



CDA

COLORADO DENTAL ASSOCIATION  
ENTERPRISES

**ENDORSED PRODUCTS**

**Partner Toolkit**

*A guide to becoming an endorsed provider of CDA Enterprises Endorsed Products program*

## GUIDELINES FOR PROPOSAL

Thank you for your interest in becoming an endorsed vendor of the Colorado Dental Association (CDA) and CDA Enterprises. This program is limited to a select group of companies offering products and services that Colorado dentists need to operate a profitable and efficient practice. The due diligence performed by the Board and staff of CDA Enterprises, Inc. (CDAE) helps eliminate hours of research by member practices – only high caliber companies with impeccable products and services, references and a solid financial background are selected to become approved Endorsed Product merchants.

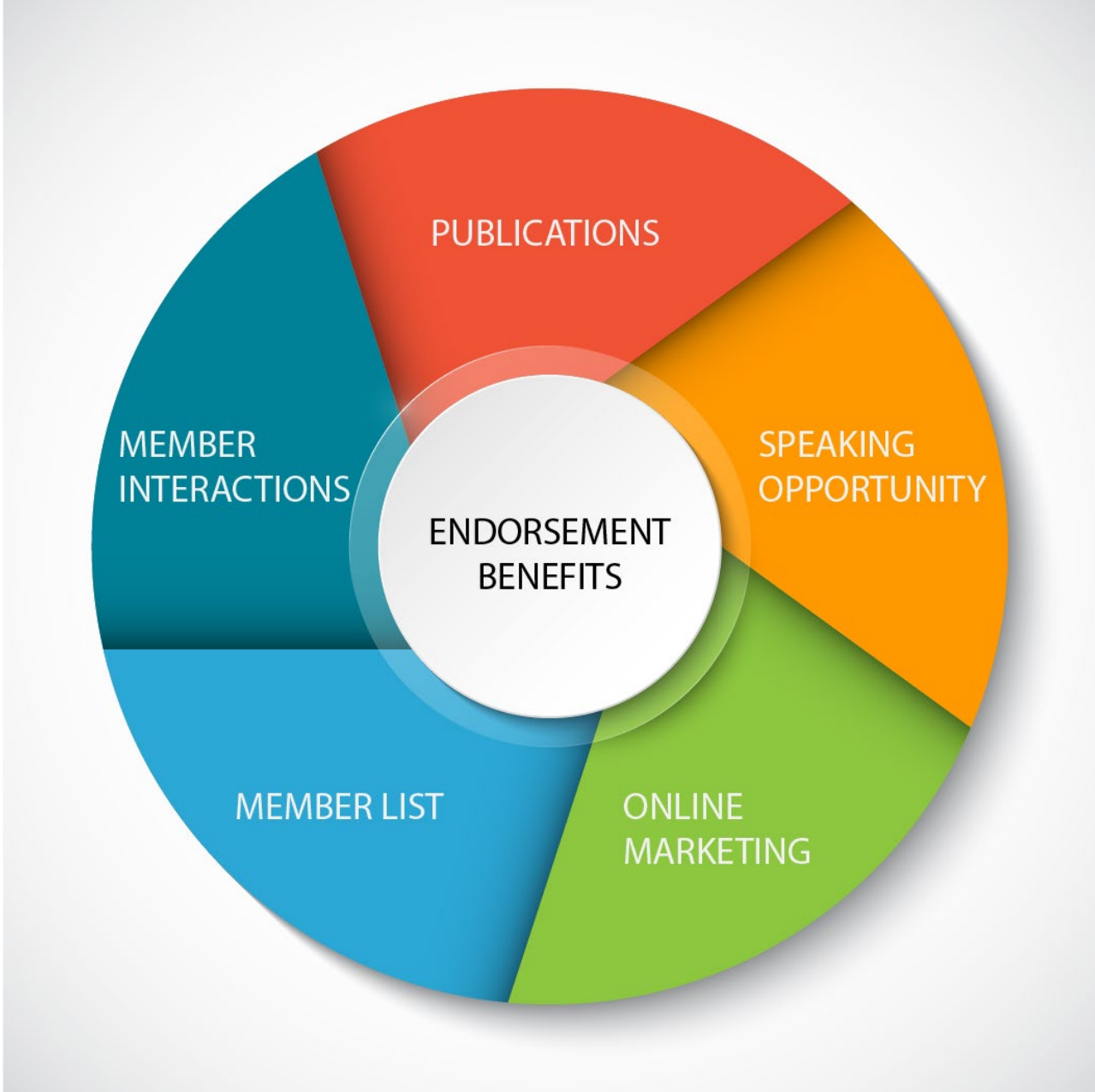
This toolkit should be used as a guideline for submitting a proposal to become an Endorsed Products approved merchant. If accepted, the proposal (including the response to the request for information contained in these guidelines) will become a part of the contractual agreement between your firm, CDA and CDA Enterprises (CDAE) – the wholly owned, for-profit marketing arm of the CDA.

