



MEMBERSHIP PLAN

OPEN
ENROLLMENT
SEASON

317-593-4145
Janelle@PlanForward.io

www.planforward.io

Existing Patient comes into practice for their
scheduled appointment.

Individual Member Front Office:

"Welcome, Mrs. Jones! Great to see you again. Hope you are doing well. "

"I'm doing great, how about you?"

"I'm great too! Thank you. You know, we love having you as part of our practice and as we are approaching Open Enrollment season, we wanted to let you know about our in-house membership plan. Many of our patients are finding our plans are very competitive with traditional insurance plans. Would you like to hear more about it?"

"Yes, that would be great."

Go over the plan brochure with them and explain the benefits of the reduced rates and savings for their preventative care along with the additional discount on restorative care. Complete the insurance vs. membership plan comparison sheet with them to help show the patient the value.

"Yes, that sounds great. How do I become a member?" Let them know they will be able to sign up for the plan once their insurance year is complete or have them use your enrollment link to pre-enroll so they will be in the system.

or

"Ok, thanks for the information. I'll think about it. or No thanks, not today"

Ok, no problem. Please take our brochure so you have the information and let me or any of our team know if you have any questions.



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Existing Family comes into practice for their scheduled appointment:

Family Front Office:

"Welcome, Jones Family! Great to see you all again. Hope you are all doing well. "

"We're doing great, how about you?"

"I'm great too! Thank you. You know, we love having you and your family as part of our practice and we understand the cost of care for a family can be significant. This is one of the many reasons we decided to implement a membership plan in our practice for our loyal patients like you. As we are approaching Open Enrollment season, we wanted to let you know about our in-house membership plan. Many of our patients are finding our plans are very competitive with traditional insurance plans. Would you like to hear more about it?"
or

"Yes, that would be great."

Go over the plan brochure with them and explain the benefits of the reduced rates and savings for their preventative care along with the additional discount on restorative care. Complete the insurance vs. membership plan comparison sheet with them to help show the patient the value.

"Yes, that sounds great. How do I become a

member?" Let them know they will be able to sign up for the plan once their insurance year is complete or have them use your enrollment link to pre-enroll so they will be in the system.

or

"Ok, thanks for the information. I'll think about it or No, thanks, not today"

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New Patient - First Visit

Welcome, Mrs. Jones! We are so happy to have you as a new patient. How did you hear about us?

Let Patient answer & reply accordingly

Example: Patient states they were referred by another patient/family.

"That's great! We love the Smith family and truly appreciate referrals from our patients.

We are so glad your here! Since you are new to our practice, you may not have heard about our in-house membership plan. I understand you currently have dental insurance but as we approach Open Enrollment season, we would love to share the details with you so you can make the best decision for your dental benefits. May I share those details with you?"

"Yes, that would be great."

Go over the plan brochure with them and explain the benefits of the reduced rates and savings for their preventative care along with the additional discount on restorative care. Complete the insurance vs. membership plan comparison sheet with them to help show the patient the value.

"Yes, that sounds great. How do I become a member?"

Let them know they will be able to sign up for the plan once their insurance year is complete or have them use your enrollment link to pre-enroll so they will be in the system.

or

"Ok, thanks for the information. I'll think about it or No, thanks, not today"

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Existing Patient with Hygienist

"Mr. Smith, you are one of my favorite patients and you are so good about your routine care appointments. As we are approaching Open Enrollment season, we are sharing with our patients about our new membership plan and many of them have found our membership plan to be very competitive with traditional insurance. Would you be interested in learning more?"

"Yes, that would be great."

Let them know one of your team will go over the plan brochure with them and explain the benefits of the reduced rates and savings for their preventative care along with the additional discount on restorative care. Let them know they can walk through the insurance vs. membership plan comparison sheet with them to help determine the best benefit plan for their needs

After the team has gone over the plan the patient may say:

"Yes, that sounds great. How do I become a member?" Let them know they will be able to sign up for the plan once their insurance year is complete or have them use your enrollment link to pre-enroll so they will be in the system.

or

"Ok, thanks for the information. I'll think about it or No, thanks, not today"

"Ok, no problem. Please take our brochure so you have the information and let me or any of our team know if you have any questions."



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Patient with Treatment Plan

"Mr. Smith, the doctor/hygienist has discussed their treatment recommendations with you and I would like to go over your treatment plan with you. I understand you currently have dental insurance but I am also happy to share with you that we have a (new) membership plan we have implemented for our patients that will help with savings not only on your preventative care but also on your treatment needs as well. Many of our patients find our plans to be very competitive with traditional insurance. Would you like to hear the details? I can also walk through a comparison sheet so you can see what makes the most sense for your dental benefits"

"Yes, that would be great."

Go over the patients treatment needs/diagnosis and then the membership plan brochure with them and explain the benefits of the reduced rates and savings for their preventative care along with the additional discount on restorative care for their treatment plan presented today. Walk through the insurance vs. membership plan comparison sheet with them to help determine the best option.

***Keep in mind that they may be able to use some of their benefits left for the year with insurance but then join the plan in the new year and utilize the plan benefits for additional restorative care and their preventative care.**

Yes, that sounds great. How do I become a member?



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Patient with Treatment Plan Continued

Since you have your current insurance plan until the end of the year, we will utilize your benefits for the remaining year on {XX treatment} and then in the new year, we will complete your enrollment in the membership plan and apply those benefits to {XX Treatment} and your preventative care.

OR

Once we finish going over your treatment plan, I will get you set up for the membership plan and discuss any payment due today

OR

Ok, thanks for the information. I'll think about it or No, thanks, not today.

Ok, no problem. Please take our brochure with you so you have the information and let me or any of our team know if you have any questions.