

ALLIED DENTAL PRACTICES OF NJ, LLC 2016 YEAR-END SUMMARY

Prepared on 12/9/16



Consulting for Non-Profit & Health Care Organizations

TOUCH POINT IS A DIVISION OF AD&CC, INC. A PRIVATE 501(C3) NON-PROFIT ORGANIZATION

www.TouchPointConsulting.org

SELECTED SERVICES CONTRACTED BY ALLIED DENTAL

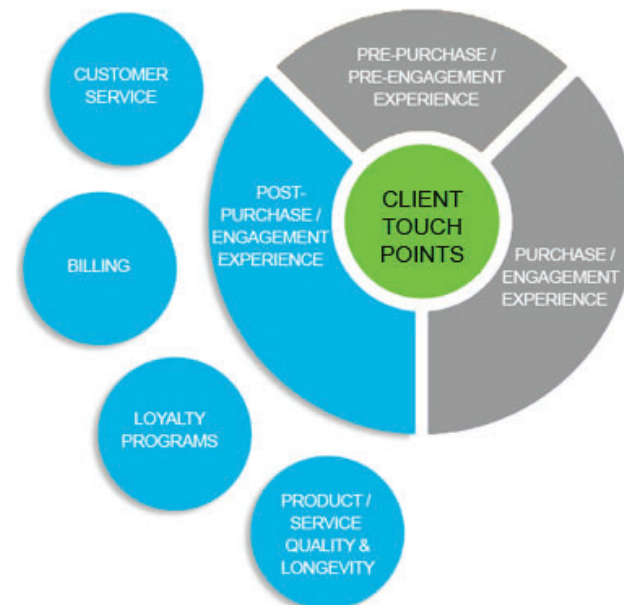
PRE-ENGAGEMENT EXPERIENCE



ENGAGEMENT EXPERIENCE



POST-ENGAGEMENT EXPERIENCE



MARKETING & ADVERTISING

- Industry Insight Snapshot & Competitive Intel. Reports
- Business Copywriting & Brand Repositioning
- Design Refresh of Patient Facing & Corporate Collateral
- Development of National & Local Marketing Campaigns
- Quarterly Strategic Marketing Plans & Advertising Budget
- Overall Product, Service & Brand Awareness Evaluations
- Universal Theme & Messaging Consistency
- Radio, TV Commercial & Outdoor Ad Development
- Design Refresh & Development of Online Content
- Organic SEO Strategies
- Email Blast/Social Media Set Up & Weekly Management
- Online Campaign & Direct Mail Campaigns Development
- Business to Business Marketing & Relationship Building
- Segmented & Cross Media Marketing Tactics

PATIENT EXPERIENCE

- Patient Environment Experience Creation
- POS Display Design
- Signs, Banners & Tradeshow Element Design
- Patient Traffic Flow
- Patient/Staff Interaction Communication & Profiling
- Patient Retention Program Creation & Reporting
- Multi-media Presentations and Staff Training Tools
- Patient Service Performance Evaluations & Reporting
- Follow-Up Customer Service Program Development
- Product/Service Quality & Longevity Evaluations
- Loyalty Program Development for Professional Referrals
- Loyalty Program Development for Patient Referrals
- Ease of Product, Service & Event Access by Customers
- Billing Processes & Efficiencies Evaluations

OPERATIONS & DATA MANAGEMENT

- Cost Savings Analysis
- ROI of Channels and Vehicles for Brand Awareness
- Sales/RM/OM Team Effectiveness Evaluations
- Product/Service Performance Evaluations & Reporting
- Gift Card Program & Operating System Creation
- Response Tracking System Evaluation & Development
- Workflow Process Efficiencies
- Sales Verticals Evaluations & Strategic Planning
- Identify New Product Development Needs
- Online Ordering & Collateral Management
- Vendor Coordination & Procurement
- Employee Training Tools
- Employee Roles Responsibility Efficiency Evaluations
- R&D for New Product Development & Market Placement

OVERVIEW OF CONTRACTED MARKETING COMMUNICATION SERVICES

Touch Point is a fully insured division of AD&CC, Inc. a 501(C3) organization that assists non-profit and healthcare organizations with their business development. Touch Point has been providing marketing/communications agency services for Allied Dental since 2012 under the direction of Lisa Romero Brockway, COO. Support services have been managed by Candice Huddy, Executive Director.

