



Membership Plans

Software to design and run an in-house subscription plan — enrollment, billing, plan design, and patient marketing.

VENDOR	DEMO DATE	WHO YOU SPOKE WITH
<input type="text"/>	<input type="text"/>	<input type="text"/>

WHAT TO ASK ON A DEMO

TICK WHAT THEY SAY · NOTE · N/A

<p>01 How does the software connect to your PMS, and what does it write back?</p> <p>Full two-way sync eliminates double-entry and keeps billing accurate.</p> <p> <input type="checkbox"/> Two-way sync <input type="checkbox"/> Read-only sync <input type="checkbox"/> Standalone </p>	<p>Doesn't apply <input type="checkbox"/></p> <p>NOTES</p> <input type="text"/>
<p>02 What is the total cost structure — does the vendor take a cut of revenue?</p> <p>Revenue-share models cost far more at scale and are often obscured in demos.</p> <p> <input type="checkbox"/> Flat monthly <input type="checkbox"/> Per-member fee <input type="checkbox"/> Revenue share <input type="checkbox"/> Hybrid </p>	<p>Doesn't apply <input type="checkbox"/></p> <p>NOTES</p> <input type="text"/> <input type="text"/>
<p>03 What are the contract terms, and what happens to your members if you leave?</p> <p>You must own your member list and be able to export it if you switch vendors.</p> <p> <input type="checkbox"/> Month-to-month <input type="checkbox"/> Annual <input type="checkbox"/> Multi-year lock-in </p>	<p>Doesn't apply <input type="checkbox"/></p> <p>NOTES</p> <input type="text"/>
<p>04 How does it handle recurring billing, failed payments, and card updates?</p> <p>Auto-retry and account updater services prevent churn without consuming staff time.</p> <p> <input type="checkbox"/> Auto-retry + dunning + updater <input type="checkbox"/> Auto-retry only <input type="checkbox"/> Manual follow-up </p>	<p>Doesn't apply <input type="checkbox"/></p> <p>NOTES</p> <input type="text"/>

05 **How flexible is plan design — tiers, family plans, perio, custom fees?**

Doesn't apply

Custom tiers and your own fee schedule are proven levers for higher enrollment.

- Unlimited custom tiers
- Limited templates
- Single template

NOTES

06 **How does the vendor address compliance and state regulation risk?**

Doesn't apply

Some states regulate discount plans and require registration — a disqualifying gap.

- Full DMPO/TPA support
- Guidance only
- No compliance help

NOTES

07 **What patient-facing marketing tools are included — can it flag uninsured patients?**

Doesn't apply

Combining a branded page with PMS uninsured-patient identification drives early enrollment.

- Landing page + PMS flag + outreach
- Landing page only
- No marketing tools

NOTES

08 **What does support look like when a member charge fails on a Monday morning?**

Doesn't apply

Time-sensitive billing issues need same-day resolution to protect patient experience.

- Dedicated CSM + phone
- Shared team + phone
- Email only

NOTES

09 **How long does setup take, and what does onboarding require from your team?**

Doesn't apply

Time-to-first-enrolled-member is the most concrete proxy for onboarding quality.

- 1–2 weeks
- 3–6 weeks
- 6+ weeks

NOTES

10 **Can they provide a reference and share member-retention data from similar practices?**

Doesn't apply

Aggregate churn benchmarks confirm whether the plan math actually works at your scale.

- References + benchmarks
- References, limited data
- None provided

NOTES

YOU'VE EXPLORED 1 OF 24 CATEGORIES

Imagine the rest of your practice running this clearly.

You sized up one category today. The other 23 — staffing, no-shows, insurance, slow collections — are already sorted, each vendor **classified by the problem it solves.**

EVERY PROBLEM IN YOUR PRACTICE, ALREADY SORTED

Clinical AI	Imaging	Practice Mgmt	Patient Comms	Insurance	Revenue Cycle
Payments	Membership	Credentialing	Scheduling	Marketing	Analytics
AI Scribe	Teledentistry	Phone / VoIP	Virtual Assts	Staffing	HR & Training
Treatment Plan	Engagement	Supplies	Lab	Hardware	Compliance

500+ vendors · sorted by the problem, vetted by our editors



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Get the next call right the first time.

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