Drafted by Patricia Casasanta

December 15, 2023

A. Company Information

1. **Company Name**: PPO Negotiation Solutions LLC
2. **Corporate Headquarters**: 8183 Rhode Dr, Shelby Twp, MI 48317
3. **Contact Information:**
    - Phone: 586.803.7561
    - Intake Specialist**:** 586.804.4491
    - Website: https://pponegotiationsolutions.com

4. **Management Team and Biographies:**
    - Patricia Casasanta - Dental Industry Speaker and CEO
    - Sara Fisher - Chief Financial Officer (CFO)
    - Samantha Foy, Director of Operations
    - Susan Murphy, Training and Development Director

Patricia Casasanta - Chief Executive Officer (CFO) (October 1995 to present) Dental Industry Speaker and CEO Patricia Casasanta - Dental Industry Speaker and CEO: With a career spanning nearly four decades in the dental industry, Patricia Casasanta has worn many hats, from dental assistant and RDH to practice consultant and Human Resource specialist. She began her journey as the owner of Performance Plus Staffing in 1995, which later underwent a name change in October 2012 to become Strategic Practice Solutions. This rebranding aimed to expand the company's scope to include practice management services. In 2019, Patricia spearheaded the addition of the PPO Negotiations division, born out of her own experiences in practice management consulting. Patricia seamlessly integrated her vision with the Strategic Practice Solutions mothership. Her remarkable achievements include:

★ Achieving an impressive 50% year-over-year growth for four consecutive years at PPO Negotiations, showcasing her exceptional strategic acumen and business expertise.
★ Enhancing the operational efficiency of PPO Negotiation Solutions, simplifying access for dental practices to various insurance networks. Her contributions resulted in a significant 15% average annual net profit increase for clients nationwide.
★ Fostering a collaborative and excellence-driven culture within PPO Negotiation Solutions, which led to a consistent 5-star rating on Google reviews, underscoring the high level of service quality and customer satisfaction.
★ Developing and executing robust hiring, training, and retention strategies, resulting in optimized operational efficiency and a remarkable 100% employee retention rate over the past seven years. This achievement reflects Patricia's commitment to team members and clients alike.
★ Playing a pivotal role in developing a highly successful marketing system, one of several key factors contributing to an impressive 50% year-over-year growth for four consecutive years.

In addition to her role at PPO Negotiations, Patricia Casasanta is a Dental Industry Speaker with over a decade of experience at Strategic Practice Solutions, LLC. Her speaking engagements have made a significant impact in the dental industry, where she collaborates with prestigious organizations such as the Michigan Dental Association (MDA) and Women in Dentistry. Patricia's national recognition through certifications from the American Dental Association (ADA) further solidifies her industry leadership.

Patricia's journey exemplifies her dedication to excellence and her ability to drive growth and success, making her a prominent figure in both the dental industry and the world of PPO negotiations within Strategic Practice Solutions.

Sara Fisher - Chief Financial Officer (CFO) (October 1999 to present)
Sara Fisher is a seasoned financial executive with nearly two decades of experience as the Chief Financial Officer (CFO) across all entities associated with Strategic Practice Solutions. Since she joined the organization in 1999, Sara has been a cornerstone of financial stability and strategic growth for the entire Strategic Practice Solutions family. As CFO, she oversees a wide spectrum of responsibilities vital to the fiscal well-being of the organization.

In her role, Sara spearheads strategic financial planning, ensuring that financial decisions align with the overarching objectives of all Strategic Practice Solutions entities. Her meticulous attention to detail and financial acumen have been instrumental in accurate financial reporting, budgeting, and cash flow management. Sara is also dedicated to mitigating financial risks and maintaining regulatory compliance across all entities. Her leadership and financial expertise have played a pivotal role in the collective growth and financial success of the organization.

Sara Fisher's tenure as CFO across all entities associated with Strategic Practice Solutions exemplifies her unwavering commitment to financial integrity, strategic growth, and effective financial management, making her an invaluable asset to the entire organization.

Samantha Foy, Director of Operations-PPO Negotiation Solutions (March 2023 - present):
Samantha Foy is a highly experienced professional in the dental industry, currently excelling in her role as the Director of Operations at PPO Negotiation Solutions LLC since March 2023. Her appointment to this position is a testament to her vast expertise and leadership skills in dental operations management.

Before joining PPO Negotiation Solutions, Samantha made significant contributions as the Director of Operations at Dental Town LLC, a role she held from October 2016. During her tenure there, she played a pivotal role in streamlining operations and enhancing the overall efficiency of the organization.

