

# Membership process

## Morning

- In the morning (or the day before) we will identify any patients to approach; people who come to see the dentist and the hygienist. Discuss with each clinician to confirm happy to invite onto membership.

## When patient arrives

- Welcome patient, and say something similar to: 'Hi Mr Smith, Dr X will be giving you a recommendation today of whether you would be a suitable candidate for our membership. Please take a look as you may have some questions you'd like to ask. Of course you can continue as PAYG, however, please note in general, our members pay less. As a loyal patient, we would love you to take advantage of the savings and benefits.'
- Give patient clipboard with: plan leaflet, fee comparison table, fee guide.

## Within surgery

- Highlighted day sheets will be put in each surgery and a matching sheet on the desk, this means we will all know which patients will follow the process below.
- Make a record on patient notes, this confirms we have given our patients all options. Ask at regular intervals, as you would a medical history, as patients' circumstances may change.
- If you have offered an incentive to join, let reception know as well as which plan, if any, you have recommended.
- Dentist to give clinical recommendation for membership.
- Nurse to remind dentist if not done, 'Please can you confirm whether Mr Smith would suit our practice membership?'

## At the desk

- Ask patient, would you like to join the membership today or do you have any questions?
- At end of the day, review how many patients followed this process, how many joined, conversion rate, reasons for not joining.
- Book a follow-up call if taking the information away.