

**clerri**

# **The Membership Effect**

**Uncovering the impact of  
membership plans on practice  
revenue and  
patient behavior**

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## The Membership Effect: Uncovering the Impact of Membership Plans on Practice Revenue and Patient Behavior **examines the challenges facing dental practices and how membership plans offer a solution.**

You'll discover compelling data that compares cash pay patients two years before joining a Clerri plan to the same patients two years later. Our data from 20,000+ dentist partners operating across all 50 states — including 7 of the 10 largest DSOs and 300+ group practices — reveals how you can significantly increase patient visits and cash production.

We'll explore how membership plans impact practice revenue and patient behavior, highlighting how our integrated cloud solution automates processes, helps you market to dormant patients, and provides performance data for ROI. Learn more about our commitment to regulatory compliance and get a glimpse into how our company culture, rooted in passion, hard work, and individuality, sets us apart in an increasingly crowded market of providers.



# Addressing issues crucial for dental practice success

Dental practices are facing multiple headwinds that are putting pressure on performance and profit. These hurdles, frequently cited by practices, often impede their success and slow growth.

## 63%

### Staffing and retention

High turnover rates — particularly at the front desk — complicate daily operations and plans to implement new initiatives.

## 58%

### Low reimbursement rates

Lagging PPO reimbursements due to inflation and rising costs reduce earnings, making cash-pay patients a key source of revenue.

## 46%

### Rising operational costs

Escalating costs of essential supplies coupled with increasing overhead expenses are directly linked to declining profitability.

## 36%

### Filling schedule gaps and revenue growth

Practices struggle with managing their uninsured and dormant patient populations, which visit infrequently or not at all — that's hidden revenue waiting to be unlocked.

A well-run membership plan takes the pressure off your team — freeing up time, easing stress, and letting you focus on patient care.

*"With the power of streamlined software to manage member enrollments and the ability to stay on top of performance, our team is equipped to simplify admin tasks, elevate efficiency, and enhance our ability to deliver exceptional care."*

**Dr. Saam Zarrabi, Rodeo Dental & Orthodontics**

\*Source: "Economic Outlook and Emerging Issues in Dentistry," American Dental Association, Health Policy Institute, December 2024.



# What is a dental membership plan?

A dental membership plan is a simple and accessible model, much like your Amazon Prime subscription, Netflix account, or Costco membership. It's a straightforward agreement between you and your patients without the complexities of insurance. Patients can access the care they need without the fear of hidden costs, making it a win-win for both parties. Like any membership plan, which gives consumers access to a range of benefits for a fixed fee, a dental plan provides patients with comprehensive dental care at a predictable cost.

Practices often struggle to find and retain new patients or reactivate dormant ones. That's where a membership plan comes in. Memberships put a group or practice in control of reimbursements while offering quality care under a model that makes financial sense to everyone.

**According to the American Dental Association (ADA), over 50% of new patients never visit again after their first visit. By moving new patients to a membership plan, practices can be confident that over 90% of them will come back, giving them control over their patient base and revenue.**

Offering preventative care as part of the membership plan and discounts on other treatments removes the fear of unpredictable costs, encouraging patients to visit regularly and accept necessary treatment. Positively impact your patients' lives by providing them with the care they need at a price they can afford.



# Driving practice growth and profitability

Implementing a dental membership plan provides several key benefits to dental practices.

## **Unlock the earning potential of uninsured patients and improve their care**

Instead of disengaged patients who visit rarely and require discounts, membership plans encourage regular visits and treatment acceptance. You control the patient relationship and fees, freeing you from third-party restrictions. This control and independence can empower you to make the best decisions for you and your patients.

## **Create recurring subscription revenue that provides guaranteed income**

With membership, patients pay you directly creating steady, reliable income you can count on. On average, practices using Clerri earn \$372 per membership each year, giving you more control and confidence in your financial future.

**Adding 300 patients to a membership plan can generate over \$111,600 in annual recurring revenue!**

## **Reduce PPO dependence**

Membership plans allow you to set your own fees and design treatment plans. They eliminate common insurance hassles such as payment processing delays, claim denials, annual maximums, and coordination of benefits, allowing you to get paid more and enabling patients to pay less, leading to improved quality of care by removing the middleman.