Her journey in the dental field was further enriched by her experience as a Treatment Coordinator at Old Milton Dental in Alpharetta, Georgia. From January 2014 to September 2016, Samantha effectively managed patient treatment plans and facilitated optimal patient care, showcasing her ability to handle both administrative and patient-centric responsibilities with equal proficiency.

Samantha’s career in dentistry began at Worful Family Dentistry, where she served as a Certified Dental Assistant from August 2008 to January 2016. Her time there provided her with a solid foundation in dental care practices and patient interaction, skills that have been invaluable in her ascent to more strategic and operational roles.

Based in Alpharetta, Georgia, Samantha Foy is recognized for her commitment to enhancing patient care, improving operational workflows, and leading teams to success in the fast-paced dental healthcare industry.

Susan Murphy, Training and Development Director - PPO Negotiation Solutions (Feb 2021 - Present)

Susan serves as the Training and Development Director at PPO Negotiation Solutions, where she has directed a team of instructional designers to create a comprehensive onboarding system using the LMS, Absorb. Collaborating closely with the Asana coach, she has designed and taught an effective project management system to new team members. Susan's commitment to training and support has resulted in a remarkable 100% client satisfaction rate, backed by over 100 Google reviews with a 5-star rating. Her role allows her to leverage her expertise in training and development to drive growth and excellence within the organization.

Additional Experience: With a strong foundation in the dental industry, Susan has excelled in various roles, including Dental Receptionist and Office Manager in dental practices. Her expertise in these roles has equipped her with excellent communication, organizational, and leadership skills, which she applies to every aspect of her work.

5. Company History:

PPO Negotiation Solutions, a dynamic division of Strategic Practice Solutions, began its journey in 2019. Strategic Practice Solutions, originally founded in 1995 as Performance Plus Inc., underwent a significant transformation in October 2012 when it rebranded itself as Strategic Practice Solutions. This rebranding marked a pivotal moment in the company's history as it expanded its focus beyond staffing solutions to provide comprehensive practice management services and specialized training programs. Since its inception, Strategic Practice Solutions has remained dedicated to empowering dental practices and professionals, consistently striving to redefine industry standards and drive success.

6. Financial Stability Statement (Qualitative)

Strategic Practice Solutions, the parent company of PPO Negotiation Solutions, was founded in 2012, and the PPO Negotiation Solutions Division was added in January 2019. Throughout our journey, we have successfully navigated significant economic challenges, including the Great Recession from 2007-2009 and the unprecedented disruptions caused by the COVID-19 pandemic in 2020-2021. Despite these obstacles, we have maintained strong financial stability over the years.

Growth: Over this period, our company has experienced remarkable growth, expanding our services nationally from the East Coast to the West Coast. With a strong presence in key states such as Michigan, Ohio, Indiana, Texas, Pennsylvania, New York, Massachusetts, Montana, California, North Carolina, South Carolina, and Florida, we have successfully entered and thrived in diverse markets. Our new clients are sourced from various channels, with 20% coming from referrals, 20% from repeat customers, 30% from active engagement on social media platforms such as Dental Town and Mommy Dentist, and the remaining 30% are through various other targeted marketing efforts.

We have consistently expanded our operations, entered new markets, and diversified our product/service offerings. This sustained growth is indicative of our ability to capture opportunities and adapt to changing market dynamics.

Profitability: Our company has maintained strong profitability, with an EBITDA margin of 35%, reflecting efficient cost management and competitive pricing strategies. We have consistently achieved healthy profit margins, demonstrating our ability to generate value for our stakeholders.

Liquidity and Cash Flow: We prioritize liquidity and maintain a solid cash position, with enough liquid cash to cover company costs for an entire year, ensuring that we can meet our financial obligations and seize growth opportunities. Our cash flow management practices have enabled us to weather economic fluctuations and invest.

Innovation and Research & Development: We are committed to innovation and invest heavily in research and development to stay at the forefront of our industry. This approach not only enhances our competitiveness but also fosters long-term sustainability. We are continuously exploring ways to automate our processes, increase efficiency, reduce errors, and ensure projects run on a timely basis. Our dedication to client satisfaction remains a driving force behind our innovation efforts.

Annual Budget for Innovation: As part of our commitment to innovation, we allocate a dedicated annual budget towards research, development, and technological advancements. This budget ensures that we have the necessary resources to explore new ideas, technologies, and strategies, further solidifying our position as an industry leader and meeting the evolving needs of our clients.

