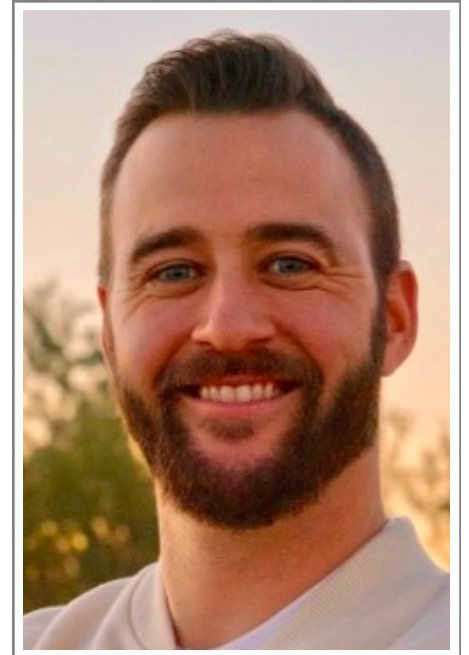
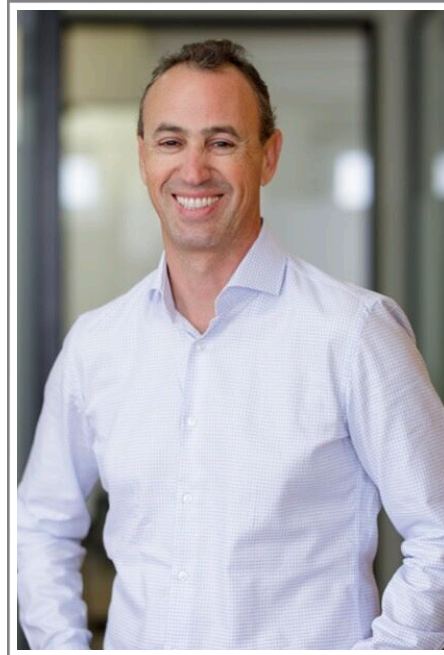


Ask the Expert

Retainer Club 2.0 with

Dr. Blair Feldman, Craig Weiss and Jesse Laizure





*It's never a great business plan
to give your patients homework.*

Imagine your practice without the hassle of retainers and the benefits of focusing on real, productive treatment. Retainer Club produces all of your end of treatment retainers for FREE* while bringing in new patients seeking treatment.

Your patients want easy, online, and affordable retainer replacement. You want efficiency and predictability. Retainer Club gives you both!

In this episode of Ask the Expert, you'll learn about all the new features, functionality, revenue sharing opportunities, and more. Simple, profitable retainer programs for your practice.

[Get a demo of 2.0 today.](#)

Dustin Burleson:

All right. Welcome everyone. I'm so excited to have back on the program Retainer Club, Dr. Blair Feldman, Craig Weiss, Jesse Laizure. Thanks guys for being here.

Craig Weiss:

Thank you for having us.

Dr. Blair Feldman:

Exciting to be here.

Dustin Burleson:

There's a lot of stuff going on. You've all been very, very busy. I want to make sure that our members know what's new and what's exciting and why they should pay attention.

Dr. Blair Feldman:

Yeah, thanks, Dustin. I want to get started. For those of you who don't know me, I'm Blair Feldman. I'm an orthodontist here in Phoenix in Scottsdale. I've been practicing since 2001, and I feel like I've done some exciting fun things in orthodontics along the way. I've was the team orthodontist for the Phoenix Suns and the Arizona Diamondbacks for three years. I was key opinion leader for American Orthodontics. I would say I feel like I've sort of done everything. I bought practice, sold practice, built practice. I've been an employee and an employer. Pretty much the only thing I haven't done is sell to a DSO, which I know is very popular these days. My practice transitions were always with individual orthodontists, so I have experience with that and I'm excited to share a lot of exciting news about what

Retainer Club has been doing and what we're going to do and some really exciting new changes.

Craig Weiss:

And Craig Weiss, my real claim to fame is being Blair's patient and his wife, Dr. Colleen's patient. For the last 20 plus years, I didn't read the fine print. There was some like indentured servitude, partnership asterisk that I must have missed. So we've been partners now for, gosh, for the last more than a half a decade now. I was a patent attorney for the first decade of my career, and then I became an entrepreneur and I was fortunate enough to raise a couple of hundred million dollars and take a company to \$1 billion valuation in 2014.

And so when Blair came to me with this idea of, "Hey, there's this dirty secret in orthodontics when you finish treatment, whether it was clear aligners or brackets when you're done, you need to wear a retainer when you sleep at night forever. Otherwise, it's going to undo this expensive orthodontic treatment." Of course, I knew that because I had to do re-treatment with Blair as an adult having not worn my retainer when I got my braces off when I was 13. And so the idea of making it easy, online and affordable for patients to have straight teeth for life was very exciting to me. So we got to partner and really excited to show you what we have for today.

