



Email Campaign

- Export all email addresses for active patients without insurance
- Draft an email that is short, concise, informative and personal
- Use a catchy and specific subject
- Send the email directly from the office for a more personal touch

Direct Mail Campaign

- Export address labels for active patients without insurance
- Export address labels for ALL inactive patients
- Create a personalized letter explaining the new membership option
- Include general pricing and benefits
- Include office info to call for questions or to schedule an appointment

Statement Notification

- Include information about your plan in the memo on your statements
- Add a separate piece of paper to your statements introducing your plan

Call Campaign

- Use this for select individuals who would benefit from a direct phone call and conversation

In-office Signage & Information

- Check in/check out flyer (provided by Plan Forward)
- Operatory brochures (provided by Plan Forward)
- At checkout, staple a colored info sheet to everyone's receipt for 90 days

Verbal Campaign

- Choose the point during an entire appointment where someone should inform patients of the new plan
 - Hygienist/Assistant when walking the patient back
 - Check out person when printing receipts
 - Receptionist at check in

Digital Campaign

- Utilize your website and social media to the fullest
- Work with your website partner to add the plan, information and enrollment link to your website
- Create social media posts announcing your plan

PLAN FORWARD

Marketing Suggestions Guide