Strategic Growth: Our financial stability is closely tied to our strategic growth initiatives. We continually assess market trends, explore new partnerships, and evaluate expansion opportunities to drive long-term value creation.

Customer-Centric Approach: Our unwavering focus on customer satisfaction remains a cornerstone of our financial stability. We value our customer relationships and prioritize delivering exceptional value and service.

While specific numerical figures are not provided, this qualitative overview conveys the company's financial strength, growth trajectory, and commitment to sound financial practices.

7. Associations and Partnerships:

PPO Negotiations has established strong connections with reputable professionals and organizations, enhancing our credibility and expanding our network of referrals. Notable partnerships include:

Howard Bliwais, CPA: We have developed a productive relationship with Howard Bliwais, a certified public accountant, who has witnessed the positive outcomes of our work for his clients. As a result, he regularly recommends our services to others seeking similar solutions.

Doren and Mayhew (Contact: Stephen Skok): Our collaboration with Doren and Mayhew, an accounting firm, has been mutually beneficial. They have referred clients to us after observing the benefits we bring to their clients. Additionally, Patricia Casasanta, has been a featured speaker at three of their events, further strengthening our partnership.

DBS Accountants (Contact: Ted Schumann): DBS Accountants is another valued partner that has referred clients to us based on their positive experiences with our services. This ongoing collaboration has contributed to our growth and reputation.

In addition to these partnerships, we are proud to highlight our credentials and affiliations:

- ADA CERP Certified since 2016: Strategic Practice Solutions has been certified by the American Dental Association's Continuing Education Recognition Program (ADA CERP) since 2016, underscoring our commitment to providing high-quality educational resources and services to dental professionals.
- Member of the Academy of Dental Management Consultants since 2015: We have been active members of the Academy of Dental Management Consultants since 2015, with a current effort to reinstate our membership. This affiliation reflects our dedication to staying informed about industry trends and best practices while fostering valuable connections within the dental management community.

B. Company Services

1. Services Description:

[Provide a detailed description of the services offered]

We proudly offer our services nationwide, backed by extensive knowledge and expertise in navigating complex insurance networks, with a particular emphasis on the challenging Michigan market. Michigan is renowned for its intricacies, especially concerning UCCI, BCBS of Michigan, and Delta Dental. PPO Negotiation Solutions, headquartered in Michigan, leverages its profound understanding of these payors to deliver the following services:

▪ **Re-Credentialing**: Multi-Location/Multi-Providers and Private Practices

Our Re-Credentialing service ensures that organizations and private practices stay up-to-date with the necessary annual documentation required to maintain their network participation. Fees are calculated based on the number of providers and the number of networks with direct contracts.

▪ **Optimization**: Multi-Location/Multi-Providers and Private Practices

Optimization is a comprehensive initiative designed to boost the financial sustainability and profitability of dental practices. This project involves a meticulous evaluation of a dentist's existing participation in various insurance networks. It includes identifying networks with higher fee schedules and strategically rerouting dental practices to these networks. Simultaneously, it involves eliminating networks that may hinder financial growth.

Typically spanning up to a year, the optimization project allows for the development of a strategic game plan and the implementation of network changes at various milestone moments. This phased approach minimizes disruptions in coverage while maximizing revenue potential. Our goal is to foster long-term financial success and practice growth through optimized insurance network affiliations. Fees are structured based on 20% of the first-year gains, and training is provided to the administrative team.

▪ **Credentialing Acquisition**: Multi-Provider or Single Provider

Credentialing Acquisition involves comprehensive background work on the seller's network participation and fees while negotiating higher rates with the client. We educate clients on how to operate while seeing patients "out of network" during the credentialing process, at least until they obtain an effective date as in-network providers. We also provide coaching on how the seller's networks need to be terminated to prevent the buyer from inheriting fees. Our services encompass everything from negotiations to ensuring correct claims payment. Training is provided to the administrative team.Fees are calculated based on the number of providers and number of locations. Currently the rate is $6,100.00 for 1 location/ 1 provider and an additional $2,900.00 per additional provider.

▪ **Credentialing De Novo**

In the Credentialing De novo service, we educate clients on how to operate while seeing patients "out of network" during the credentialing process, especially until they secure an effective date as in-network providers. We also coach buyers on the PPO contracts they hold from past places of employment that need to be terminated to maximize BCBSM claims payment on the highest fees. Our comprehensive services encompass negotiations and ensuring accurate claims payment. Training is provided to the administrative team. Currently the rate is $6,100.00 for 1 location/ 1 provider and an additional $2,900.00 per additional provider.