Jesse Laizure:

And I'm Jesse Laizure. So I've been in dental for about 16 years. Had two dental companies with my dad and my brothers. Our last company, we built it to about 200 employees and sold it to three shape in about 2017. And

then I met Craig for lunch one day and he is like, "You got to come see my business partner Blair." And began some discussions. And long story short, jumped on board about a year and a half ago running a strategy for the company. So anything from sales, operations, technology. We're really excited today to share the new technology platform that we've been building behind the scenes, that's my area of specialty. So excited to be here. Thanks for having us, Dustin.

Dustin Burleson:

Cool.

Dr. Blair Feldman:

So recently my son Finn came to me after my wife and I had finished cleaning up from a dinner, and I found a comfy spot on the couch to catch up on emails and do a little web surfing. And Finn said, "I need a book." He forgot to tell me earlier that it was due on Wednesday and today's Monday. So I thought to myself, "If this were 20 years ago, I would have to make a serious plan to get to the bookstore. I would have to decide if I could run over during my lunch break at work or squeeze it in after work and between family activities." And as we think about how we would solve that book problem nowadays, that old solution, getting in the car, driving parking, searching for the book, checking out, returning home, it just seems crazy. Nowadays it's so simple.

We just switch on the screens on our phone that we are already on and look up at the book on Amazon and order it and it's delivered tomorrow. It's an amazing solution. It feels great. It's like one thing checked off your list, boom,



And then we start to think about the market of retainers. 9 million Americans will complete orthodontics this year alone. 100% of them need a retainer. Those retainers need to be replaced regularly.

one fire put out, one task completed, and it only took a minute. So if we think about this set of retainers, which we do a lot here, and we tell our patients that retainers are important, we tell them you wear them as long as you want to keep your teeth straight. Some of us say nighttime for lifetime, because if you don't wear them, your teeth are going to move. So imagine your child has only had the retainers for about a month and they suddenly can't find them. They think they left them at their friend's sleepover last night. They tried to have their friend look, but there's no luck and it's 8:00 PM You know tomorrow's slammed at work.

So it's going to be tough to find time to call the orthodontist and schedule an appointment. In fact, the last time you called the orthodontist, they couldn't get you in for an afterschool appointment for about a week. So you start to think the worst case scenario, what's going to happen to these teeth? Did I waste all my time going to those appointments? Did I waste thousands and

thousands of dollars to get this child in for orthodontic treatment? What's going to happen to my investment as I wait and I sit and I watch every day those teeth getting more and more crooked? It's a terrible scenario. In the current solutions that we've seen out there for replacing retainers are complicated. They require a visit to the office and they're expensive. What type of experience do you, who owns a practice or manages a practice, do you want your patients to have?

Do you want that old bookstore example or do you want the Amazon style that so many of us are used to just basically going onto your phone and ordering what you need, when you need it, when it's appropriate, when you can do it. At Retainer Club, we've seen hundreds of offices give their patients an easy online and affordable way to replace the retainers. And today, I'm excited to share some of their experiences and our learnings over the past years to help you grow your practice. So I want to start off with what's Retainer Club? Retainer Club we like to say is straight teeth for life. It's a retainer replacement programs designed for your practice, empowered by our powerful system. And when we think about consumer demand for online services, the demand obviously has never been higher. We all know this. We sort of survived Coronavirus, but when we looked for some statistics on what Coronavirus did to e-commerce, online commerce, it's \$219 billion of sales between 2020 and 2021.

And then we start to think about the market of retainers. 9 million Americans will complete orthodontics this year alone. 100% of them need a retainer. Those retainers need to be replaced regularly. We know that retention is long-

term, and we know that this market for retainers is compounding because that's the number of patients that finish each year. So when we think about the current process, in many practices, that process is complicated and it's expensive. You guys know the routine. It's basically call the office to schedule an appointment. You have to come in for a scanner impression. Then you wait a week for the office to make the retainers or order them from a lab, and then you have to go back to the office for delivery and you're paying somewhere between 250 and \$800 for that set of retainers. And you have to repeat that every time you need a set of retainers.

And for those of you with multiple children in your family, repeating that every time, for every member of your family that's had orthodontic treatment, and we've looked at the options, what else is out there? What are people doing to replace retainers? My favorite one, or I should say the least favorite one is "Just call our office. We'll take care of it. Whenever you need a retainer, just call our office." And I laugh because that's what I used to say to patients. There's also in-office plans that we've seen something designed by the office, it often becomes a part-time job that's not particularly profitable. We've seen retainer insurance, we've seen these expensive subscription plans. And when I say subscription, I mean for the office to pay a subscription to the manufacturer to develop your own plan. Saving your 3D models. I'm not sure if I love that one.

Craig and I always say, "It's never a great business plan to give your patients homework." Save these models, put them somewhere. I was just told by my wife to purge on

my junk. Luckily, I don't have a set of models in there that I need to save to get my retainers. I've seen free retainer plans, which to me have the opposite problems. It puts no value into the retainers themselves. And then of course, there's the do nothing and hope. And what I think is really interesting is that none of these plans allow patients to replace their retainers simply, to replace them affordably and to do it online. We like to think that the Retainer Club solution is just click of one button.

Craig Weiss:

Wish we could have stayed in loop that a little bit longer. It is that complicated.

Dr. Blair Feldman:

So the reality is that that practices that incorporate online services are going to thrive. And there's examples out there. There's online billing and financing. I think of OrthoFi and teledentistry and remote monitoring and online appointment scheduling.