The hourly rate for all marketing communications services selected in the grid on the previous page are billed at the **negotiated rate of \$65 per hour** from the regular rate of \$195 per hour.

Hours Contracted: 2,220

- **Contract Period:** 1/1/2016-12/31/16: **40 hours per week**
(Additional 10 hours per week approved from October 2016 - December 2016 dedicated to new Amara Dental office openings)
- **Actual Hours Worked:** 1/1/2016-12/31/16: **3,211**
(Savings noted on the summary page)
- **Actual Hours Billed:** 1/1/2016-12/31/16: **2,220**

Task/Time Allotment Break Out of Actual Hours Worked: 3,211

The above hours are required to handle and maintain the current workload. Touch Point is in the position to increase workload to support Allied Dental staff members as the company footprint continues to expand.

- **1384 files** designed produced and edited = **1,921 hours**
- **978 print files** prepared for wholesale print, ordered and processed = **524 hours**
- **270 Internet pages programmed, 1,000+ white paper documents** linked, content updates and maintenance = **198 hours**
- Allied Dental's ASC team, office staff and vendor communication = **521 hours**
- Travel to ASC offsite meetings, offices and vendors = **47 hours**

WORK ENGAGEMENT OVERVIEW

The Allied Dental executive team: sets and leads the brand strategy, develops and adapts the overall company strategic planning initiatives, ensures that the Dental brands services and offerings are suitably marketed, and that new products and new approaches are developed to advance the company's strategic and financial objectives. Lisa Romero Brockway, COO retains sole strategic vision for the organization, develops and aligns operational plans, determines the annual budget and defines/allocates the budget per office location. Touch Point team members are included in weekly discussions outlining the company's performance and are invited to make marketing, communications and advertising tactic suggestions. All review and final approvals for marketing plans, suggested tools and tactics, marketing and advertising budgets and budget management is solely handled by Lisa Romero Brockway, COO.

Campaign Tracking & Management Metrics:

All campaign tracking activities, results, and success metrics have been designed and continuously monitored by Allied Dental. These metrics are reviewed with Touch Point team members on a weekly basis. At such time, Touch Point may recommend adjustments and revisions to marketing tactics. These recommended adjustments are then taken under consideration and final approval is provided by Lisa Romero Brockway, COO.

Touch Point serves as the marketing communications arm, dedicated to providing all: print production, intranet programming/maintenance, corporate communications, field marketing communications, brand identity, creative design, competitive intelligence, media buying, wholesale print bookings, and campaign development for the following brands.

32 Brands Managed:

- | | | |
|----------------------|--|--------------------------|
| - Dental Specialties | - ASC (Allied Dental's Patient Support Center) | - Amara Dental |
| - Sunny Smiles | - South Plainfield Dental Group | - Parsippany Dental Care |
| - Liberty Dental | - Family Offices (26 Individually Branded) | |

