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 your monthly Flossip.