Craig Weiss:

And when you think about it, I think about it from the perspective as a non orthodontist, as a consumer guy, someone who's built a business, and we all know when you have these new technologies, there's going to be winners and there's going to be losers. And typically the winners are the ones who embrace technology, and the losers are the ones who are saying, "You know what? I'm going to just keep doing it the old way." You could advance. And we all remember Blockbuster video. It was a huge part of our lives. For those of us who are old enough, you'd go to Blockbuster on a Saturday night to go

rent a movie, and of course, all the good ones were taken. And so you got to get there early and you got to figure it out. And that was the whole big thing. "What do you mean it's rented? Who rented it? Can we find out?"

Dustin Burleson:

Wild.

Craig Weiss:

And it's like they're out of business because they thought that their business was renting VHS tapes and not providing entertainment. And so what we know now is we're not obviously the first people to figure this out. You can see Warby Parker. Well wait a second. We'll do vertical integration. We'll have all these amazing products and you'll get your prescription from your doctor. But then we're going to be the ones that figure out, "Okay, so we've got all the different selections of glasses and your prescription from your doctor." Good for one to two years depending on state law. But we actually, I think we all like Warby Parker, I got to hang out with one of the founders a few years ago. We met at a conference that we were both invited to. And what we love about it is it's essentially B2B2C, meaning that they're not trying to cut out the doc. They're not trying to cut out the eye doctor from their model. Now of course, there's other models and 1-800-CONTACTS, right there you see in the middle of the page, skip the doctor's office, renew your prescription online. So we don't like this model because they're disintermediating the doctor from their patient. And of course, we all know that there's direct to consumer models in orthodontics, those that shall not be named. And of course we don't. We're not a proponent of that

approach. We think that patients should be going to a doctor's office to get orthodontic treatment. But what we've realized is this hybrid approach or click and mortar as we like to call it, is the right approach, which is you go to your doctor for orthodontics, but once you're finished with treatment and your teeth have gone from crooked to straight, your patients actually just want easy online and affordable retainer replacement. And that's what we provide.

Dr. Blair Feldman:

So when we think about Retainer Club, we've really sort of think about this sort of triangular relationship between the patients, the doctor, and then the retainers themselves. And the retainer system was designed. We've been designing and growing this system to better service all three of those entities to make it more seamless, to make it more comfortable and more convenient. And it started for our orthodontic partners with a free trial. And the free trial has grown tremendously. We're super proud to say that we have over 30,000 patients that we've serviced with Retainer Club and we know the benefits of the free trial. The free trial has brought us the idea that patients love home delivery of their retainers. We've learned that practices thrive when they outsource this retainer service. We also know that these digital services that we offer at Retainer Club at no charge, like virtual bracket removal works that a huge percent of our practices, I would say more than half, are actually scanning pre-D bond and then delivering the retainers on de-bond day for a perfect fit.

Now of course, there's scenarios where those retainers don't fit, and that's why we have our perfect fit guarantee.

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But what we've realized is this hybrid approach or click and mortar as we like to call it, is the right approach, which is you go to your doctor for orthodontics, but once you're finished with treatment and your teeth have gone from crooked to straight, your patients actually just want easy online and affordable retainer replacement.

But we're really excited, especially since Jesse came on with his background, that we've been able to get a remake percent below 3%. And it tends to hover one to 2%. We've also learned that retainers are a Trojan horse for new patients. So this idea, when you talk to that community that I mentioned earlier, those 9 million people who are finishing orthodontics, and you let them know that we're happy to replace your retainers and we can give you access to a program like Retainer Club, they now feel great that they can come in and actually talk to about their own orthodontic needs. They can say, "Well, I want to retainer to move this tooth right here." And all of a sudden that turns into an orthodontic patients. We've learned that retainers can extend the lifetime value. I love the idea when practices tell patients, we're

your orthodontists forever and things are going to happen in your life. You're going to get dental work done, you're going to get a new crown, you're going to need us at various capacities throughout life, and we're here for you. We can treat you along the way. So retainers remind patients who their favorite orthodontist is, where their practice is and obviously stays in their ear through this regular retainer replacement. Better I think, than some of the marketing of some of these direct to consumer companies. And then we design what we call our need a retainer wizard. And patients really appreciate this, where it gives them options. So you'll always have an option as a patient. You can buy a single set of retainers, you can renew your plan, you can upgrade or downgrade.

We've also seen growth in the Retainer Club platform because of all the things I mentioned above that we're in more than half the states in the US, more than 100 locations. Like I mentioned, we have a low remake percentage, and our team here in Scottsdale, Arizona has grown tremendously. We brought on Jesse, we brought on a chief technology officer, chief financial officer, and a head of sales, and we're excited about our growth over here. So the other part that's always fun is that we do get great testimonials from patients and the coming from around the country. They love the process and it's easy to navigate. They love the technology and the 3D scan. We hear that a lot. And having replacements mailed for traveling professionals is great. They love regular replacement, which is something we really set out to prove. Staff over here, we get great comments on our customer service team.

