EMPLOYER MANAGED MEMBERSHIP PLANS

WHERE TO BEGIN

START HERE!

Step 1: Make a short list of who to contact <u>first.</u>
Use your network! These should be your easiest conversations. ***Small business owners*** you know or have a connection to.
For example:

- Restaurant next door
- Your hygienist's spouse
- Long-term, loyal patients
- Any and all specialists you know
- Retail stores/boutiques you frequent

Step 2: Decide the best team member to have the conversation with each company. This may not be the same person each time. Who would have the best chemistry?

Step 3: Reach out and see if you can set up a time to meet for 15 minutes and tell them about your plan. *Check out our phone scripts and email templates.*

- Suggest an in-person meeting if possible
- Send two team members for the first meeting
- Meeting with the entire staff at once saves time
- If you can't get a face-to-face, a phone call works

Step 4: Prep for the meeting/call

- Know your audience, do a little research first
- Have an idea on who will say what and to whom
- Keep it short and simple, ask them questions
- Take pricing brochures & laptop, be ready to sign up new members

Step 5: During the meeting/call

- Tell them what a dental membership plan is
- Explain the benefits to patients (i.e. their staff)
- Show off your plan options (adult, kid, perio, etc.)
- Let them know, you want to grow your business while supporting the community
- Sign new members up and schedule first appointments
- If they aren't ready to commit, ask them when a good time to follow up would be

Step 6: Meeting Debrief - DO NOT SKIP THIS

- Jot down some notes, learn what works
- Create a file for each prospective company. Include the date, who attended, notes and action items.
- Set a calendar reminder to follow up
  - If they want to think on it, give them a week or so and then reach back out
  - If they have a dental insurance plan, contact them in July about dropping it.
- Send a thank you card or email with more information