▪ **Maintenance Package (Post-Project) - Goal 2024:**

At PPO Negotiation Solutions, we continuously strive to meet the evolving needs of our valued clients. In response to requests from past clients, we are diligently working to design a comprehensive Maintenance Package set to launch by 2024. This package is specifically crafted to ensure that the benefits gained from our optimization projects are sustained and optimized over the long term.

Our Maintenance Package will include a suite of services and support designed to keep your dental practice on the path to financial success and growth. We understand that ongoing maintenance is key to preserving the gains achieved during the initial project.

At PPO Negotiation Solutions, we are committed to providing dental practices with the strategic solutions and knowledge necessary to navigate the complex landscape of insurance networks, ensuring financial success and sustainable growth.

2. Success History with Dentists:
Our unique approach to dental practice optimization ensures that the average dentist can expect a substantial increase in overall revenue. A practice averaging a million in collections could anticipate an annual increase of 15%-20%, depending on the Delta Dental piece, resulting in a significant boost in revenue. These impressive outcomes underscore our commitment to delivering tangible results for our clients and partners.

Past Clients and Testimonials: Listed below are a few past clients who have benefited from our services. We invite you to watch their video testimonials or peruse over their google reviews. Additionally, we have included a video case study from a past client, Dr. Allen Jahangiri, who is based out of Texas. Exploring our detailed case studies will provide valuable insights into the remarkable transformations we have facilitated in dental practices. Our track record of success speaks volumes about our ability to drive positive change and achieve exceptional results, even in markets like Texas that run very similar to the Michigan market,

Chart 1.1: List of Michigan Client and Project Outcomes

Client Name	State	Project Type	Annual % Gains	Annual Gain Amount	Video Testimonial Link
Dr. Michael Simony	Mi	Optimization*	20%	$425,000	Dr Simony Dental Insurance Services
Dr. James Latinis	Mi	Optimization*	20%	$200,000	DR LATINIS Dental Insurance Services
Dr. John Dobry	Mi	Optimization*	20%	$120,000	ANN MARIE Dental Insurance Services
Dr. Robert Covek	Mi	Optimization*	16%	$112,000	Refer to Google review snip it below
Dr Jason Mantey	Mi	Optimization*	15%	$102,000	Refer to Google review snip it below

* " **Optimization Insurance Project**" is a comprehensive initiative aimed at enhancing the financial sustainability and profitability of dental practices. This project involves a meticulous evaluation of a dentist's existing participation in various insurance networks. It includes the identification of networks that offer higher fee schedules and the strategic rerouting of dental practices to these networks. Simultaneously, it involves the elimination of networks that may impede financial growth.

The optimization project is typically structured to span up to a year, allowing for the development of a strategic game plan and the implementation of network changes at various milestone moments. This phased approach ensures minimal disruptions in coverage while maximizing revenue potential for dental practices. The primary objective of this project is to foster long-term financial success and practice growth by optimizing insurance network affiliations.

J
Jason Mantey
1 review · 1 photo
★★★★★ a month ago

I recently had PPO Negotiation Solutions help me increase my reimbursement rate from insurances dramatically. I would not be able to afford continuing business as I was before! Before renetworking our participation with insurance I was simply surviving, but thanks to PPO Negations Solutions I am now thriving! Tricia was great to work with, very knowledgeable and professional. I am so glad a went through the process with them, it was so worth it!

K
Kathy Covek
4 reviews
★★★★★ 8 months ago

PPO Negotiation Solutions has made our dental office much more profitable. I had no idea how complicated the insurance game is in the dental field. Be assured that the insurance companies will pay you absolutely the lowest fee possible through umbrella's. It is so complicated that I hired PPO Negotiation Solutions. It would have taken me years to figure out the insurance games. They have been a tremendous help and I recommend them to every practice that I know. I am so grateful for all of their guidance through the entire process! They have made a huge difference increasing our bottom line!!!

Reply Like

3. Michigan-Specific Statistics:

[If applicable, provide Michigan-specific statistics]

Michigan holds a special place in our history at PPO Negotiation Solutions. We began our journey by exclusively serving the Michigan market, and it remains a significant part of our business. In fact, approximately 50% of our business continues to come from the Michigan market, which is where we started and honed our expertise.

However, as our reputation for excellence grew, so did our reach. In 2020, we expanded our services nationwide, now proudly assisting dental practices and professionals across the United States. While we have embraced the opportunity to serve clients from coast to coast, Michigan remains a vital and cherished part of our story.