35 Offices Supplied with Marketing Communications:

- | | | |
|--------------------------------------|---------------------------------|--|
| - ASC | - Amara Dental Brick | - Amara Dental Cherry Hill |
| - Amara Dental Howell | - Amara Dental Toms River | - Amara Dental Wall |
| - Amara Dental Mahwah (Sunny Smiles) | - Amara Dental Parsippany (PDC) | - Amara Dental (South Plainfield Dental Group) |
| - Absecon Family Dental | - Aberdeen Family Dental | - Aldan Family Dental |
| - Allied of Old Bridge | - Bartonville Family Dental | - Bethlehem Family Dental |
| - Cape May Family Dental | - Cherry Hill Family Dental | - Cross Keys Family Dental |
| - Dental Specialties | - Deptford Family Dental | - Easton (25 th Street) Dental |
| - Egg Harbor Family Dental | - Family Dental of Allentown | - Hazlet Family Dental |
| - Howell Family Dental | - Hunterdon Family Dental | - Lakewood Family Dental |
| - Little Falls Family Dental | - Manahawkin Family Dental | - Millville Family Dental |
| - Parsippany Family Dental | - Phillipsbug Family Dental | - Piscataway Family Dental |
| - Shore Family Dental | - Willingboro Family Dental | |

MARKETING COMMUNICATIONS PATIENT FACING PROJECTS

Below are patient facing project samples planned, designed, produced, edited, executed and managed for: ASC, (8) Amara Dental Offices, (26) Family Offices, the Liberty Dental brand, affiliate office brands, multi-office ortho program and Dental Specialties.



No Dental Insurance? No Problem!

The Liberty Program of America

The affordable dental coverage plan you can smile about!

You'll wonder why you didn't join sooner!

Your membership covers routine dental care **plus** cosmetic dentistry, teeth straightening, preventative care, and dental implants. Our program has...

- \$ NO PRE-EXISTING CONDITION CLAUSES
- \$ NO DEDUCTIBLES
- \$ NO AGE LIMITS
- \$ NO CLAIM FORMS
- \$ NO WAITING PERIODS
- \$ NO ANNUAL MAXIMUMS

Join the Liberty Program of America & Save 40-60% on ALL Dental Work TODAY with NO Limitations!

CALL: 844.605.8414

The Liberty Dental Program is designed for people who don't have dental insurance or would like to supplement their existing dental insurance for an even greater savings!

Enrollment is offered FREE OF CHARGE* for the first year for NEW patients ONLY!

TEMPORARY DENTAL SAVINGS CARD

Start Saving on Your Dental Care Right Now!

The Liberty Program of America

The affordable dental coverage plan you can smile about!

Name: _____ ID#: _____

When you enroll in the Liberty Program of America, we'll provide you with your member ID over the phone instantly! Write your name and ID number and use this card until your permanent card comes in the mail.

Questions? Call: 844.605.8414

TAKING CARE OF YOUR ENTIRE FAMILY'S DENTAL NEEDS!

We're Your Total Dental Solution!

Emergency Walk-In Appointments for:

- Loose Teeth, Tooth Pain & Sports Injuries
- Full Reconstruction
- Cosmetic Dentistry
- Porcelain Veneers
- Periodontal Therapy
- Bridges & Crowns
- Dental Implants
- Routine Cleanings
- Dentures
- Straightening
- Medic-Free Porcelain

Call to Schedule Your Appointment Today! 732.553.5473

We Accept: Cigna, Delta Dental, MetLife, Aetna, The Liberty Program of America, Most Insurance & Local Area Plans. We Also Accept Most Dental Discount Plans.

NEW PATIENT OFFER

No Dental Insurance? No Problem!

Our special offer includes:

- Full Mouth X-Rays
- Cleaning & Polishing
- Oral Cancer Screening
- Fluoride Treatment
- Oral Health Exam
- Cosmetic Consultation

Only \$69!

*This \$69.00 is valid for new patients only. It includes a full dental exam, X-rays, cleaning, and fluoride treatment. It is not valid for emergency services, orthodontics, or any other dental procedure. A \$25.00 administrative fee is required at the time of service. The offer is valid for 12 months from the date of enrollment. See us today to learn more!

Allied Dental of Old Bridge

1012 U.S. Route 9
Parlin, NJ 08859

Weekend & Evening Appointments Available!
Call: 732.553.5473

Visit Us Online! AlliedDentalOldBridge.com

Counter Cards & Statement Stuffers

Aldan Family Dental

Providence Village Shopping Plaza
523 North Oak Avenue
Aldan, PA 19018

Schedule Your Appointment Today!
Call: 610.259.1100

Weekend Appointments & Financing Available

NEW YEAR - NEW YOU

ORAL HEALTH SCREENING & CLEANING!

