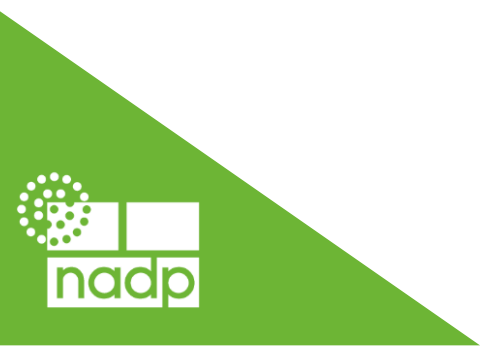




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**Are there any providers left to recruit?**

Aaron Groffman  
September 27, 2017



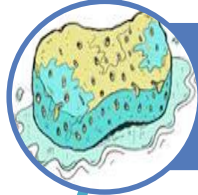
# Discussion Topics



Dental PPO networks continue to grow



How has growth affected network overlap?

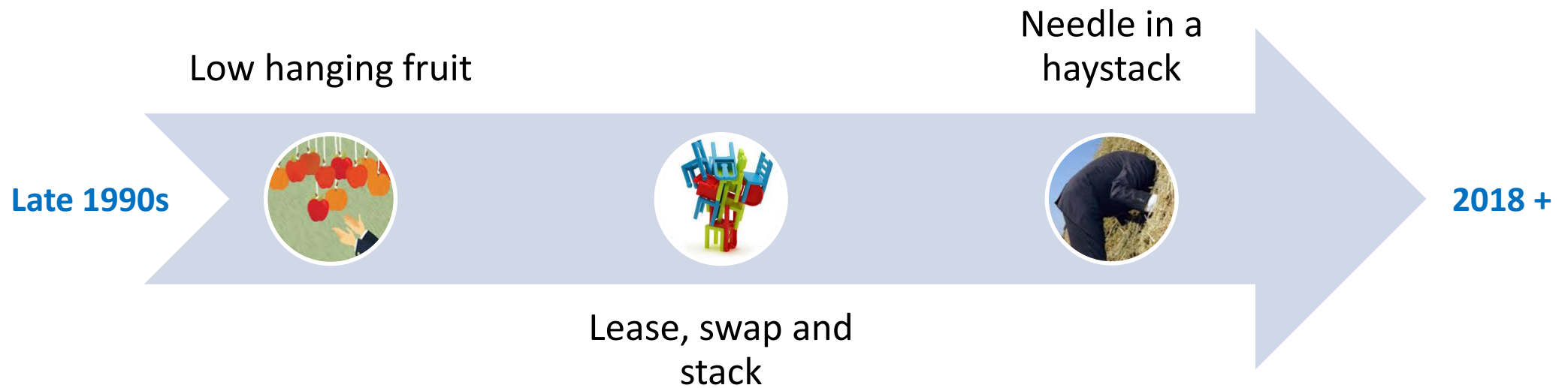


How saturated is the market?



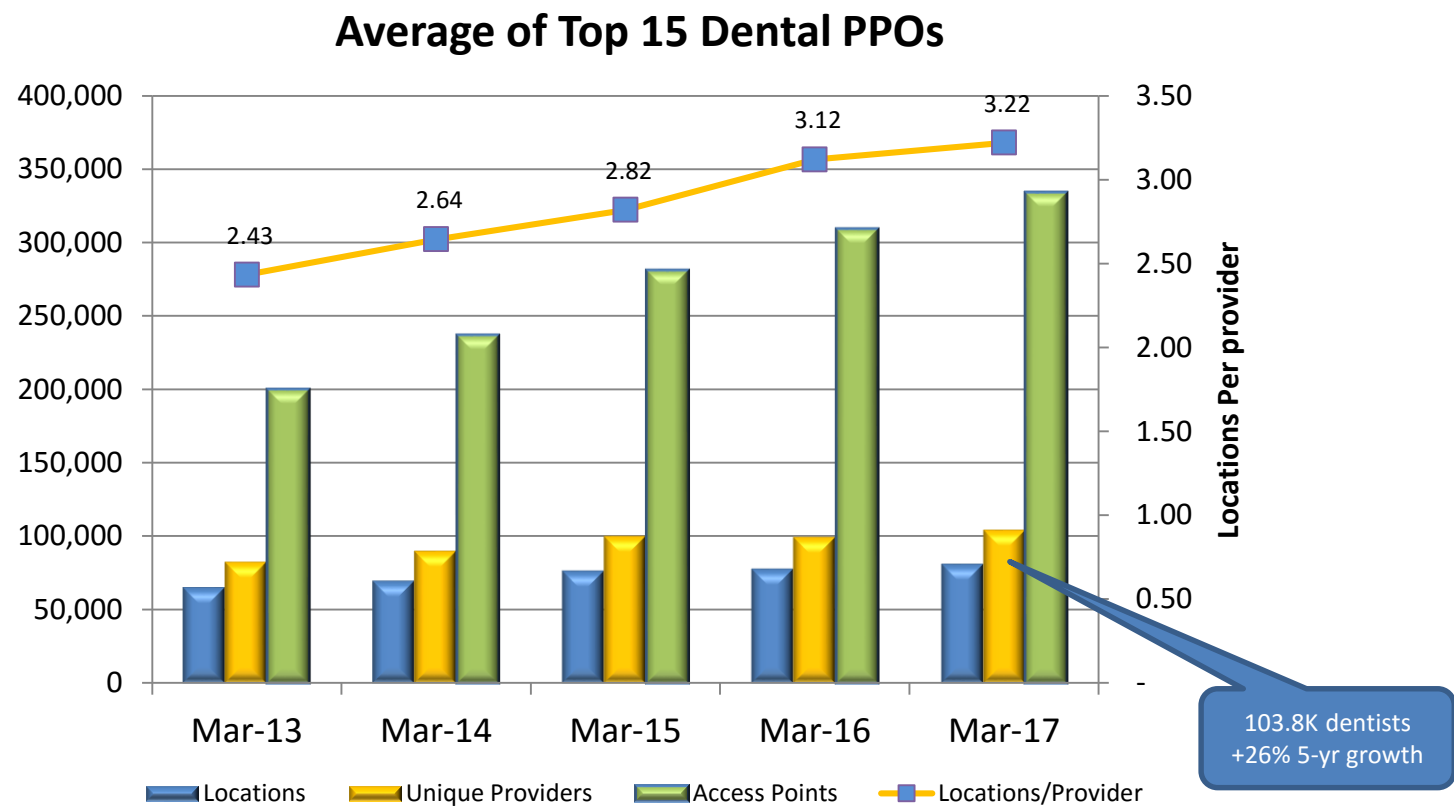
Are there still viable recruitment opportunities?

