervention Session.**

This session will allow us to review the first few weeks since launching the plan/s. We will discuss whether the plan fees work well and adjust if necessary. At this point, you will have discussed the plan with patients and received some feedback.

Now is the time for a team confidence check-in to ensure that everyone is still on board and believes in the dental plan/s. Your team is instrumental to your dental plan success.

- **3 Months – Quarterly Progress Assessment.**

We will review the growth of the plan numbers in the first three months. This review will give an overview of the practice's current plan patient numbers and the opportunity to re-assess plan-patient projections and targets.

- **6 Months – Mid-year Momentum Check.**

It is always good to check in mid-year to review the first six months of launching your dental plan/s. We will discuss any challenges or barriers the practice/team has faced and work on the best solutions to moving forward.

Looking at the practice's net growth over the first six months will give a good insight into the growth pattern of plan uptake. It is the right time to realign the team's focus on your memberships – this may require a refresher training session or tools to help with plan promotion.

- **12 Months – 1-Year 'Planniversary'.**

You have completed your first year of offering dental plan/s to your patients! This milestone should show that you have a strong foundation for creating more sustainable revenue for your practice. We hold a full annual review to discuss plan growth, cancellations, trends, current plan fees, etc.



MEET OUR PRACTICE SUCCESS TEAM MEMBERS AT PATIENT PLAN DIRECT

Our dedicated Practice Success Team specialises in supporting New Plan Launches, helping them build and nurture a robust plan patient base. They take a proactive, hands-on approach, ensuring regular progress check-ins are seamlessly scheduled, and any potential challenges are flagged early. You won't need to chase updates—our Practice Success Team will closely track your progress and provide tailored solutions to any plan-related issues you might face.

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Feel free to connect with our Practice Success Team; they will then be in touch to arrange a discovery call.