Perfect for patients without dental insurance. Includes:

- Full Mouth X-Rays
- Cleaning & Polishing
- Oral Cancer Screening
- Fluoride Treatment
- Cosmetic Consultation

Only \$79

Your Total Dental Solution!

Emergency Walk-In Appointments for:

- Loose Teeth, Tooth Pain & Sports Injuries
- Full Reconstruction
- Cosmetic Dentistry
- Porcelain Veneers
- Periodontal Therapy
- Medic-Free Porcelain
- Dental Implants
- Routine Cleanings
- Dentures
- Crown & Bridges
- Smile Implants

Have Dental Coverage? Call Us Today!

Aldan Family Dental

Providence Village Shopping Plaza
523 North Oak Avenue
Aldan, PA 19018

Schedule Your Appointment Today!
Call: 610.259.1100

Weekend Appointments & Financing Available

LOVE YOUR SMILE!

IN-OFFICE INSTANT TEETH WHITENING FOR YOU & A GUEST!

Final amount of \$399 each for 2 people. **Only \$399**

*Appointments must be booked on the same day.

Your Total Dental Solution!

Emergency Walk-In Appointments for:

- Loose Teeth, Tooth Pain & Sports Injuries
- Full Reconstruction
- Cosmetic Dentistry
- Porcelain Veneers
- Periodontal Therapy
- Medic-Free Porcelain
- Dental Implants
- Routine Cleanings
- Dentures
- Crown & Bridges
- Smile Implants

Have Dental Coverage? Call Us Today!

Aldan Family Dental

Providence Village Shopping Plaza
523 North Oak Avenue
Aldan, PA 19018

Schedule Your Appointment Today!
Call: 610.259.1100

Weekend Appointments & Financing Available

PICTURE PERFECT SMILES!

SPRING BRIDAL PARTY WHITENING FOR FOUR PEOPLE OR MORE!

Amount of \$199 each for 4+ people. **Only \$199**

*Appointments must be booked on the same day.

Your Total Dental Solution!

Emergency Walk-In Appointments for:

- Loose Teeth, Tooth Pain & Sports Injuries
- Full Reconstruction
- Cosmetic Dentistry
- Porcelain Veneers
- Periodontal Therapy
- Medic-Free Porcelain
- Dental Implants
- Routine Cleanings
- Dentures
- Crown & Bridges
- Smile Implants

Have Dental Coverage? Call Us Today!

Direct to Home Oversized Post Card Marketing

INTERNAL MARKETING COMMUNICATIONS PROJECTS

Below are internal project samples planned, designed, produced, edited, executed and managed for the staff of the corporate headquarters and field offices.



12 Month Manager's Business Building Calendar

Monthly Company Newsletter



Company Intranet

PATIENT FACING MARKETING CAMPAIGN PROJECTS

Below are project samples planned, designed, produced, edited, executed and managed for Amara Dental new office openings.

Wall, NJ Billboard



Window Advertising

Monmouth County Woman Magazine

Val Pak

Clipper Magazine Back Cover

MARKETING COMMUNICATIONS PROJECT SAMPLES

Projects planned, produced, executed and managed for the headquarters offices and all field offices include but are not limited to the below.