# PPO network evolution



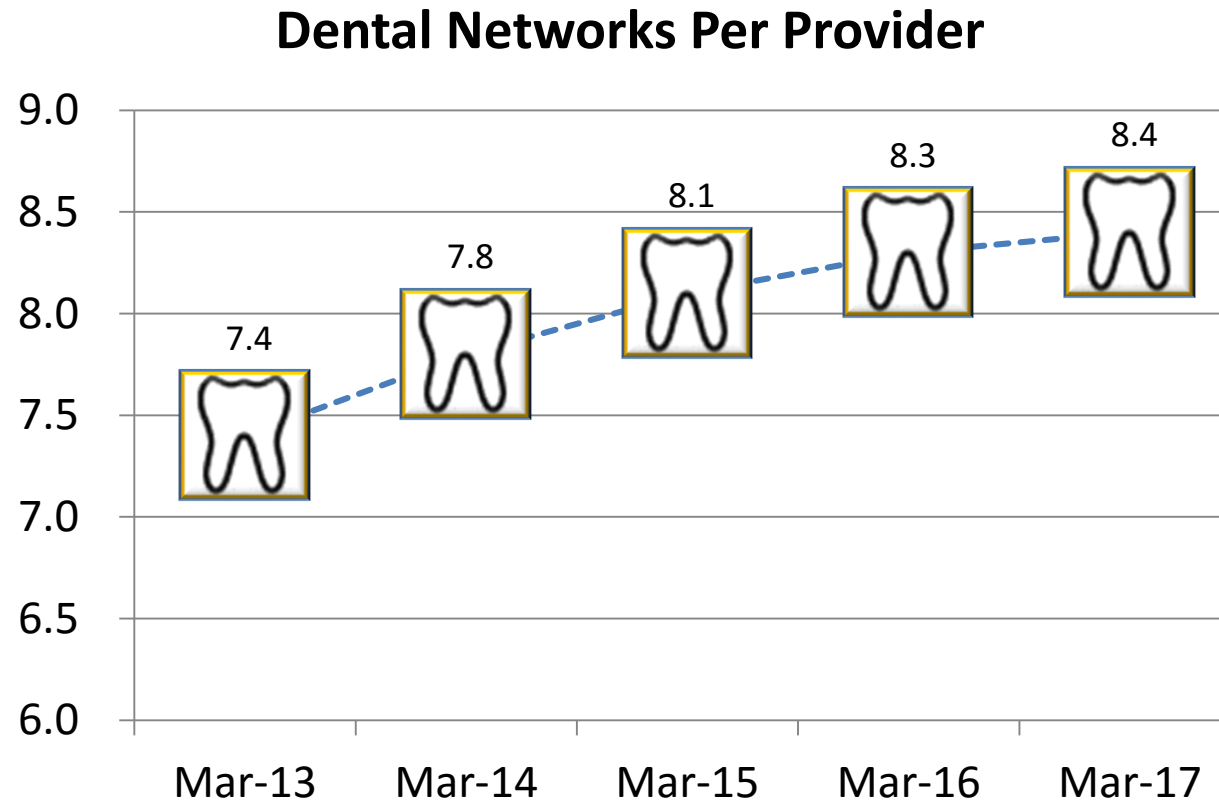
# Network Growth and Overlap

# Dental networks are growing



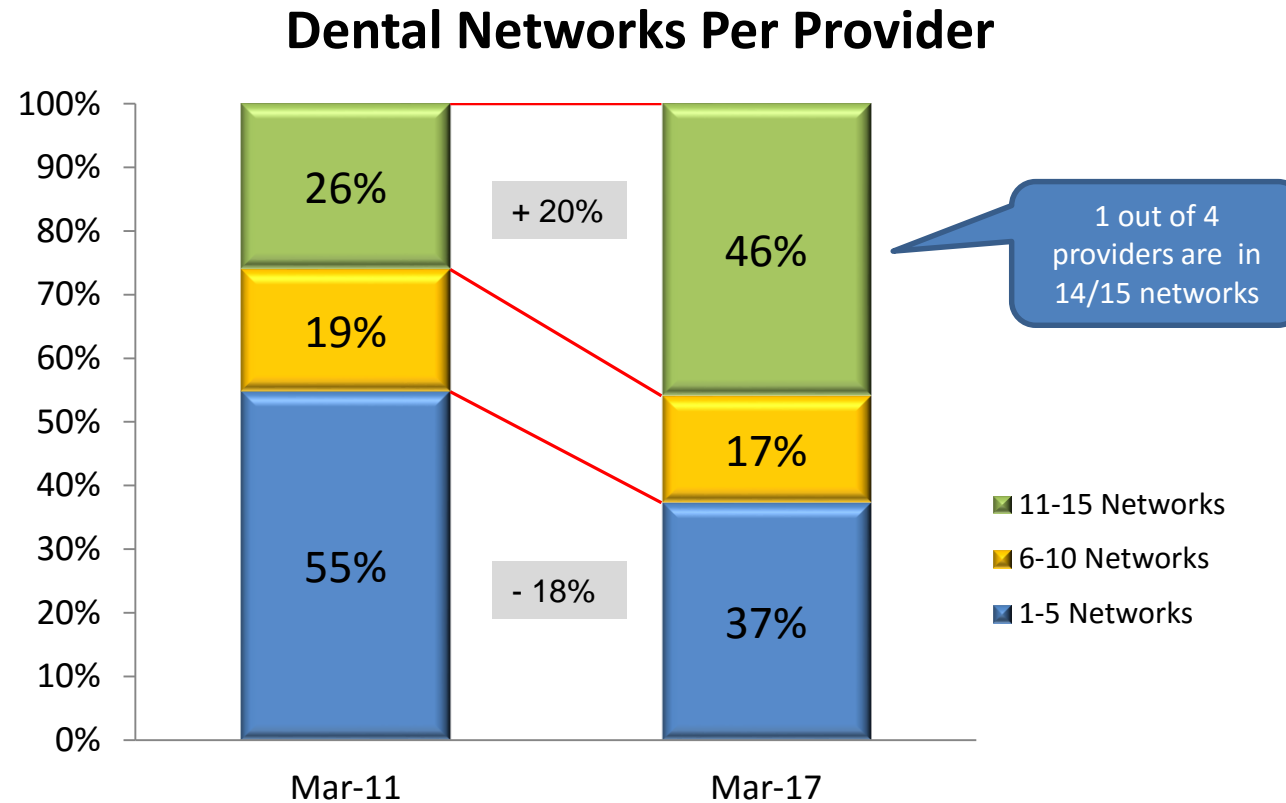
Source: NetMinder, March 2017

# Providers are joining more networks



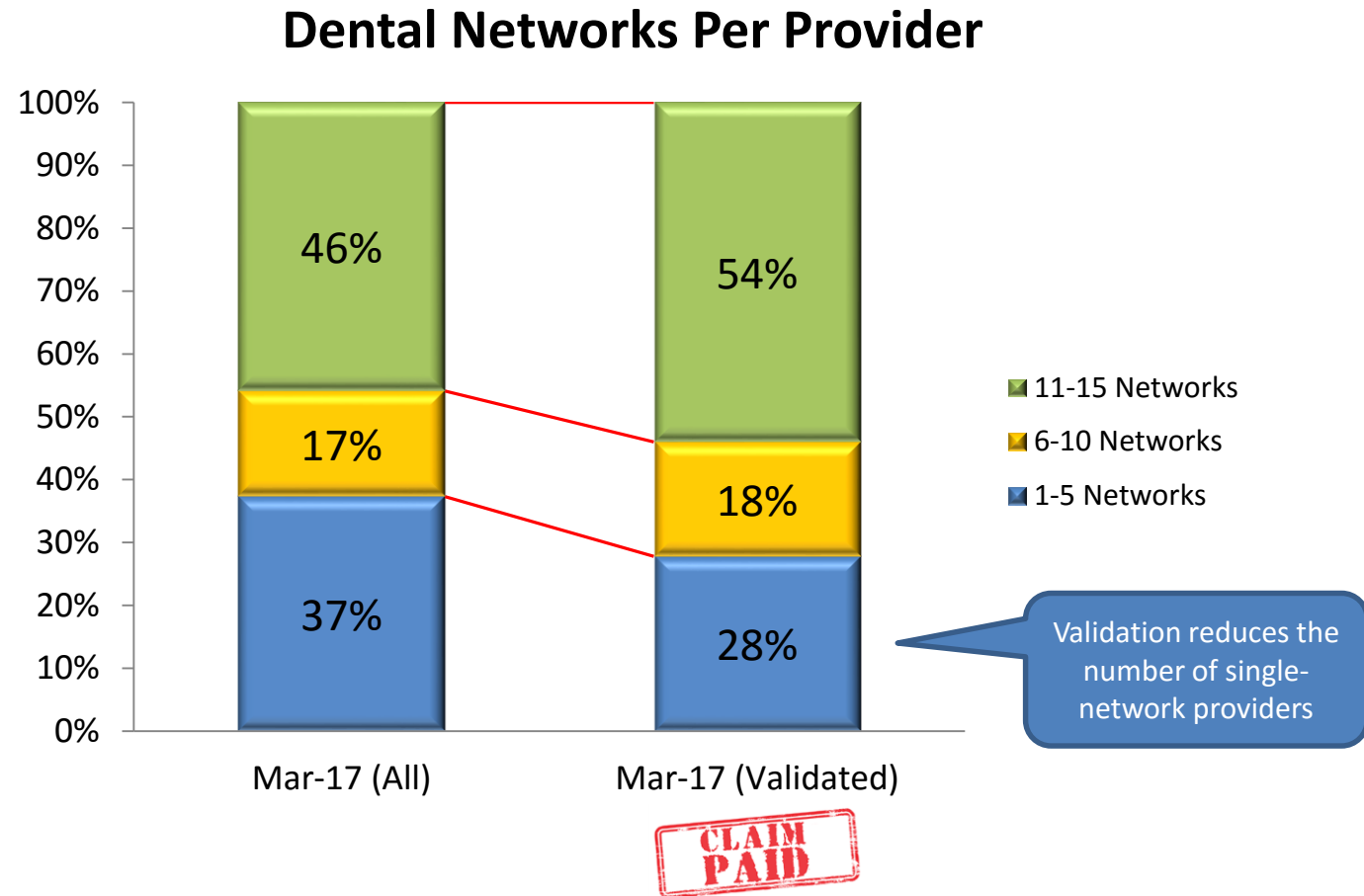