4. Service Explanation for Laypersons:

[Make the explanation of your services understandable to laypersons]
At PPO Negotiation Solutions, we specialize in helping dental practices make the most of their insurance networks to achieve financial success and long-lasting growth. We work with practices all across the country, and our team is especially skilled in dealing with the tricky Michigan market, which involves navigating UCCI, BCBS of Michigan, and Delta Dental.

Here's what we do in simple terms:

> **Keeping You In-Network:** We help dental offices stay connected to insurance networks by taking care of all the paperwork needed each year. Think of it as ensuring they don't get 'disconnected.' Our fees are based on how many providers and networks you have.
>
> **Maximizing Your Earnings:** We have a clever plan to make sure dentists get paid more for the work they do. We look at all the different networks they belong to and figure out which ones pay the most. Then, we make sure they work with those networks. It's kind of like helping them choose the best-paying customers.
>
> **Making Sure Things Run Smoothly:** This part takes about a year, and it's like creating a game plan. We carefully switch dentists to better-paying networks, making sure they never lose coverage. It's all about helping them make more money while keeping their patients happy.

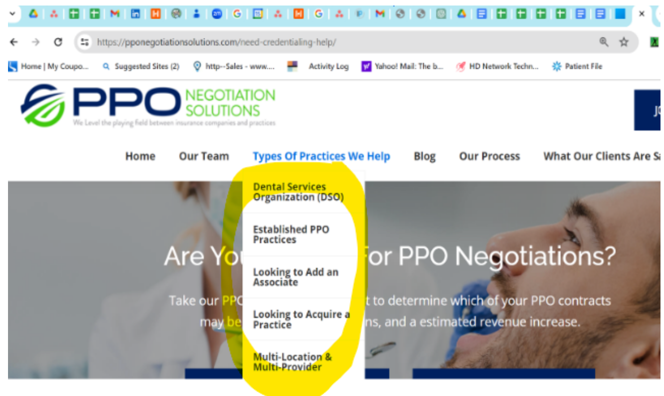
At PPO Negotiation Solutions, we're all about making dental practices more profitable and ensuring they have everything they need to succeed with insurance networks. We're the Dentist's partners in navigating the complex world of insurance, so they can focus on what they do best—keeping smiles healthy!

5. Implementation Process for MDA Members:

[Explain the process an MDA member would follow to implement your services]

To implement our services, MDA members can simply reach out to us directly by calling our office at 586.803.7501. Alternatively, they have the option to complete an online survey, after which they can schedule a consultation with our team. During this consultation, we will discuss their unique situation and tailor our services to meet their specific needs

a. Go to pponegotiationsoltuions.com and select the type of service needing assistance with.



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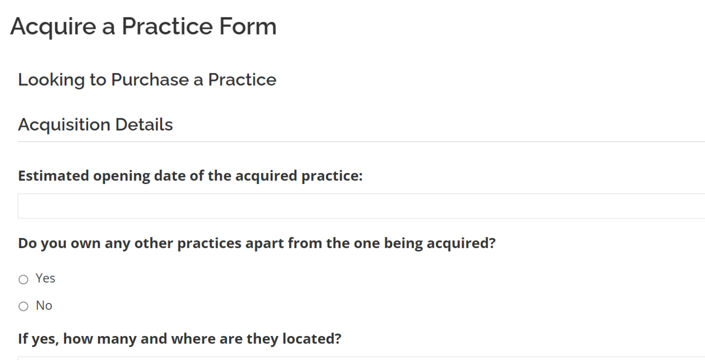
b. complete the survey associated with their desired service



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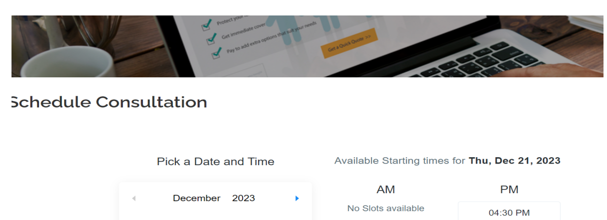
c. The MDA Member will then be taken to a calendar to schedule the 30 minute consultation



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6. Competitive Differentiation:

[What differentiates your company and its services from competitors?]

Our company, PPO Negotiation Solutions, stands out in the dental services market for several compelling reasons. First and foremost, we pride ourselves on our proven track record, client satisfaction, and the strong referral base we've built over the years. Approximately 20% of our clients, many of whom previously engaged with competitors, have reported more substantial gains since transitioning to our services. This trust in our expertise and the active referrals we receive are a testament to the effectiveness of our approach and the tangible results we consistently deliver. Notably, 20% of our business is generated through referrals from satisfied past clients, a clear indication of our impact and the trust we've earned.