<u>Marketing Tools:</u>	<u>Wholesale Printing:</u>	<u>Corporate Communications:</u>
<ul style="list-style-type: none"> ■ Wellness Wise patient magazine 28 pages ■ Patient recall cards ■ Counter cards ■ Condition sheets ■ Branded office folders ■ Periodontal treatment tear pads ■ Periodontal treatment tear pads in Spanish ■ Pediatric treatment tear pads ■ Brand standards guides developed/created ■ Competitive intelligence reports ■ Demographic reports ■ Visits to competitor offices ■ Strategic corporate alliance letters ■ New doctor announcement letters to patients ■ New doctor announcement direct mail p.c. ■ End of year benefits postcards ■ Office window graphics ■ Outdoor billboard design 	<ul style="list-style-type: none"> ■ Office letterhead ■ Office envelopes ■ Appointment cards ■ Manager business cards ■ Doctor business cards ■ Doctor excuse notes ■ Counter cards ■ Posters ■ A-Frame Signs ■ Banners ■ Note cards ■ Doctor referral tear pads ■ Hygiene Treatment sheets ■ All internal corporate materials 	<ul style="list-style-type: none"> ■ Creation of company intranet 275 pages ■ 1000+ internal white paper documents formatted and linked ■ Quarterly company newsletters 28 pages ■ PowerPoint presentations for internal use and board meetings ■ Office Manager 12 month strategic marketing calendar 24 pages ■ Office Manager meeting presentations ■ Weekly Regional Manager communication ■ Monthly Office Manager communication ■ Recruitment brochure creation ■ Employee perks program sheets

Continued on next page

MARKETING COMMUNICATIONS PROJECT SAMPLES

Projects planned, produced, executed and managed for the headquarters offices and all field offices include but are not limited to the below.

<u>Print Advertising:</u>	<u>Vendor Management:</u>	<u>Digital Advertising:</u>
<p>Vendor negotiations and media buys for:</p> <ul style="list-style-type: none"> ■ Val Pak ■ Clipper ■ Outdoor billboards ■ Local newspapers to offices ■ Local magazines to offices ■ Local news and cable stations ■ Every door direct mail postcards ■ Welcome Wagon 	<p>Continuous vendor communication and management meetings, ongoing communication content and graphic file preparation for 73 vendors including:</p> <ul style="list-style-type: none"> ■ Judge group ■ Idea evolver ■ 1SEO ■ Florida Design Group ■ Mind Share ■ Clipper magazine ■ Val Pak ■ CBS outdoor ■ Monmouth County Woman ■ Pocono Record ■ Delaware Times ■ New Jersey Monthly Magazine, ■ Allegra Print Marketing 	<p>Creation of retargeting ads for the following brands:</p> <ul style="list-style-type: none"> ■ Amara Dental Brick ■ Amara Dental Wall ■ Amara Dental General template ■ Hunterdon G\Family Dental ■ Amara South Plainfield ■ Aberdeen Family Dental ■ 25th Street Easton Family Dental

ANNUAL COST SAVINGS SUMMARY

- **Wholesale Print Savings:** **\$ 81,710.94**
Touch Point is a registered print vendor and accesses wholesale printing rates.
- **Retail Advertising and Print Savings:** **\$ 9,299.47**
Touch Point negotiates rates with vendors and takes no agency mark-up so the cost savings is passed to Allied Dental.
- **Intranet Design, Architecture, Programming and Maintenance Savings:** **\$ 5,940.00**
Standard hourly rates for intranet design, architecture and programming are \$95-\$125 compared to the billed rate of \$65.
- **Sales Tax Savings on Print Marketing:** **\$ 8,536.96**
As a division of AD&CC, Inc. a 501(C3) non-profit organization, Touch Point purchases are sales tax-exempt.
- **Marketing/Communications Management Unbilled Savings:** **\$ 64,415.00**
Unbilled time dedicated to Allied Dental at the negotiated rate of \$65.00 per hour at 991 hours.
- **Agency Marketing/Communications Management Negotiated Rate Savings:** **\$417,430.00**
Allied Dental has a negotiated rate with Touch Point of \$65 per hour for a 12 month contract, reduced from the standard rate of \$195 p/h.

TOTAL 2016 COST SAVINGS*:	\$587,332.27
----------------------------------	---------------------

The above is the total cost savings based on a 12-month contract for marketing communications management and production for 35 offices.

* Estimated totals are based on information supplied from vendors and Allied Dental accounting department.