Source: NetMinder, March 2017

# Providers are joining more networks



Source: NetMinder, March 2017

# Providers are joining more networks

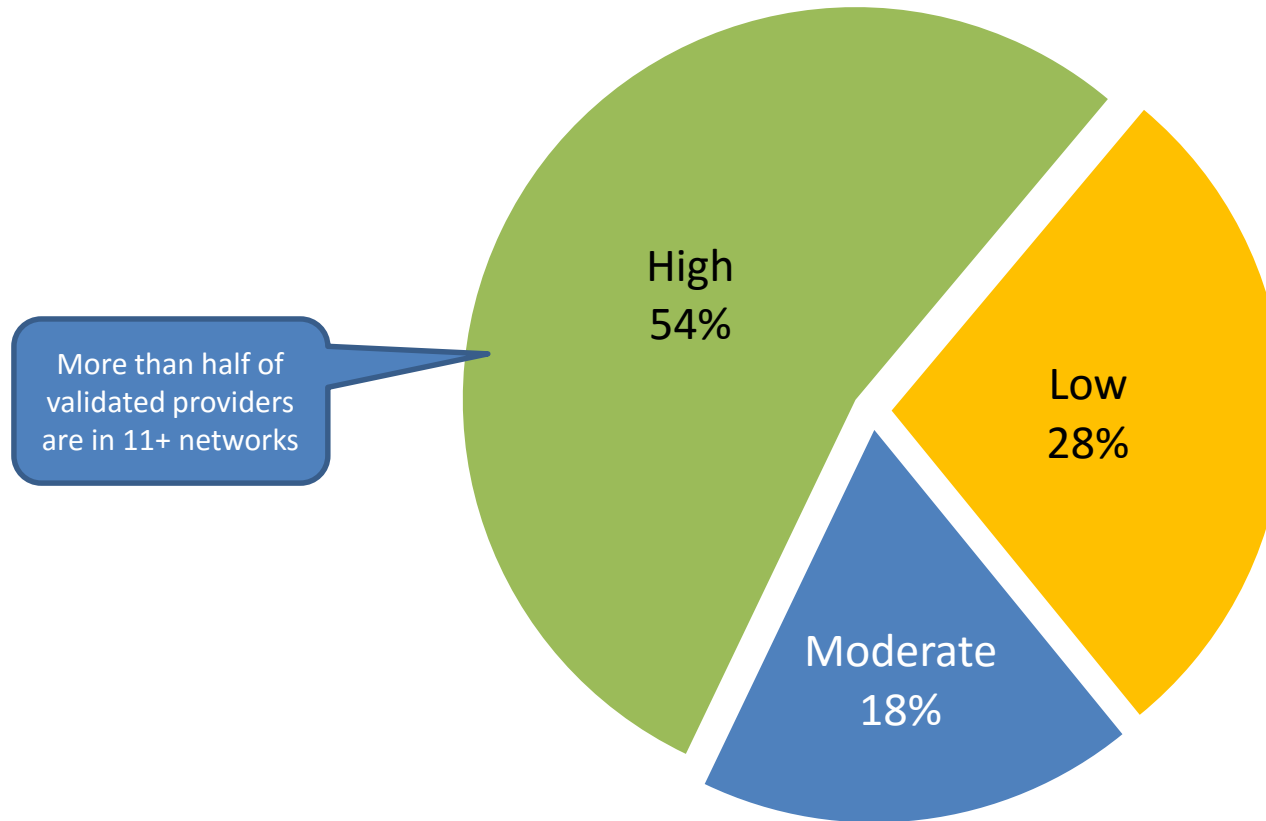


Source: NetMinder, March 2017



