

# illumitrac<sup>®</sup>

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Make the Most of Your Membership Club

# Best Practices Guide

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The practices that get the most out of their membership clubs aren't the ones with the most patients or the biggest marketing budgets. They're the ones that launch with a clear plan, train their teams well, and track the right numbers consistently.

This guide walks you through the essentials – from setting up your club to training your team, marketing to patients, and understanding why illumitrac is the right platform to power it all.

# Create Your Membership Club

Getting your club off the ground comes down to five steps. Here's the high-level roadmap:

## Step 1: Plan your club.

Define who you're serving, how many tiers you'll offer, and who on your team will own the club day-to-day. Simple, clear decisions upfront make everything easier later.

## Step 2: Set up your infrastructure.

Configure your platform, build out your membership tiers, and prepare your member-facing materials before you enroll anyone. Getting your practice management software set up correctly from the start – alerts, tracking codes, and collections workflow – keeps your reporting clean as you grow. See Section 3 for tracking guidance.



### **Step 3: Price your tiers.**

Start with your cost of care, layer in a margin, and make sure your membership fee represents clear value compared to what an uninsured patient would pay out of pocket. Most practices price a base adult plan in the range of \$25–\$40 per month. Review pricing annually as your club grows.

### **Step 4: Market your club.**

Your club only grows if patients know it exists. See Section 3 for the full marketing strategy checklist and channel-by-channel framework.

### **Step 5: Measure your growth.**

Track active member count, monthly recurring revenue, churn rate, new enrollment rate, and member vs. non-member treatment acceptance monthly. Set a 12-month target and review it quarterly with your team and your Club Success Coach.



**Want the Complete Step-By-Step Breakdown?**

[Check out the illumitrac blog →](#)

# Training Your Team

Your membership club is only as strong as the team presenting it. Every person who interacts with patients should be able to explain your club confidently, answer common questions, and walk a patient through enrollment from start to finish.

illumitrac provides a one-hour live team training session as part of onboarding – and training for new team members is always available at no additional charge through your dashboard under "My Support Reps."

Here's what your team needs to know:

## **What the club is and how it works.**

The goal isn't a scripted pitch. It's a confident, conversational answer to "what is this?" – delivered naturally at any touchpoint, by anyone on your team.

## **Why it matters to patients.**

For patients without dental benefits, your membership club is often the most affordable path to consistent care. Your team should be able to clearly explain what membership includes, what it costs, and why it's a better option than going without coverage.

## **Why it matters to the practice.**

Membership patients accept recommended treatment at significantly higher rates than standard cash patients – and a growing club means more predictable, stable revenue. When your team understands this, they become genuine advocates for the club rather than reluctant salespeople.

## How to enroll a new member.

Everyone in the office should know how to add a new member. It's a simple 4-step process in the illumitrac dashboard, and if your team is comfortable with it, enrollment can happen at any point.

## How to talk to different types of patients.

Different patients need to hear about the club differently. Here's example language your team can adapt:

### Patients With Insurance

*"Our membership club covers all your preventive care and provides discounts on additional treatment – for a monthly fee. If your insurance situation changes, it's an easy option and if you know anyone looking for affordable dental care, we can help."*

### Uninsured / Cash Patients

*"You don't need insurance to get great care. We have an in-house membership club that covers your cleanings and exams and gives you a discount on anything else you need – for a simple, monthly fee. No deductibles, no waiting periods, no surprises. It's easy to sign up and you can start using your benefits today."*

### Seniors

*"If you're on Medicare or thinking through your coverage options, it's worth knowing that you're not generally covered for routine dental care. Our membership club is a simple, alternative – it covers your preventive visits and gives you discounts on any additional treatment, for a predictable monthly fee. A lot of our patients find it's a much simpler and more affordable option."*

# Marketing Strategy Checklist



A great membership club only grows if patients know it exists – and that means more than one conversation, in one place, one time. Use this checklist to make sure your marketing strategy is fully activated.

## Target cash patients first.

- Pull a cash patient report, they are your highest-priority prospects. Each one is a potential club member.

## Order marketing materials.

- Create marketing materials for your club. Physical assets in your waiting and hygiene rooms will normalize the club.

## Set calendar reminders.

- Set recurring reminders so your marketing cadence doesn't drop off after the initial launch push.

## Communicate your club in more than one way.

- Your coach can review your current approach and identify the biggest opportunities for your specific practice.

## Schedule a marketing strategy call with illumitrac.

- Your Club Success Coach can review your approach and identify the biggest opportunities for your practice.

**Ready to Put a Complete Marketing Plan Together?**

[Download Our 7 Touchpoints to Success Guide →](#)

# Why illumitrac For Your Dental Membership Club

There's no shortage of ways to run a dental membership club. But most options ask you to trade something – your time, your revenue, or your data – to make it work.

DIY means building and managing everything yourself. It's low cost but doesn't scale. **As your club grows, so does the manual work.**

Third-party hosted platforms take the administrative burden off your team. **They also take a cut of your revenue and your data.**

illumitrac was built to give you the best of both *without the trade-offs of either*. Your club runs under your name, your branding, and your data belongs to you. We handle the backend (enrollment, billing, renewals, disputes) so your team doesn't have to.

And as your club grows, so does what you get from illumitrac. Our Loyalty Program rewards your progress with benefits at every member milestone. The more your club grows, the more support, resources, and tools unlock automatically.

From onboarding to scale, your Club Success Coach is with you every step of the way – available for one-on-one strategy sessions, team check-ins, annual pricing reviews, and growth planning.

**illumitrac isn't a platform you outgrow – it grows with you.**



## Ready to **Get Started?**

Schedule a free demo and we'll walk you through the platform, your pricing options, and what your club could look like in its first 12 months.

Schedule Your **Free Demo** →

### Questions?

Reach us at [support@illumitrac.com](mailto:support@illumitrac.com) or (541) 342-2958.