> **Micheal Kirchner**
> Local Guide · 26 reviews
> ★★★★★ 10 months ago
>
> Tricia did such a wonderful job! She went above and beyond and did things for the office that I did not know was possible. They negotiated an increase in fees of between 20 and 30% depending on the carrier and that was after another company had negotiated for us 3 years ago. I highly recommend them.

Furthermore, our digital presence is a reflection of our engagement in professional online communities. Approximately 30% of our clientele discovers us through platforms like Dental Town, Mommy Dentist and various dental-related Facebook groups. This presence underscores our reputable standing in the industry and the strong connections we've formed with our peers and clients.

> **Paraiso Dental**
> 1 review · 1 photo
> ★★★★★ 8 months ago
>
> Great company. At the beginning of our project, they did a review of our situation and presented us with a project plan on an Excel sheet where it was well explained the current and what was been left on the table, they actually substantiated their claims with data and then they showed us how their work would impact our office. Since they started, we added an associate, and that initial number was doubled by the time the new negotiated fees took effect. I had used other companies before that did get the fees negotiated but never made the path for us to get paid those fees, and that was key here; although the others were significantly lower priced, their work never made the office much. I Highly recommend them.

Our localized expertise in Michigan's network operations further sets us apart from competitors. We possess an in-depth understanding of state-specific nuances, allowing us to navigate and leverage them for the benefit of our clients.In terms of accountability and transparency, we are unwavering in our commitment. We meticulously track and report our results, ensuring transparency and delivering on our promises. This approach enables us to continuously refine our strategies and adapt to our clients' evolving needs.

Our exceptional service quality and follow-through are also differentiating factors. Our team's dedication to providing exceptional service, underpinned by our deep knowledge and thorough follow-through, significantly contribute to the positive outcomes our clients experience.

Lastly, our exceptional online reputation speaks volumes. We proudly maintain a 5-star rating on Google, based on 98 reviews. This rating reflects the high level of satisfaction among our clients and underscores our commitment to upholding the highest service standards.

While I cannot provide specific insights into the services offered by competitors, I can confidently affirm that our dedication to delivering tailored solutions, maintaining transparency, leveraging our unique local expertise, and building a robust referral and online community-based client base are the cornerstones of our service's success. We continuously strive to exceed expectations and deliver exceptional value to our clients.

7. Network Participation Analysis:

[Discuss if network participation analysis is available]

During the consultation call mentioned in question #5 above, which pertains to the Implementation Process for MDA Members, we identify if the practice is eligible for significant increases in their claim reimbursement. If eligibility is established, we then offer a comprehensive evaluation. This evaluation serves multiple purposes, including:

Facilitating Negotiations: It allows us to initiate negotiations with the relevant insurance company on behalf of the practice, seeking to leverage favorable terms and conditions.

Assessing UCR Fees: We conduct a thorough assessment of the practice's Usual, Customary, and Reasonable (UCR) fees to ensure they are competitive and align with industry standards.

Analyzing PPO Group Fees: We examine the fees associated with each PPO group that the practice holds direct contracts with

Evaluating Payor Mix: Our evaluation includes an analysis of the practice's payor mix, providing insights into the distribution of patients across various insurance groups.

Procedure Code Utilization: We assess the utilization of procedure codes within the practice, identifying opportunities for optimization and increased reimbursement.

Identifying Reimbursement Increases: Our comprehensive evaluation aims to pinpoint the specific areas where we can secure increases in claim reimbursement, ultimately enhancing the practice's financial performance.

8. Credentialing Services:

[Discuss if your company offers credentialing services]

Refer to section B1 reply

C. Pricing and Discounts

1. Standard Fees:

[Provide information on standard fees] _ refer to chart 2.1 below

2. MDA Member Benefits:

[List discounts or benefits for MDA members]_ refer to chart 2.1 below

Chart 2.1L services, fees, and applicable discounts:

Service	Standard Fee	MDA Member Discount	MDA Endorsement Proceeds
Comprehensive Network Participation Assessment	$650.00 per location	$100.00	$0.00
Level I Credentialing Denovo's [1 location , 1 provider]	$6,100.00	2% off project cost	$100
Level I Credentialing Acquisition [1 location , 1 provider]	$6,100.00	2% off project cost	$100
Level II -Optimization	20% of annual gains	2% off project cost	$150.00
Level II -Optimization	20% of annual gains	2% off project cost	$200.00
Level IV -Optimization	20% of annual gains	2% off project cost	$700.00

D. Sales and Customer Service

1.Sales Process Description:[Explain the typical sales process]

Initial call or consultation is scheduled.