# Resulting in high overlap between networks

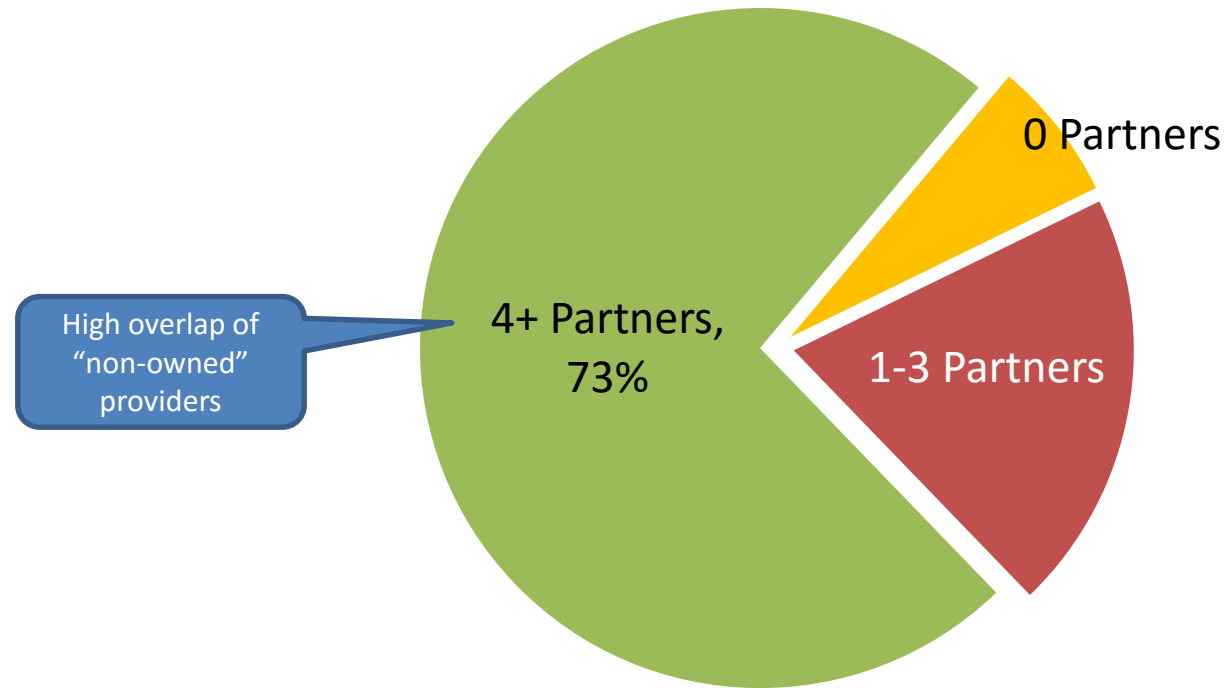
Network Overlap Among Top 15 PPOs



Source: NetMinder, March 2017

# More networks are partnering

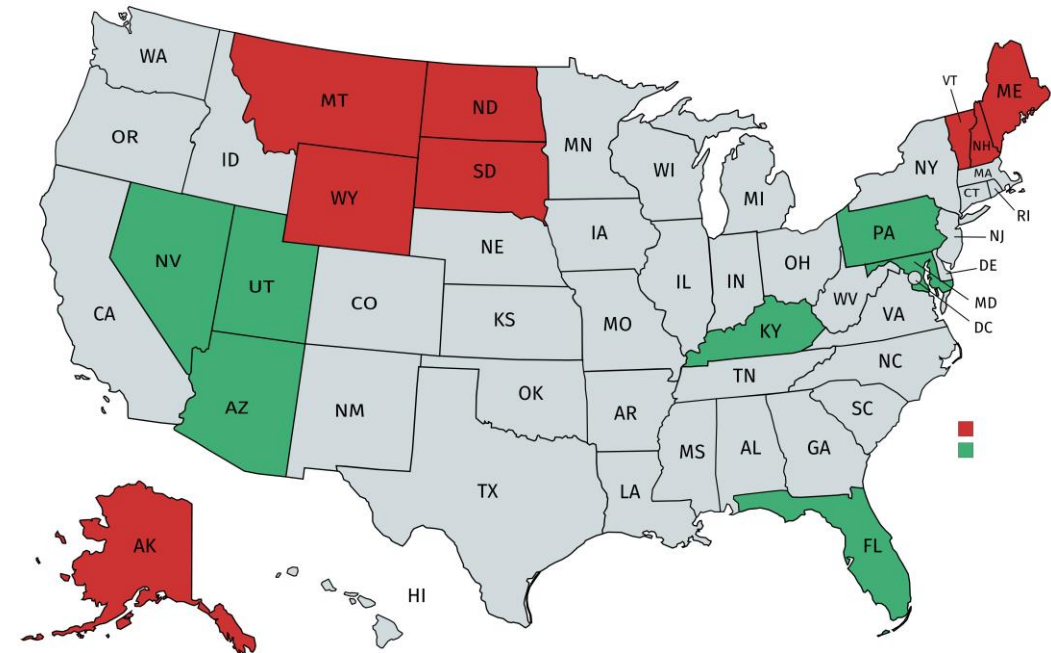
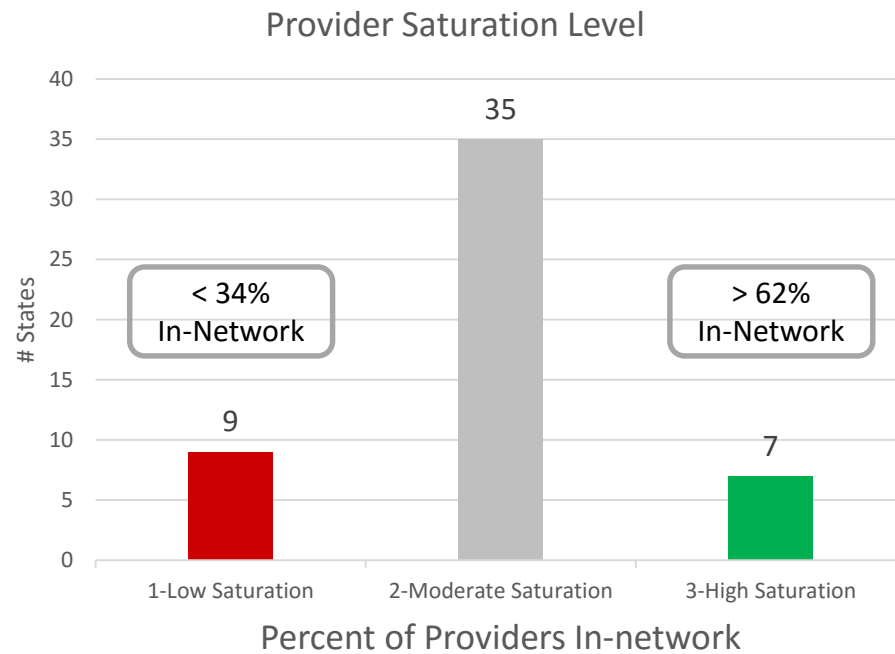
Number of Network Partners