## **Retain new patients**

You invest significant resources to acquire new patients. However, many patients don't return for a second appointment. A membership plan helps commit new patients to a practice, guaranteeing reappointments and boosting treatment acceptance, turning your marketing expense into loyal, recurring patients, and generating significant annual revenue.



## **Reactivate dormant patients**

Practices often have large patient populations who haven't visited in a year or more, frequently due to a lack of dental coverage and the assumption that they cannot afford care. A membership plan provides the needed coverage, removing the fear of cost and encouraging them to return for care and accept treatment. Converting even a small percentage of dormant patients can add significant annual revenue.

## **Attract new cash pay patients from small businesses**

Many local businesses do not offer dental benefits due to cost and complexity. You can offer these businesses their membership plan as an affordable dental benefit option, providing a path to new fee-for-service patients and expanding their patient base.

## **Better serve the aging population**

As an alternative to increasingly limited Medicare coverage, dental membership plans provide a more affordable, simple, and accessible way for the aging population to maintain their oral health.

**The U.S. Census Bureau projects the number of Americans ages 65 and older will increase from 58 million in 2022 to 82 million by 2050.**

**Dental membership plans are a valuable alternative for seniors who do not have dental coverage through a Medicare Advantage plan or other methods, offering them a way to maintain their oral health without financial stress.**

Dental memberships offer a proactive solution for practices to grow by engaging uninsured patients, creating recurring revenue, lessening PPO reliance, improving retention, and attracting new patients. A membership model strengthens patient relationships and provides predictable income while offering quality care.



# Membership success requires more than just a plan

Clerri offers membership plans specifically designed for dental teams, taking a unique approach and a proven platform to drive success for groups and practices. However, simply having a membership plan doesn't guarantee success. Your membership plan partner should focus on these key areas:

- ◆ Data to understand plan performance
- ◆ Support expertise to optimize the plan for a practice's specific needs
- ◆ Effective management and integration through automation
- ◆ Worry- and risk-free compliance

## Proven results backed by data

When comparing cash-pay patients two years before joining a Clerri membership plan to the same patients two years later, our data demonstrates the positive impact of membership plans on patient behavior and practice revenue, debunking common misconceptions and highlighting their potential to transform the dental care landscape.

*"Our membership plan has helped patients who lost their jobs, their insurance, are retired, and to attract new patients. It's a great way to get your treatment done with discounts and not all the headaches that come with being in-network."*

**Dr. Eric Block, Acton Dental Associates**





**Membership success requires more than just a plan**

**76%**

Patients on a Clerri plan see their dentist almost twice as often as cash pay patients, averaging 3 visits compared to 1.7 visits before a membership plan.

**51%**

Practices saw cash production increase by 51% compared to a 10% increase in insurance production during the same period.

**2.6x**

Membership patients complete 95% of scheduled appointments, reducing no-show rates by 2.6x, compared to cash-pay patients not on a membership plan.

**+ 2.7x**

Uninsured patients produce \$469/year, while Clerri patients produce \$1,276/year.

**+ 2.5x**

Uninsured patients complete 2.4 procedures/year compared to membership plan patients who complete 5.9 procedures/year.

*"Offering a membership plan isn't selling, but rather fulfilling an obligation to serve our patients and determine what's preventing them from getting healthy. When patients receive care facilitated by the membership plan, they live healthier, better lives."*

**Dr. Craig Spodak, Spodak Dental Group**



**Membership success requires more than just a plan**

## **An extension of your team**

Our plan design and pricing consultants help optimize performance by monitoring data like retention, cancellations, and enrollment. We go beyond basic assistance, providing guidance informed by specific practice data and training, including self-guided modules, which help practices overcome concerns about training new staff amidst high turnover.

Practices and members deserve fast answers when they need help. Bilingual support resolves over 97% of inquiries within four business hours, minimizing operational disruptions. This strategic guidance maximizes revenue potential and empowers stakeholders to manage memberships confidently, cultivating positive patient experiences and long-term financial gains.