Step 1: Review survey (if completed) or conduct a Q&A to identify the prospect's situation.

Step 2: If prospects pre qualifies for optimization or credentialing project a more thorough Evaluation is needed.

Step 3: An Invoice for the assessment is issued along with an email with detailed instructions On the reports needed.

Step 4: The assessment is prepared, including final negotiations with a network.

Step 5: Present findings to the client [approximately 3-4 weeks after engagement].

Step 6: If the client qualifies for the optimization project: We engage in a detailed discussion regarding the potential financial gains, project timeline, cost structure, and payment plan options.

Step 7: If the client does not qualify for substantial gains: In such cases, we transparently share information explaining why the client may not qualify for substantial gains. Additionally, we provide actionable steps and guidance on how they can still achieve slight improvements in their situation, accompanied by clear instructions


Danise Conejo-Simi
3 reviews · 1 photo
★★★★★ a month ago

Working with Tricia and her associates has been a pleasure. They are very detail oriented, efficient and thorough. I never felt rushed or pushed into anything from our first conversation to our last. I felt her professionalism was impeccable throughout this process. She gave me very good insight and valuable information. The best part of this experience was the fact that she let me know we were doing a good job and there wasn't a significant change they could make, no baloney, saved us investing in something that would not offer a significant return. I can't remember the last time I dealt with a company this honest. The initial investment for her (their) analysis was worth it! I cant say thank you enough, our practice appreciated working with you!

Step 8: After presenting the assessment findings, we provide the prospect with a comprehensive project proposal. We also offer references that the prospect can reach out to upon request.

Step 9: A kick-off is scheduled to introduce clients to the PPO team they have been assigned to.

2. MDA Member Participation Tracking:
[Describe mechanisms for tracking MDA member participation]

We have established an efficient mechanism for tracking MDA member participation through our Asana platform, which allows us to monitor specific aspects of our engagements with members. Here's how we track key information:

Project Types: Within our Asana platform, we maintain a comprehensive list of project types and categories. When we engage with MDA members on various projects or services, we categorize each project type accordingly. This allows us to classify and track the specific nature of each project, such as optimization, re-credentialing, credentialing acquisition, or other service types.

Referral Sources: For each project or engagement with an MDA member, we can document the referral source that led to their participation. Whether the referral came from within the MDA, a colleague, or another source, we capture this data within Asana. This information helps us understand the effectiveness of our referral channels and allows us to express our gratitude to those who refer clients to us.

Project Costs: Within our Asana platform, we have dedicated fields for meticulous financial tracking associated with each engagement. This comprehensive approach allows us to record and monitor various financial aspects, including project costs, payment plans, and the projected duration of each project.

Data Compilation and CSV Export: At regular intervals, we compile the tracked data on project types, referral sources, and project costs from Asana. This data is organized and structured for easy analysis. We then utilize Asana's export functionality to generate CSV files containing this information.

By utilizing Asana and its data export capabilities, we can efficiently track and manage project types, referral sources, and project costs related to our engagements with MDA members. This system enables us to maintain clear records, optimize our services, and continuously improve our offerings to provide maximum value to our MDA members

3. Statewide Coverage:
Can your company cover the entire State of Michigan?

Yes, our company has the capability to cover the entire state of Michigan. We have a wide-ranging presence and resources that enable us to provide our services across the entire state efficiently and effectively

4. Customer Complaints Handling:
[Describe how customer complaints are handled]

Step 1. **Incident Recognition and Early Detection**: Our journey toward 100% client satisfaction begins with the diligent recognition of incidents. We emphasize the early identification of explicit and implicit signals of client dissatisfaction, ranging from direct expressions of discontent to recurring concerns.

Step 2. **Effective Incident Management:** In the rare event of an incident or complaint, our team members are equipped to handle it with utmost professionalism and promptness. This phase involves active listening, transparent communication, and team involvement. We meticulously document each step for quality control purposes.

Step 3. **Mastery in Report Writing:** Crafting comprehensive, clear, and actionable incident reports is a fundamental aspect of our training. These reports encompass a detailed description of the situation, actions taken, proposed solutions, outcomes, and relevant additional details.

Step 4. **Hands-On Application:** Practical training opportunities are provided through scenario-based exercises and report drafting. This phase ensures that our team members can effectively recognize, respond to, and resolve incidents while fostering continuous learning and improvement.

Step 5. **Efficient Documentation:** Our team members become proficient in utilizing our documentation platform, Asana. This streamlined system allows for the systematic documentation of incident reports and easy access when required. We also keep our team updated on potential future automation enhancements to enhance efficiency.