Source: NetMinder, March 2017

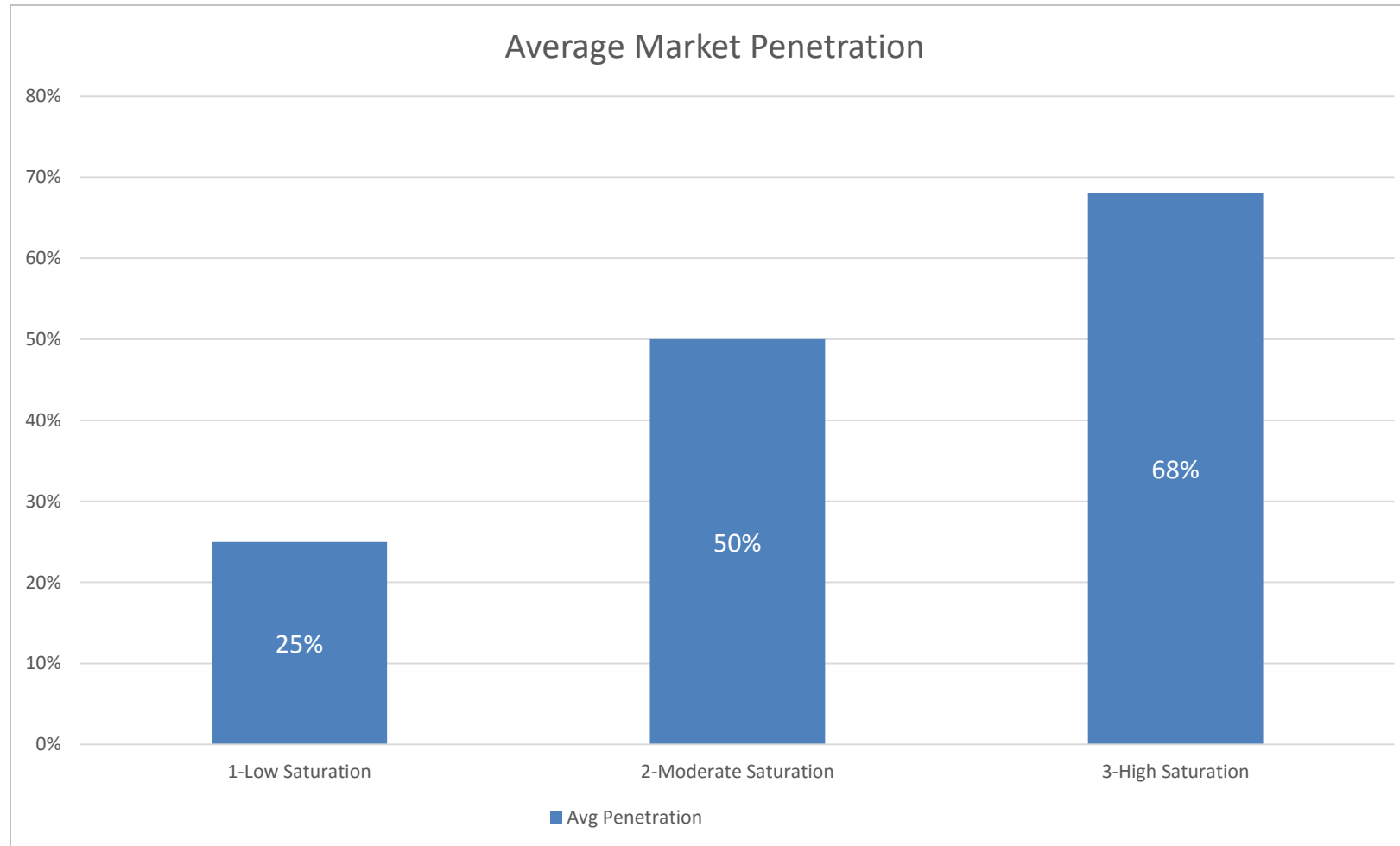
# Market Saturation

# Is the market saturated?



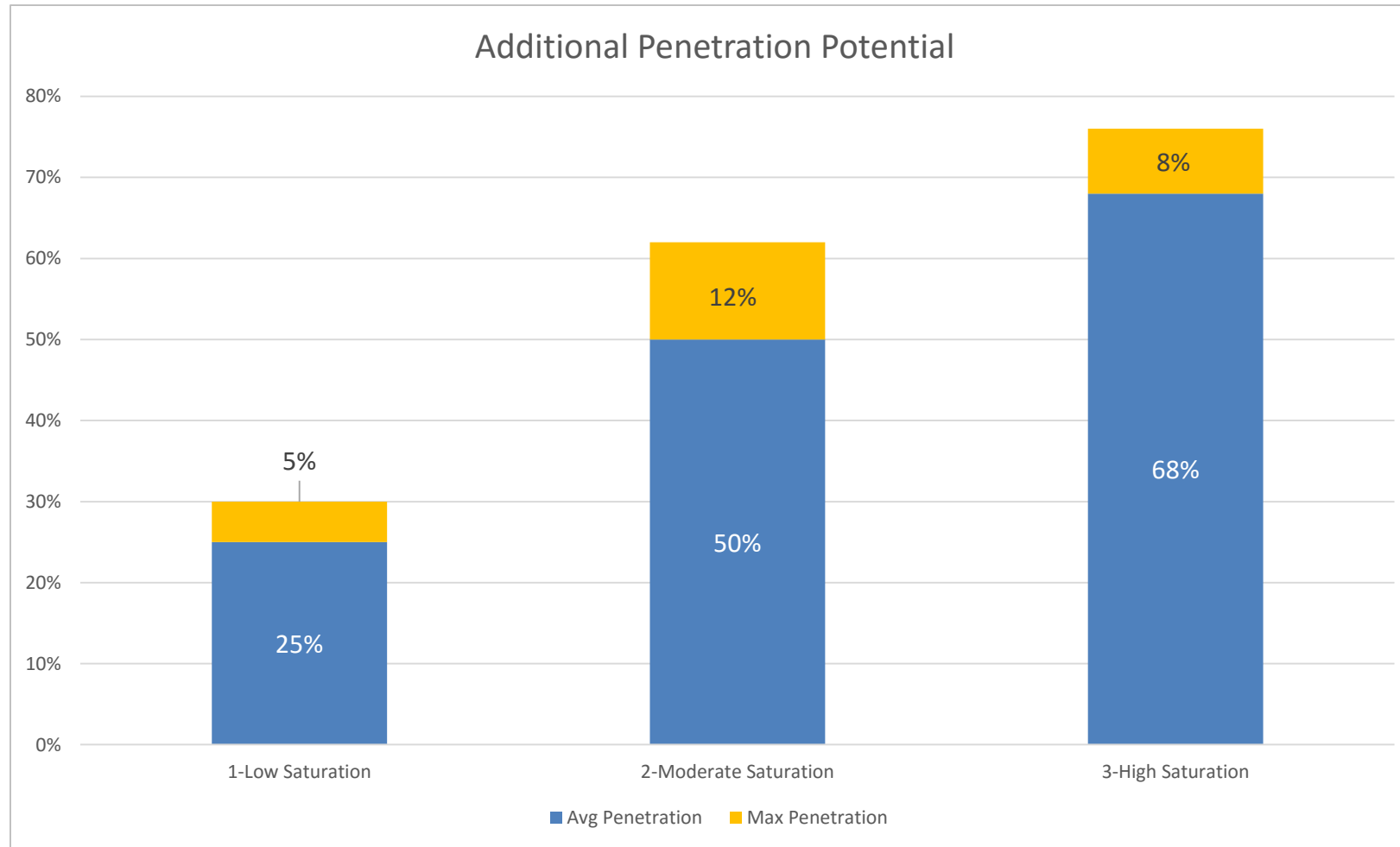
Source: NetMinder, March 2017

# Is the market saturated?



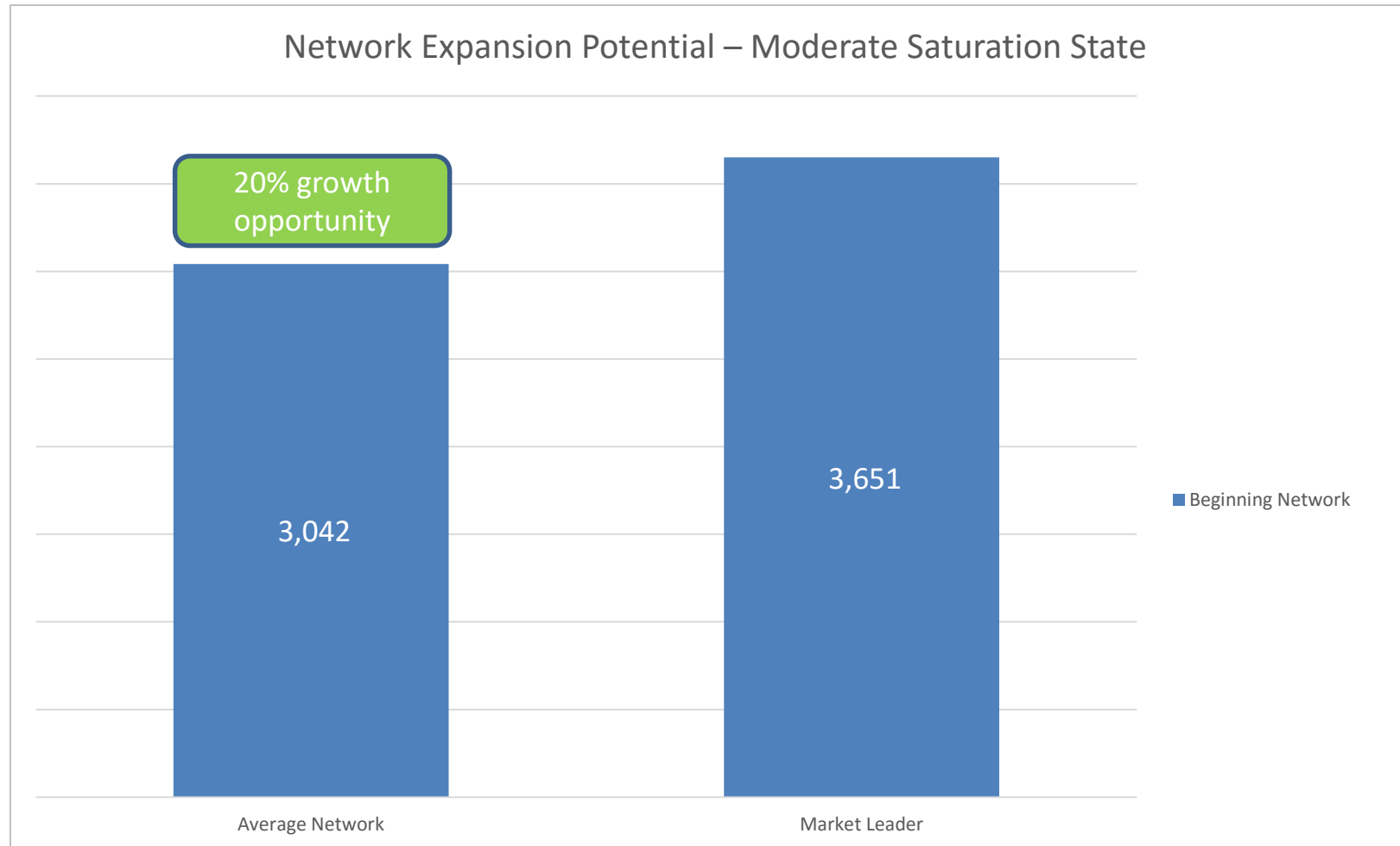