## **Powerful and intuitive technology**

Whether there's a need to manage an individual practice or to oversee a large group or dental support organization, a membership plan platform should automate time-consuming tasks and allow users to customize plan details, manage members, and track performance with real-time dashboards that provide precise ROI analytics.

Integration with a practice management system (PMS) provides significant automation, valuable insights, and other key benefits, including:

- ◆ Automated posting of subscription payments to patient ledgers
- ◆ Automated in-office patient enrollment by auto-populating patient data
- ◆ Automated tracking of patient benefit utilization
- ◆ Automated marketing campaigns targeting specific patient groups, such as dormant patients who haven't visited in 18+ months

*"For us, [Clerri] is a one-stop shop. There's a pathway for payment. There's a pathway for marketing. There's a pathway for materials and training. We would have to build out dedicated work streams for all these different things."*

**Andrew Shafran, COO, ProSmile**



## Membership success requires more than just a plan

Membership plans need promotion behind them. Built-in marketing tools provide extensive resources to promote your plan effectively, including welcome kits, brochures with QR codes for easy online enrollment, website integration options, digital materials, patient savings tools, and staff scripts.

A simple, intuitive online enrollment process takes your patients 1-2 minutes and includes no hidden charges or terms. Patients can choose monthly or annual payment options and never get charged enrollment fees, deductibles, waiting periods, annual maximums, reimbursements, or claims denials, reinforcing the simplicity and transparency of the patient experience. They also get access to a practice-branded portal to manage their membership.

### Regulatory compliance

Clerri is licensed in all 50 states, maintaining compliance and relationships with regulators and relieving this burden from practices. It's not a one-size-fits-all situation. Each state has unique laws and regulations governing membership plans, often under Discount Medical Plan Organization (DMPO) laws.

Compliance is not just a legal requirement but is fundamental to the long-term success and sustainability of dental membership plans and the practices that rely on them to drive more visits, higher treatment acceptance, and greater use of high-value services. Here are three key benefits of prioritizing compliance:

- 1 Build trust** among dental practices, DSOs, and patients. It's the bedrock of our business and yours.
- 2 Ensure stability** to create a predictable environment for membership plans to thrive.
- 3 Protect stakeholders** and safeguard the interests of everyone involved, from practices and patients to our team.



# The future is now: Filling schedules with cash pay patients

The vision for the future of oral care is clear: fill the daily calendars of dentists nationwide by getting more cash pay patients through their doors and returning more often. Membership plan platforms with automated renewal notifications, automatic payment processing, integration with all leading PMS, and reporting capabilities supported by AI will continue to be a powerful solution to the significant challenges facing groups and practices today. If you run an in-house plan or use a third-party provider, these are all must-haves for dental membership success.

The numbers prove it: Patients on a Clerri membership plan significantly outperform uninsured patients; they accept more treatment and receive more care, significantly impacting practice revenue. Unlock growth with proven results and start implementing or scaling your membership plan for maximum impact today.

**Contact us to learn more.**

Dental membership plans are NOT INSURANCE. Plan members pay periodic membership fees in exchange for access to discounts on certain identified dental services rendered by participating providers in accordance with the plan fee schedule. Plan members are obligated to pay dental providers directly for services rendered. Plan details, retail fees and member savings may vary by plan, provider and/or dental office location, please see specific plan terms and conditions for details. Dental membership plans are not qualified health plans under the Affordable Care Act, and do not meet the minimum creditable coverage requirements under M.G.L.c. 111M and 956 CMR 5.00. Dental membership plan(s) offered by Clerri are administered by Clerri LLC, a discount medical plan operator; with the exception of dental membership plans offered to consumers in the State of California, which are administered by The CDI Group, Inc. Mailing Address: P.O. Box 163990, Austin, TX 78716-3990. Clerri does not make payments to dental providers for services rendered to plan members. Clerri is not affiliated with or endorsed by any state insurance department. To obtain additional information about dental membership plans, please call (877) 545-4188 or email questions to [hello@clerri.com](mailto:hello@clerri.com).