



PLAN FORWARD

Best Practices

Team Practices

- **Team Familiarity** - Be sure that everyone on the team understands the plan and how it impacts your patients and practice. Everyone should be onboard!
- **Point Person** - Select a point person to be the guru of your membership plan.
- **Meeting Agenda** - Make your membership plan a meeting agenda item. Let the point person share gains, losses, or any insight to what is working or not.
- **Team Goals** - As a team, set some goals together. Be sure they are Specific, Measurable, Achievable, Realistic, and Timely.
- **Incentivize** - To really encourage your team and make it fun, implement an incentive plan. Once the goal is reached, set the bar higher!



Internal Practices

- **Identify Opportunities** - Run a daily or weekly report to see what uninsured patients are coming in. Set your goals around these numbers and come up with a game plan on how to encourage them to sign up.
- **Checkout Process** - Provide a cost of treatment comparison as an uninsured patient vs. a membership plan patient. Provide the details, show the savings, and explain the overall benefit. It is very likely that they will sign up for your plan!
- **Collateral** - Set out your brochures and flyers around the office. Be sure they are in high traffic areas and not mixed in with other informational material.



External Practices

- **Website** - Be sure that you have a page on your website dedicated to your membership plan. Make it front and center and use a widget, if possible.
- **Enrollment Link** - Your enrollment link should be placed everywhere!
 - Add it to your website, specifically on your membership plan page.
 - Hyperlink it on appointment reminders and use a catchy phrase like: "No insurance? No problem! Click here to learn about our membership plan."
 - Include it in email signatures to patients.
 - Post it on social media pages in your info section.
- **Social Media** - Post regularly about your membership plan on all social media platforms. Don't forget to use the Plan Forward graphic located in the monthly newsletter.