Source: NetMinder, March 2017

# Is the market saturated?



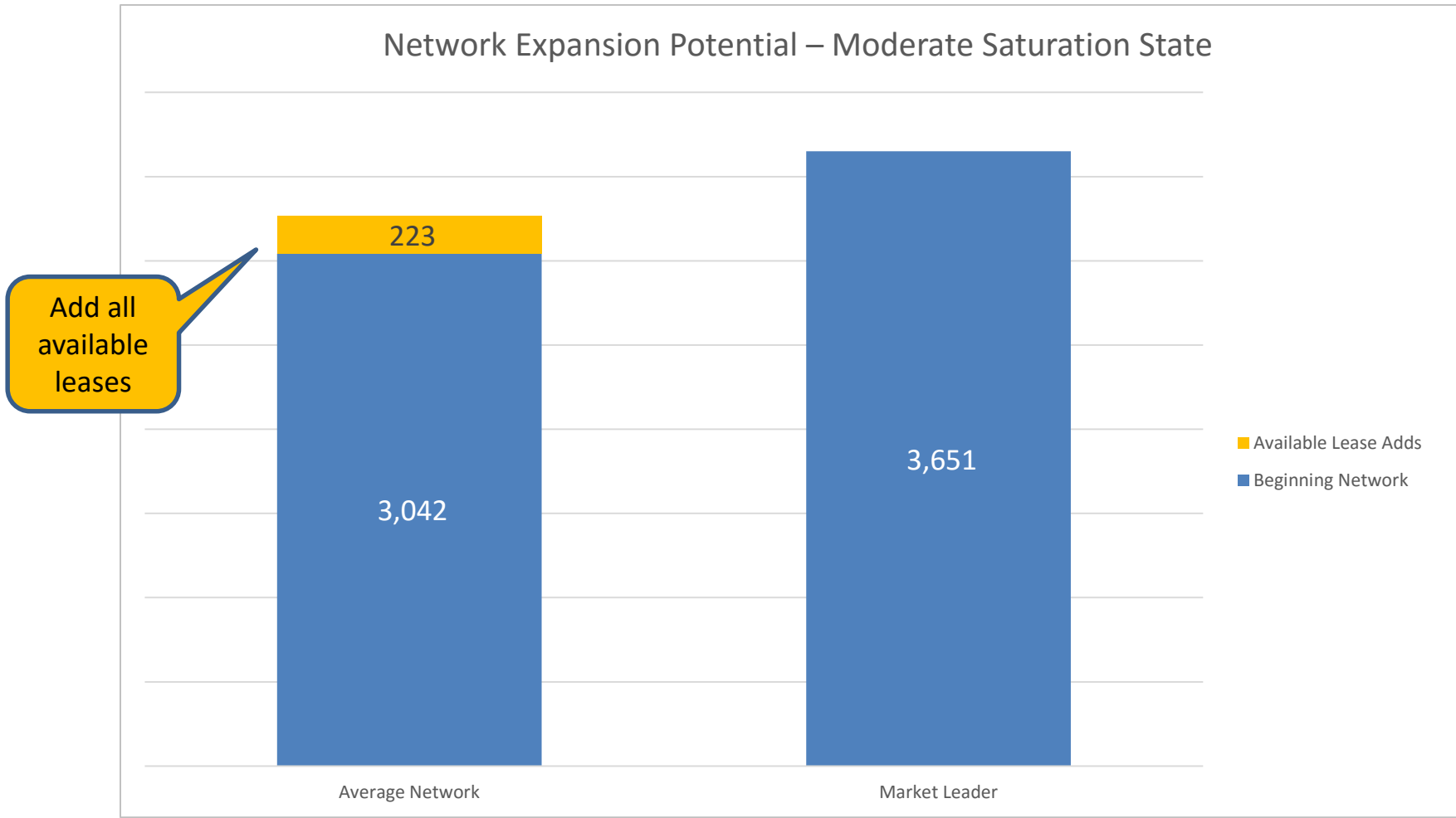
Source: NetMinder, March 2017

# Is the market saturated?



Source: NetMinder, March 2017

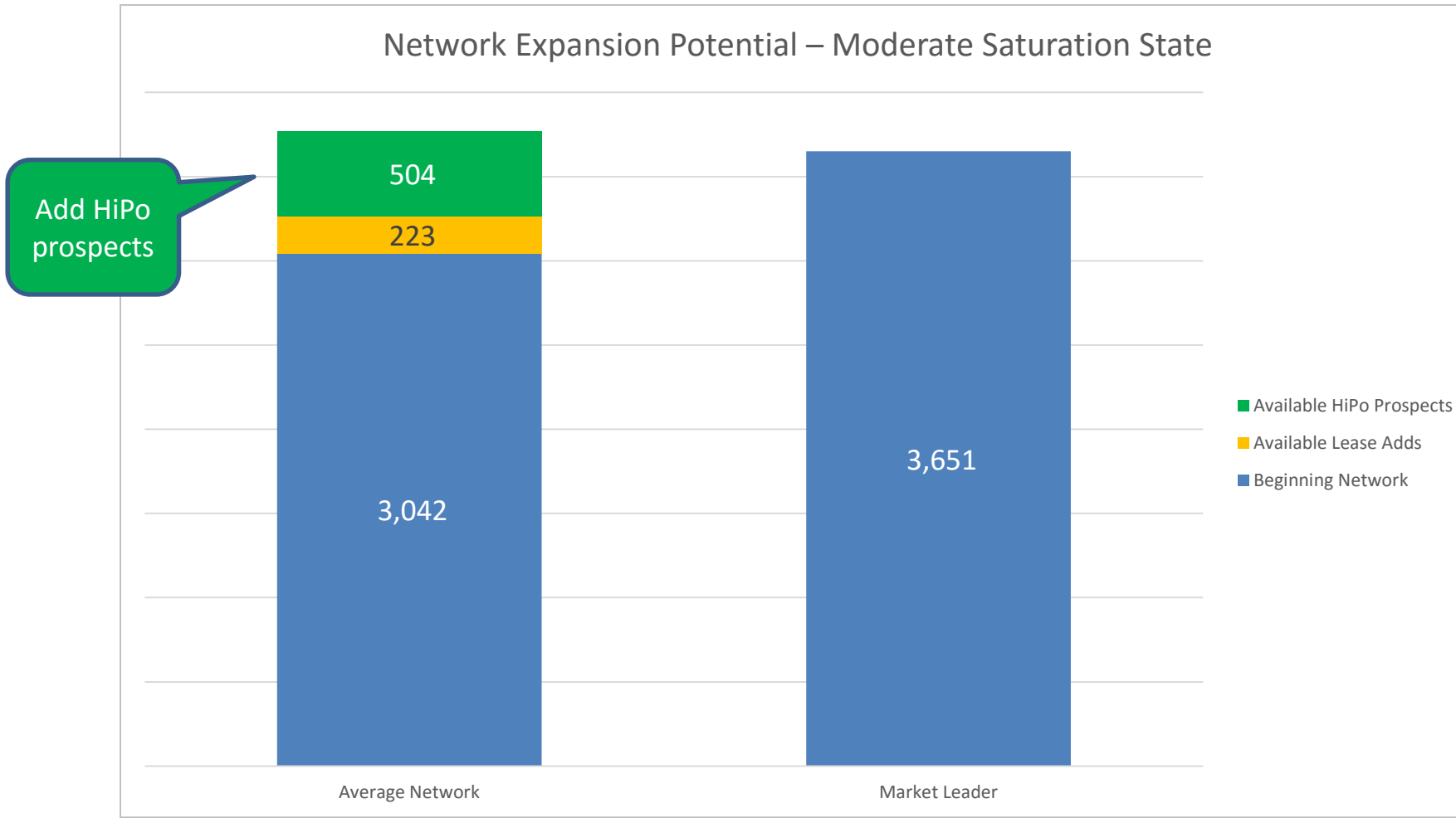
# Is the market saturated?