We now offer Spanish. Retainers in the mail. We sometimes joke, we're in the parent child relationship repair business. So we're really proud of what we're able to offer. And then we get to work with small practices and very large practices. And Dr. Burrow comes from a very large practice and in their office, Dr. Burrow tells us patients are automatically enrolled into Retainer Club and it's made retainer replacement, convenient, online and affordable. So we're proud to say we can service practices of any size.

Craig Weiss:

And everyone who wears a Retainer Club gets to be as good-looking as Dr. Sam Burrow.

Dr. Blair Feldman:

It's automatic, it's part of the subscription plan.

Dustin Burleson:

Love it.

Dr. Blair Feldman:

So when we look back at the last few years since Craig and I created this, and since I was beta testing it in my own practice. Some interesting points along the timeline were that we really created this initial software and this free trial, and we created subscription annual recurring revenue.

Right before COVID we were lucky enough to get a million dollar investment from the Venture Fund Will Ventures, and then subsequently we got investments from Revere, which many of you guys know, you're aware of Revere

and their dental backed venture capital fund and Flagstaff Ventures. And we moved into a new facility. Starting in 2022 that's when we really started to expand our executive team. And then we're excited today to talk about our new growth. So if we look back at what we've been able to accomplish, it is very exciting for me and for us, the free trial is a really powerful tool for offices. We brought staff and overhead savings to practices. The biggest concern we hear when we talk to practices is staffing. And we've been able to save tremendous staff time. My favorite story was, it was a practice that I'd spoke to about a year ago, and I presented our system and our free trial and the response was, "It sounds like an amazing program, but we do it all ourselves in-house." And I said, "Great." A year later, I got a call from this doctor in this office and he said, "I need you guys. I need it like ASAP." And I said, "I'm curious what changed?" And his answer was that they had had some changes in staff and his number one, his lead assistant kept skating out of the room to assist him to do a bonding to run make retainers. And he is like, "I can't take it anymore. I just need to outsource this program to somebody who can do it consistently and well." And they're a phenomenal partner with us.

Like I said, we've learned that retainers bring new patients into the practice. Patients love their patient portal, practices love the partner portal, the perfect fit guarantee. The ability to remake a retainer at no charge for 30 days is a really popular service. Although, like I said, I'm happy to say it's less than 3%.

And then this idea that regular retainer replacement is good for the patients and good for the practice, we've really proven that. But when we listened to our practices, we've also learned things that practices want, our partners want. They wanted more data. They want to know what the patients are doing, how often they're replacing their retainers. They wanted easier patient onboarding. They wanted multiple ways to get patients online and make it more simple. They also wanted a way to manage their scans and make that process of when they update a scan, does that get to us quickly?

Are the new retainers made from the new scan? What kind of visibility does the office have in terms of which scan we're using when it comes to troubleshooting the patient's needs? And then most importantly, they've asked for, "Is there a way that we can make revenue off this, that we really want to find a way to turn this into a revenue opportunity? I love the way you're extending our lifetime value with patients, but we think there's a way that we can kind of make this more revenue for our practice." So I'm excited to have Jesse tell you about some of the newest changes that are happening at Retainer Club.

Jesse Laizure:

Thanks, Blair. Yeah, so when you look at any business, any startup, you realize that you've got to innovate constantly. And so when we look at where Retainer Club became 1.0, we realized we needed to build a platform that was more sophisticated. In my previous business, we used an off the shelf software platform just to prove the business model. That's the first thing you do, prove the business model

that it works, which we've done. Blair's touched on that. We've proven that patients want at-home delivery, they want easy, online and affordable. And so then we built the 1.0 platform, and it's been great up until this point. We're looking to scale internationally. There's so many things that we're looking to do as a company, and we needed a robust platform to do that. And so we're happy to share today what we've been working on over the last, I would say 12 months with our 2.0 platform.

So our 2.0 platform, complete refresh. So it maintains everything that you know and you love about Retainer Club, but we are bringing you a platform that is going to not only provide a passive revenue stream for you, but a platform that you're able to do it. We've invested significant time and resources into building a complex platform that handles logistics in the backend. It's very complex and bringing that to you in an easy way. So this is a snapshot of our website that we are going to go through a whole rebrand here in September. Really, the point here is that we want to be orthodontics focused. So your orthodontist recommends regular replacement of retainers. This is just a snapshot of our website, keeping you as the orthodontist first and foremost.

Speaker 5:

Hello from Retainer Club. Today we are excited to share our brand new 2.0 platform, a technology that was built from the ground up to meet the needs of both patients and doctors. For patients we are providing something they've never had until now: an easy, affordable way to buy and replace retainers online anytime, anywhere. And for doctors, we built our new platform with the flexibility

to let you run your business the way you want to without cutting into hard-earned profits. You'll keep your revenue whether you offer an upfront Smile Care Plan or sell retainers on a strictly as needed basis. However you do business Retainer Club will be there to relieve you of customer support, lab work, and more. Plus, you'll benefit from all our marketing efforts, large and small. So let's take a quick look at how our 2.0 platform provides a simple and intuitive experience from start to finish. It all begins when you've completed your scan of a patient. All you have to do next is select Retainer Club from the dropdown in your practice management software. Then thanks to our newly integrated system, you'll instantly be able to see your pre-filled order and track its progress in your Retainer Club partner portal. For subscribers signup will be equally simple. Your patients can sign up and select their payment option with just a few taps.