Step 6. **Quality Control Calls and Client Feedback:** Upon the completion of each project, we conduct quality control calls with our clients. During these calls, clients provide valuable feedback on their overall experience. Our team assigned to the project receives scores and comments from the client, allowing for an assessment of their performance.

Step 7. **Continuous Improvement:** We view each incident and quality control call as an opportunity to learn, enhance our systems, and better serve our valued clients. Feedback from clients contributes to our continuous improvement efforts, ensuring that we consistently deliver the highest standards of service and satisfaction.

5. Operational Hours:
[List your hours of operation]

Monday	7:30 AM–5 PM
Tuesday	7:30 AM–5 PM
Wednesday	7:30 AM–5 PM
Thursday	7:30 AM–5 PM
Friday	7:30 AM–5 PM

E. Marketing

1. MDA Marketing Plan:

A. MDA Endorsement Marketing Plan Overview:

Direct Mail Campaign:
- Targeted mailing to MDA provider list.
- Compelling endorsement message and call to action.

Newsletter Announcement:
- Feature endorsement in quarterly newsletter.
- Highlight significance and include success stories.

Drip Campaign Integration:
- Gradual email introduction of MDA endorsement.
- Encourage engagement and inquiries.

MDA Promotional Flier:
- Create compliant fliers with MDA endorsement to be included with any MDA mailers.
- Emphasize benefits of MDA-endorsed services.

Advertisement Opportunities:
- Explore industry publication ads.
- Design impactful ads showcasing MDA endorsement

Evaluation and Continuation
- Track ROI of marketing efforts.
- Refine strategies based on data-driven insights.

B. MDA Approval Process:

Initial Draft:
- Create draft aligning with MDA guidelines.

Submission for Approval:
- Submit draft for MDA review.
- Provide campaign details.

Compliance Check:
- Address MDA questions or concerns.
- Revise as needed for compliance.

Final Approval:
- Obtain MDA's written approval.

Execution:
- Execute campaign as approved.
- Monitor and report performance.

By following this comprehensive plan and obtaining MDA approval, we ensure compliance and effectiveness in promoting our MDA-endorsed services to providers.

2. Marketing Collateral:
[List marketing materials you would develop for the MDA program]

We are committed to supporting the MDA program and are willing to provide a range of promotional materials to assist in marketing efforts. However, our approach is subject to cost considerations and the expectation of a measurable return on investment (ROI). We are open to discussing and developing specific marketing materials in collaboration with the MDA that align with both parties' goals and resources.

3. Direct Mail Campaign:
Would you fund at least one direct mail campaign annually?
Yes, we are committed to supporting the MDA program, and we are willing to fund at least one direct mail campaign annually. However, the details and scope of the campaign would need to be discussed and agreed upon to ensure it aligns with our marketing budget and ROI.

4. MDA Annual Session Participation:
Would you purchase a booth at the MDA Annual Session?

Yes, we would be open to purchasing a booth at the MDA Annual Session, provided that the cost and location of the booth would at least cover the expenses associated with the event_ for continued participation. Additionally, having a speaking engagement to send attendees to the booth would be a desired request. I have previously spoken two times for the MDA on the topic of '*PPO Games: What the Insurance Companies Don't Want You to Know.*' & " Core: Guide to Case Acceptance" and all sessions had a favorable attendance. We value the opportunity to engage with attendees and contribute to the success of the event

5. Advertising in MDA Magazine:
Would you advertise in the MDA monthly magazine?

Yes, we would consider advertising in the MDA monthly magazine, with continued participation pending a positive ROI. We believe in making strategic marketing decisions that align with our business goals, and we would evaluate the effectiveness of our advertising efforts in the magazine based on the ROI it generates

6. MDA Services Marketing Costs:
Is MDA Services expected to incur any marketing costs? If yes, please explain.

Our responses to Questions E1 to E5 demonstrate the extent of PPO Negotiations' commitment and financial contributions dedicated to promoting the MDA endorsement. We are fully committed to covering all marketing expenses associated with promoting our services and the MDA endorsement. We are dedicated to maintaining a strong partnership with the MDA and are committed to delivering value without minimal cost burden on MDA Services

F. Royalty

1. Revenue Structure for MDA Endorsement:
[Describe the envisioned revenue structure as compensation for MDA endorsement]

Refer to chart 2.1 for details

2. Compensation for Existing MDA Members:
Would the MDA be compensated for existing members currently using your services?

N/A at this time