Source: NetMinder, March 2017



# Is the market saturated?

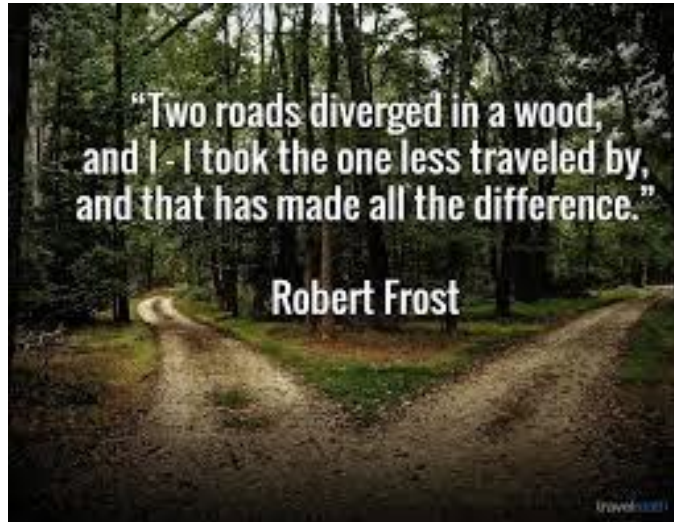


Source: NetMinder, March 2017

# Viablr Recruitment Prospects

# Recruiting strategies

Providers in just a few networks



Providers already in many networks

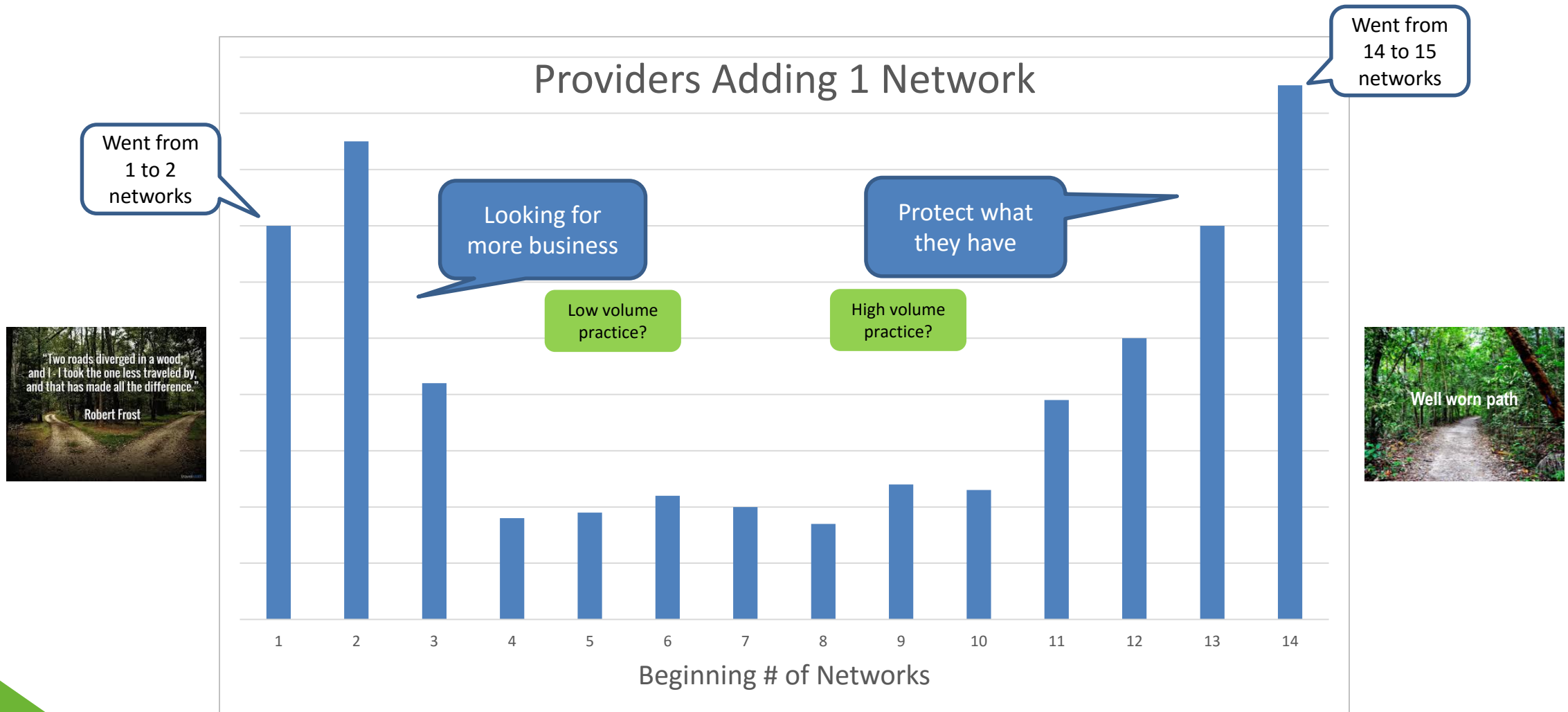


# Road less traveled or well worn path?

## Methodology

- Isolate providers who added 1 network
- Control for lease networks
- Identify their starting # of networks

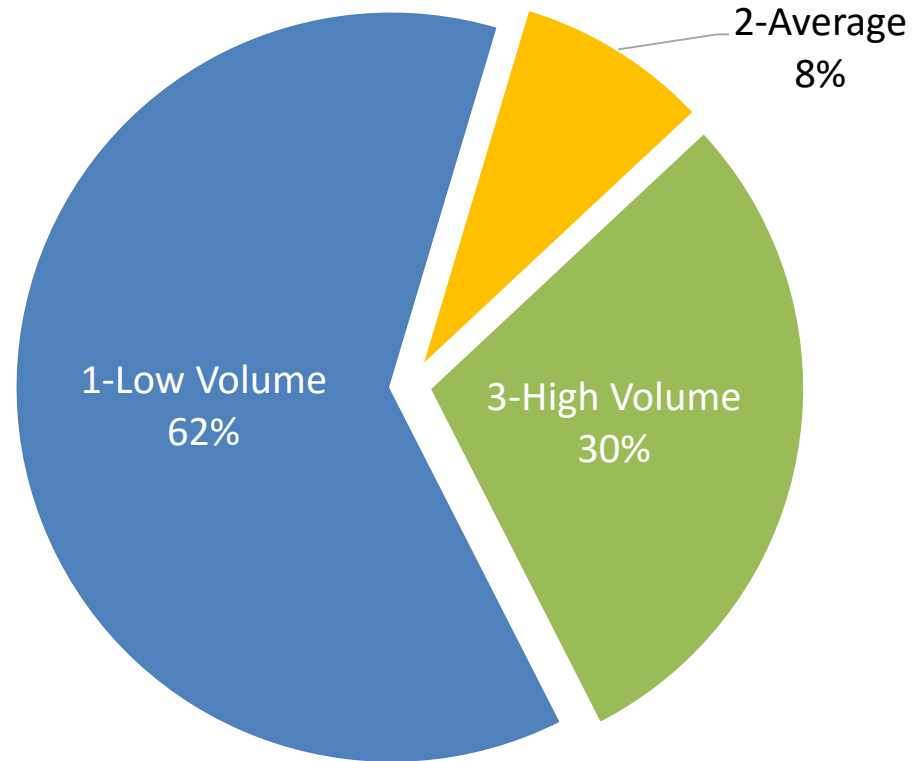
# Characteristics of high potential recruitment prospects