Retainer Club receives all this info in real time and will begin production and packaging right away. Within days, your patients will be opening their fresh new retainers, including marketing inserts from your practice. And our 2.0 partner portal will allow you to do far more than track orders. You'll be able to easily monitor all of your patient trials and paid plan orders in one place, as well as accessing invaluable data for your practice, like Smile Care Plan, sales, lab savings, time savings, digital lab services like bracket removal and so much more. Plus Retainer Club is committed to giving your loyal patients equally simple and useful tools, from creating a login, to managing their plans, to tracking their shipments, to browsing all of our latest accessories. Thanks to our



We are bringing you a platform that not only provides a passive revenue stream for you, but also handles logistics in the backend.

upgraded platform, there's never been a better time to be a Retainer Club partner.

Dustin Burleson:

Love it. That's awesome. You guys have been busy.

Jesse Laizure:

Yeah, super busy. So that gives you kind of a high level overview of what we've been building and what's coming. Your plan, our platform is how we like to phrase it. And really these are the top four things as an orthodontist that you're going to benefit from the new platform. Number one, and again, we said this over and over, feedback from the market, feedback from our customers, revenue generation. "Hey, it's great that you're saving me cost on my retainers. I get free set of retainers, but I want revenue. I need revenue." A lot of offices we talk to, and we'll touch on this in a bit, they already have a Smile Care Plan program in place. No problem.

We say, "Hey, keep your plan and we'll be the fulfillment arm." Online ordering, keeping it very simple for your patients. This is a feature in 1.0, but it's been enhanced in

2.0, giving your patients the ability to upgrade, downgrade, pause their subscriptions, and a lot more. Retainers delivered. Again, this is something from the 1.0 platform as well where we've created an easy way for it to be delivered to your office, to be delivered to the patient's home. And then new patients. We provide marketing inserts and geo-targeted marketing around your office in a new way, which we'll touch on. So first, I'll let Blair kind of touch on the SMILE Care plan.

Dr. Blair Feldman:

So for our current partners and new potential partners, I think the most significant update is what we're calling the Smile Care plan. We listen to the partners and we explored other programs in orthodontics, both inside orthodontics and outside orthodontics. And what we created is a plan that brings tremendous value and convenience to your patient. It also brings revenue to your practice. So our Smile Care Plan is always powered by the Retainer Club backend, the technology. It's a customized plan, and when I say customized, it means it's customized in terms of the price. So we have practices that are interested in charging 5.49 for this plan, and we have other practices that are looking at closer to \$1,000 and are currently doing that pricing in their practice, and they want to continue to see that revenue. The plan includes the end of treatment retainer in a second set. If it's a patient at the end of treatment, two sets for other patients. It includes a patient membership to Retainer Club and access to discounted retainers, retainers as low as \$99. It's easy for patients to onboard. There's options in this program to service 100% of the patients, those that choose a Smile Care plan and those that don't tell you

more about that, it still has its perfect fit guarantee. And explain more how our system can use intelligence to basically continue to motivate patients to buy a SMILE Care Plan even if they said no to it at the beginning. So the dashboard that we have, the new partner platform gives you key data metrics on the Smile Care Plan sales like you saw in the video. It shows you new opportunities by integrating with many of the practice management systems. It's got shipment tracking, revenue tracking, and like Jesse said, marketing assets.

So when we start with the Smile Care Plan, looking at the revenue, the initial Smile Care plan, if you do our basic level plan, which we recommend, the plan is \$549 for your patients, your office will get over \$400 in revenue creation for each patient. But if the patient decides, "I want to just get retainers as needed and I want to get a single set of retainers," they can pay the office fee, we'll take out a fee for the Retainer Club fee, and they can still continue to get home delivery and home service to their retainers, even if they're not a member of the plan. The difference is they don't get access to the discounted retainers. So if we look at an illustration of what we would consider an average practice, but the JCO kind of calls an average practice. Let's say you do 300 removals a year and you decided in your practice your customized Smile Care Plan pricing is \$550, and in the office you would charge \$400 for a set of retainers.

If you look at a 50% conversion, meaning 50% of the patients that get removed are going to have the Smile Care Plan and 50% are probably going to replace one set of retainers, that's \$130,000 of new revenue and savings

each year. And of course that's going to compound as you continue to grow. Let's change the numbers a bit to a little larger practice. We know Dr. Burleson's practices tend to be larger. We'll look at 600 removals and we'll look at a practice that's priced their Smile Care plan at \$749, and we'll still assume just a 50% conversion. Now you're over \$300,000 in new revenue and savings each year. And of course Craig will tell you-

Craig Weiss:

Yeah, to me, I think the right way to think about this is if you're contemplating that you're going to eventually sell your practice, for example, to a DSO, which I know a lot of people do, you really should be multiplying that three 20 by probably seven, right? Because it's essentially straight profit. So if it's dropping to the bottom line, your enterprise value for your practice is probably whatever, a five to 7x EBITDA multiple, something along those lines. That's the real way to think about these savings and the new revenue.

Dr. Blair Feldman:

And of course, we're happy to show you by plugging in, and this is what we call kind of smile care design and modeling. What would happen if you assume you're going to have a higher conversion? So in this model, same pricing and same number of patients in the practice, but you're looking at a 75% conversion, now you're creeping closer to \$400,000 of additional annual revenue and savings. So what we love in our system, for the patients that choose not to get a Smile Care Plan and they just want to choose the office pricing, our need a retainer wizard has been redesigned to basically help show patients the

value of a Smile Care Plan in your office. How does that work out? So if you've decided you don't want a Smile Care Plan and you click need a retainer, you'll be told by the system, "You have two great options."

You can order one set at our office pricing, and again, you determine your office pricing, you let us know your office pricing, and that will be built into your unique practice plan. And so you can get that set of retainers. So in this example we're saying a set of retainers in our office costs \$400. It includes one set of retainers, home delivery, and you can order more as needed, or you get the ability to upgrade to a Smile Care Plan.

So now we're starting to really show your patients the value. And so in this example, for an additional \$149, you're getting a second set of retainers. You're getting access to retainers for only \$99 as you need them, and you're getting a five-year membership into Retainer Club. So it's kind of a no-brainer for patients and for the office. It's really, it's beneficial either way, and we can show you in how it works out both ways financially for the patients. But what I would say is the patient, you are going to be seeing patients choosing this, and this ends up being, I love what Jesse calls mailbox money. Money come into your mailbox for not doing anything other than being a Retainer Club partner.

Jesse Laizure:

And also Blair, touch on the fact that that 549 can be sold at a later date. So typically a lot of these offices will sell a \$549 plan or whatever their Smile care plan is while the patient's in the office, but they have no ability to sell that

patient a year or two years down the road. And the platform is doing that for the doctor. So technically you can get a \$4 check in the mail for a patient that has been in the system for a couple years. So let's keep that in mind as well. And then again, your plan, our platform with the online ordering, we've invested millions of dollars in this platform and with a click of a button, it's delivered. But also too, we're always innovating, like we mentioned. So one thing that we're going to have in the future is the ability to scan a QR code on our patented travel case underneath, and to be able to scan that QR code and know exactly who that patient is and where it needs to be delivered.

And with the click of a button, with a scan of a QR code, they have retainers at the door. And that's something that we as a company are investing into and you as doctors don't have to. You practice, you focus on profitable treatment, we'll handle the technology piece and the fulfillment. The next slide, again, retainers delivered in our boxes. And then the next slide will show the overall marketing. So what's inside that box? This is our new packaging and a little marketing flyer from you as the office. Now this is something that we're also innovating in a big way on the new platform. So we're actually giving the doctors the ability to upload a three by three design. It could be refer a friend or \$500 off of treatment or whatever it may be. That campaign uploaded to our platform, all of that marketing material is printed off on demand.

So let's say the next week the doctor decides, "Hey, I want to change my marketing campaign to X, Y, Z." They just



And with the click of a button, with a scan of a QR code, patients have retainers at the door.

upload a file to the 2.0 platform in that section, then it automatically gets printed out on every single case. So now we're not storing old marketing material, we're not making mistakes. So logistics, the backend of the system is really, really smart. And we do that again for you as the office. And we do more than just the marketing inserts. So this is an example from Dr. Seth Newman, Straight Set. We are now starting to geotarget. We have been in the past where we've enhanced it with this new technology platform where we are geotargeting for the offices creating microsites. So this is an example of a microsite for straight set, that microsite can then point to Retainer Club, but it's branded with you in your office really pushing out a set of \$299 retainers locally.

And we've seen with this campaign, significant response, what we're driving patients to Straight Set. And that's another value that Retainer Club brings and the platform brings. And then we have our partner locator. So if you join as a partner, we are going to put you on our partner locator. This also helps, that will also tie into that microsite that you saw. And then social media campaigns. So we do flights of social media campaigns for you, and

then it's up to you and your team to post these. But again, we're coming alongside of you and assisting you as a company. So technology platform, mar marketing company, those are two big areas that we're focusing in as a company.

And then this is a screenshot of the ad hub. So this shows KPIs of ad spend, and you guys can adjust your ad spend. So if you want to spend \$500 a month or \$1000 a month, we can adjust that ad spend. And then you find cost per lead and those sorts of things, those KPIs. And we have this dashboard in included and then a video book. So when we design your Smile Care Plan, we can then create a custom video book. And this has been awesome. Our partners love this. A custom video book that you can put at each operatory and have the patient sit there. They open it up and it shows the video that explains why you've partnered with Retainer Club, your Smile Care Plan, and all the benefits that come with that. And we do that for our partner offices. So again, a ton of marketing that we push on your behalf and you don't have to do anything.

Dr. Blair Feldman:

And what I love about this one, and we've had offices do both, is we have a standard version with a professional voice actor, but we also love when doctors want to make their own voiceover. So we've have examples from Dr. Burrow and basically we handed them a script. We pulled video from their site, so there's really nothing for the doctor or rather to do. Then read the script and into your iPhone and record it and we'll take it over and our team will turn it into a video from your practice, customizes the

message from your practice about the importance of retainers and regular retainer replacement.