Source: NetMinder, March 2017

# Characteristics of high potential recruitment prospects

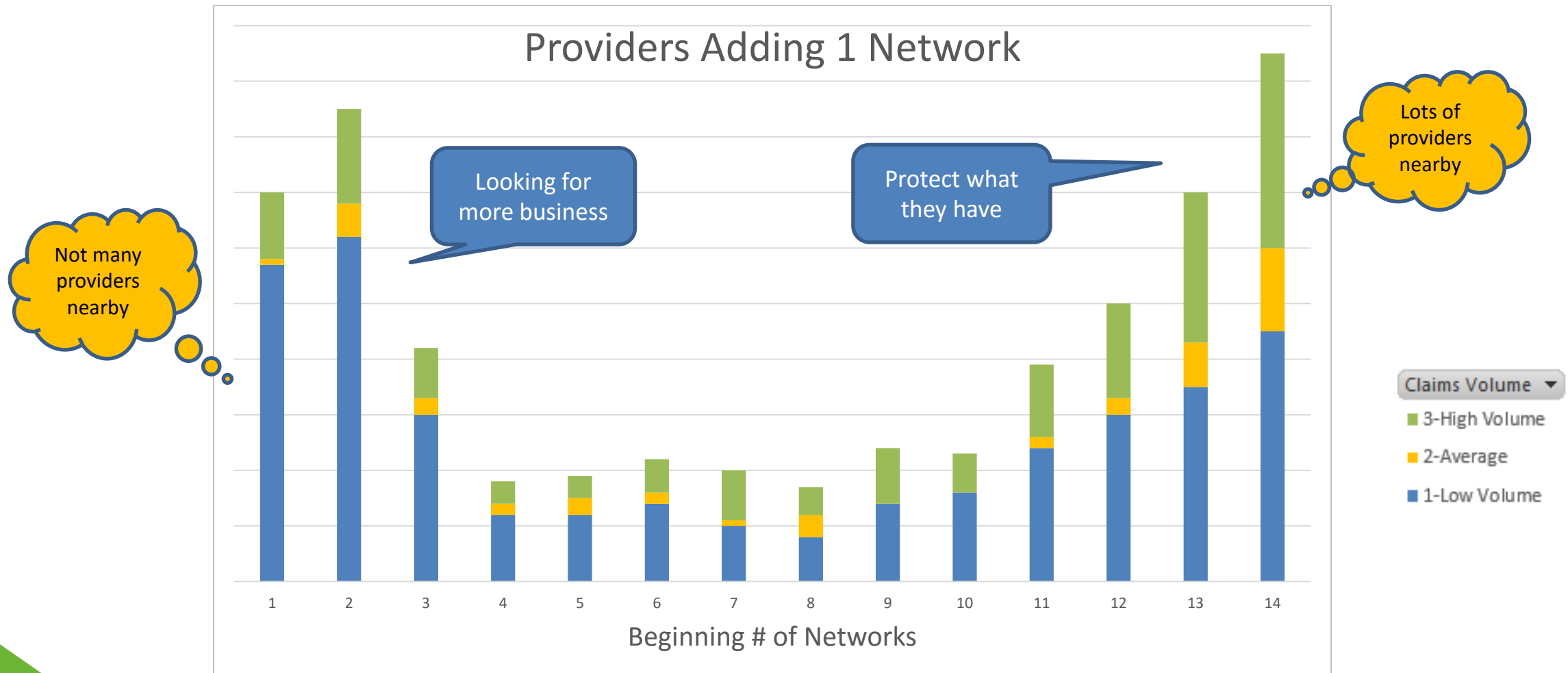
Provider Relative Claims Volume



Providers Adding 1 Network

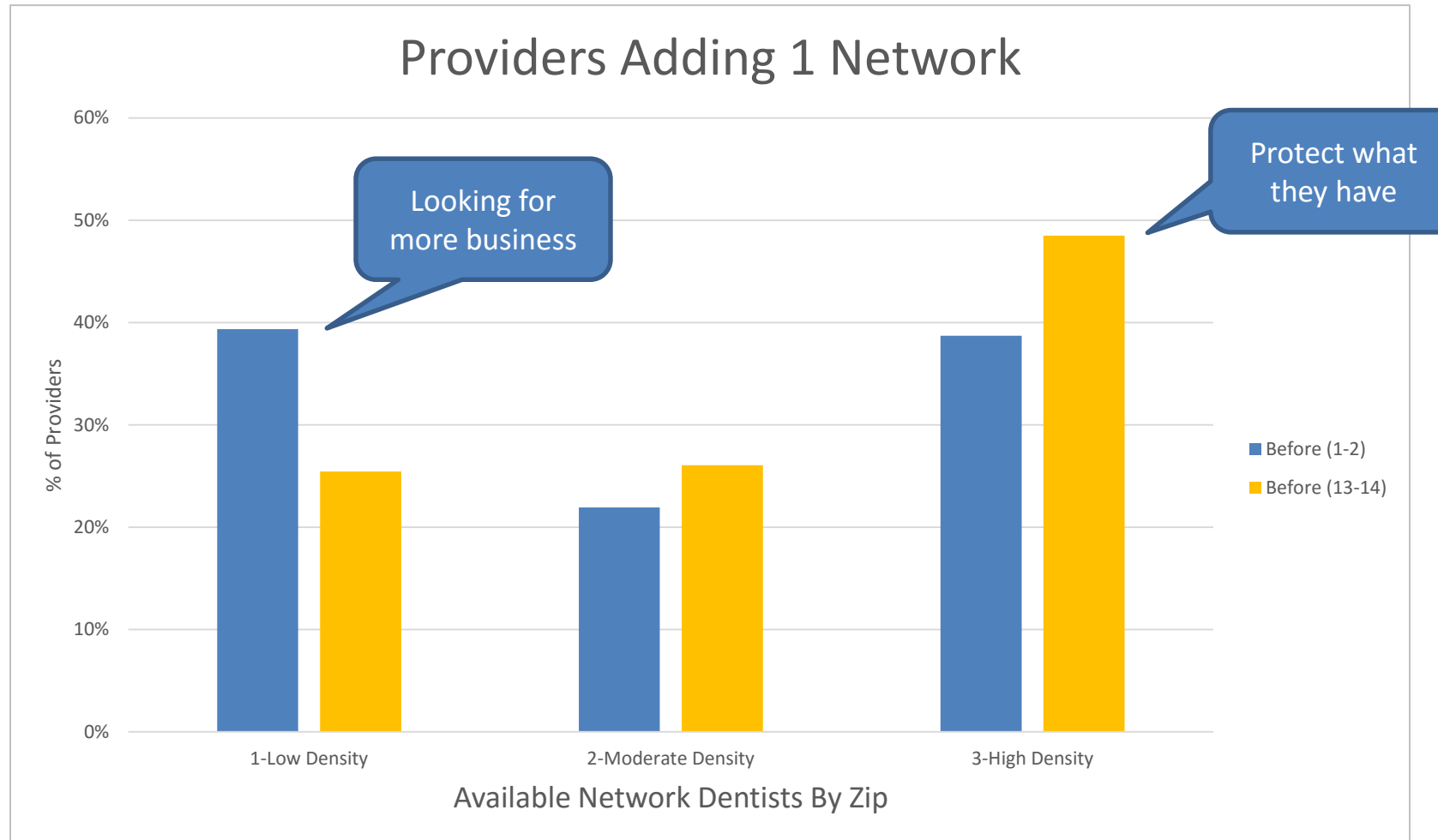
Source: NetMinder, March 2017

# Characteristics of high potential recruitment prospects



Source: NetMinder, March 2017

# Characteristics of high potential recruitment prospects



Source: NetMinder, March 2017



# Summary

- PPO networks continue to grow
- Overlap continues to increase
  - Conscious effort to improve disruption profile
  - Leasing, swapping and stacking networks magnifies the effect
- Market saturation varies by state, but there's still room for growth
- Targeted recruitment strategies are growing in importance
  - Number of current networks
  - Volume of claims
  - Density of surrounding geo area



Questions?

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954.703.3566



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