Dustin Burleson:

That's awesome.

Jesse Laizure:

Then yeah, so here are all the benefits, custom branded inserts, microsites, social media posts, partner locator, optional ad program, and these video books as well.

Craig Weiss:

And one of the things I'll just add to that is what we always say to these practices is you should just be focusing on profitable orthodontic treatment. You don't make your own toothbrushes, you don't make floss, you don't make dental chairs, you shouldn't be making retainers. And even if somehow you do, are you making custom software backend Amazon fulfillment centers in your back office?

Dustin Burleson:

I hope not.

Craig Weiss:

Yeah, we've done it. It's not easy. And it took us a long time and millions of dollars of software development. And at the end of the day, because we don't move teeth because that's your job, and we're not trying to steal your patients, we're just a post orthodontic treatment retention program. What that does is it makes us really sort of the best partner because we're agnostic. But it doesn't matter

whether you're doing brackets or you're doing aligners, however you're doing your treatment.

We're scanner agnostic. We're really trying to be that orthodontist best friend, which is when we first started talking Blair and I just realized, "Wow, who's on your side? You've got the direct to consumer companies trying to steal your patients. You've got GPS now doing some clear aligner stuff. So who's on your side? Who's the orthodontist best friend?" And ultimately, your competitors are going to do this. They're going to use us, and then their patients are going to be like, "Oh, dude, you had to go into the office? My retainer showed up in the mail." That's where this is all heading. And Dr. Newman, you heard about it a minute ago. I mean, super excited about what we're doing. I'm sorry, Jesse, you didn't mean to steal you-

Jesse Laizure:

Yeah, no, yeah, I gave Dr. Newman a call, I don't know, it was a couple months ago. And he's been a huge fan of Retainer Club since the beginning, since we started, since he's Dr. Blair and Craig in the past. And when we kind of talked through what 2.0 is going to bring, he was like, "Wow, you guys have cracked the code. Sign me up." And that makes us feel like that we're onto something, that doctors love this idea, but they also want to keep their revenue.

And we've created a platform to do that. And so Dr. Seth Newman, he's number one to sign up when 2.0 launches. Got it about that. And then my background, we had an international business, so I was fortunate to build relationships with manufacturers around the world. And

now with this 2.0 platform, we have the ability to scale it. And so we are doing an international expansion this year. We're planning on launching an Australia in Q4 this year, and then Canada and Japan early next year. And then we'll probably head over to Europe the end of next year or the year after. So really excited about our international expansion.

Dr. Blair Feldman:

And I know we've been asked many times by listeners and clients of Dustin's who are not in the US, they're interested in our programs. And so these programs will be local, they'll be local based, local shipping, local manufacturing, and we're excited that we can now kind of say yes to the opportunity that we've been asked about so many times about Canada and about Australia as the closest one. So Jesse's done a great job of really creating those relationships and continuing to grow those. So when we go and sort of think about what 2.0 is and what we're offering, and we are very shortly ready to release 2.0, I would say it's going to be an early September. It starts with the retainer. So it's got to be the highest quality orthodontic retainers. Now we've created the ability for your office to create a customized Smile Care Plan, your pricing, our platform, we've created a way for simple passive revenue so that we've created the system that will continually remind those patients who choose not to have a Smile Care Plan for whatever reason, that this is the best value and the best way to maintain their orthodontic results.

We've updated from scratch our partner and our patient system. So we're excited to show you that. We've got now

options to service 100% of the patients. So patients that don't want to be signed up for a Smile Care Plan, they can still get home delivery of their retainers, our digital lab services, and then our new marketing services, which Jesse just showed. So for our current active partners, access to 2.0 will come in early September and that access will be free. There is no charge for our current active partners. They get all the benefits of 2.0. And what we understand to be true is that some of them are going to want to stay in their free trial plan, and we're always going to continue to offer the free trial plan. It's an amazing plan. It has tremendous benefits. It fits offices very well.

Some offices are going to want to switch all the way over to a Smile Care Plan, and we can help them do that. And others are going to want to offer some version of a hybrid of a Smile Care Plan and individual pricing. And we can help in all those scenarios. So for the new partners, somebody who's listening who's maybe already has a plan, like a Smile Care Plan or retainer plan in your office, or if you've thought about it and kind of been searching around, searching for some way to do this, but either thought it's going to be too complicated, it's too much work. Maybe you've even tried one and maybe stopped. I can think of several examples of offices that we've spoken to who've tried these plans and they were either frustrating or they just didn't get the performance they want. We can help out.

And here's what we can offer in our startup package. The first thing we're going to do is help you design that Smile Care Plan. And as we continue to get data, our goal is to

share data from other practices around the country with you so you can help make good decisions on how to price that plan and how to generate the best revenue for your practice. So we'll help with that modeling. We'll create that custom landing page setup which collects information on the patients. What we found is there's basically two groups of patients that are coming to that. Outside patients that are coming, where one of the most searched terms when you put in retainer replacement on Google. And we've got videos that have high viewing rates for just simple things like how do you replace my retainers? How do you take off the retainers?

How do you care for retainers? So the costing landing pages can be from outside search. They can also be from internal patient referrals to that plan and that page. And what we found is there's some really interesting qualifying questions that could help your practice too. Some of these patients come in and they've been wearing their retainers up till last night and they literally lost them yesterday. They're good retainer wearers, they just need a retainer. Other patients are coming in and they just don't know. They're not sure. They think they need a new set of retainers, but they want an expert to look at them. It's an incredible opportunity for you to get new patients through our marketing and our system. We've got our previous patient email re-engagement letters. These emails can literally be worth tens to hundreds of thousand dollars in your practice as you share the link for the Smile Care Plan.

And they either turn into Smile Care Plans or re-engaging these patients for orthodontic care or care for the

families. In office marketing collateral can help you get this into your office, and that includes printed material and videos. You got to see a little sneak peek. I love our video expert in our company put together the smallest that actually was a real squirrel eating a setter retainer. I don't know what he enticed the squirrel with, but it was something delicious I think. Jesse showed you those video books. We'll include 10 of those video books to get you started so that it's really easy. Not only can your office be trained to explain the Smile Care Plans and your partnership with Retainer Club, your video can do it well too when the staff doesn't have to be right chairside. It'll include bimonthly KPI check-ins.

We found these are incredible and super helpful in the practice to just continually remind the practice. How do you use Retainer Club system best? How do you motivate those patients in your practice to come back in for either retainers or for treatment? So super helpful. And then of course, Cub Custom website content, giving you the tools you need to add retainer information to your site. Whether it's articles, links to our blog, new blog creation, but information on how you can take retainers and make it into a profitable component of your practice. So when we look at the value of each of those items, you're looking at the smile care design, the custom landing page, the onsite setup and training with travel from one of our training partners, you get to a total value of over \$10,000. And we're excited that for those offices that are really ready to get started, they want to get this moving in their practice.

They want the easiest way to do it, and they want the most powerful system behind that. We've discounted it significantly for those who are interested in getting started. So for 12.99, for those offices that really want to get on this before August 1st, we're excited to offer this opportunity and it's really easy to do. You just go to retainerpartner.com/register and Adam or Nicole from our team will reach out to help you get started and get that scheduled so they can make sure they get in so that in early September when the 2.0 switch gets flipped, you're ready to start using this and you're ready to start making Q3, Q4 really incredibly powerful when it comes to retainer programs in your practice. For those that are interested after August 1st are not sure if they want to make a decision, of course we'll be here for you.

You won't be able to get access to this pricing, which Jesse told me I'm crazy to do this pricing, but I said, "We got to figure out a way to help partners who really want to get started on this right away and see the benefits of this." But we'll always be here for you and your practices to help put retainer programs in your office that are powerful for your practice and powerful for your patients. So happy to answer any further questions or Dustin, if you have some thoughts and questions. And again, we appreciate Dustin, your time and giving us this opportunity, and we appreciate you hanging out to the end of the webinar to hear the juicy details.

Dustin Burleson:

Yeah, I love it. The best things make perfect sense. You can't poke any holes in any of this, right? I really do believe you've cracked the code to what a lot of office

think they want to do. They want to sell a retainer plan and then they realize fulfilling it is very difficult, and to fulfill it at this level is impossible. They're just not going to recreate the millions of dollars that have been invested in a backend system that's truly automated. It'd be like the bookstore owner saying, "Well, if they click, I'll drive the book to their house." Yeah, good luck doing it at a scale. Amazon has got you beat as a local bookstore owner if you need the book tonight for a book report that's due two days from now. So patients want this. I can tell you we have been an advocate for a long time because it's what patients want.

They do not want to come back for retainers. If you really talk to them or you really listen to your frontline employees, patients don't want to come back for retainers. If they can click and ship online easily and affordably, they're going to do that. And so if you don't have this and a competitor does, I think you're really in a bad position. So we're thrilled to see obviously, Dr. Burrow, a longtime member of ours, Dr. Newman, longtime member of ours. I think our members get it. We'd like to help more orthodontists get it, particularly as we see more new members showing up from Australia and more book downloads from Japan. If you're listening and interested in this, it has my full endorsements. So I think it's brilliant, and my hat's off. Great, great job. It's very cool.

Dr. Blair Feldman:

So we do get asked frequently by orthodontists, is there any opportunities to invest? And that's Craig's specialty, not mine. But I would recommend if you have questions and you want information about investing, Craig's the

best person to speak to about that and his email's easy. It's craig@retainerclub.com

Craig Weiss:

Yep. Happy to speak to anyone.

Dustin Burleson:

Cool. We'll post the link below and we will make sure everyone, if you have questions and you want to send those to us, you can email us, I'll make sure we make our email and phone number accessible. We probably won't put it straight on the website to avoid all the spam we get when we do that, but we will end the email that you probably clicked to get here. There should be a place to email questions and let us know if you need follow up, but just awesome work guys. It's phenomenal.

Dr. Blair Feldman:

Thank you.

Craig Weiss:

Thank you, Dustin.

Dustin Burleson:

Cool.

Jesse Laizure:

Thank you, Dustin.

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ASK THE EXPERT

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