Your proposal will be submitted to CDAE staff prior to submission to the CDAE Board of Directors (BOD) that oversees Endorsed Products. Additional information may be required from the review staff or the full BOD. **Review by CDAE staff does not imply a guarantee of review by the BOD.**

The CDAE BOD meets several times per year. Proposals are generally reviewed at the meeting following staff evaluation. Should you have any questions about the proposal process, please call me and I would be happy to assist.

Again, thank you for your interest.

Molly Periera  
Executive Director  
CDA/CDAE  
303.740.6900 | [molly@cdaonline.org](mailto:molly@cdaonline.org)



## CDAE Marketing Assistance:

### **Online Resources/Marketing**

- Announcement on CDA Homepage
- Access to CDAE logo for your company's marketing materials and featured on exclusive page on the CDA's website
- Endorsed Products E-Blast to more than 2,600 active licensed members
- Social Media posts

### **Print Resources**

- CDA *Journal* Article
- CDA *Journal* Ad
- CDA "eNews"
- Onsite Official Convention Program

### **Member Interaction**

- CDA Component Society Meetings – Speaking Opportunity
- CDA Component Society Meetings – Promotional Opportunity
- CDA Component Society Meeting – Product Distribution
- CDA Annual Meeting Sponsorship Opportunities
- CDAE Booth at RMDC

### **Membership List**

- Access to the CDA's membership list



## Overview of the Endorsed Products Endorsement Process

### **Step 1: Application**

Interested merchant receives and completes “Endorsed Products Partner Toolkit”

### **Step 2: Staff Review**

CDAE Staff reviews application to consider submission to the CDAE Endorsed Products Committee.

### **Step 3: Due Diligence**

Research Company - Similar companies invited to apply for consideration. Staff may make on-site visit to company.

### **Step 4: Board Review/Presentation**

CDAE Board reviews product/service. When necessary, Company may present product/service to BOD.

### **Step 5: BOD Vote**

Based on research, competition and contract offering, BOD votes on whether to recommend an endorsement to the Colorado Dental Association.

### **Step 6:**

Based on the recommendation by CDA Enterprises BOD, the Colorado Dental Association Board of Trustees may require a presentation. A vote will be made to determine whether or not to enter a licensing agreement with the Company.

### **Step 7: Approved Vendor**

The CDA rolls out endorsement through communications channels, per agreed upon marketing plan.



**Certain standards and conditions are applicable to all agreements the CDA and CDAE enters, including, but not limited to:**

- The product(s)/service(s) to be offered must be made available at terms, prices and conditions more advantageous to CDA member dentists than would otherwise be available to non-members.
- The product(s)/service(s) must be available to and marketed to all CDA member dentists throughout the state of Colorado.
- Company must procure a booth and actively market it at the annual CDA Meeting typically held in June every year in Colorado
- Financial disclosure of your firm must be submitted to CDA Enterprises on an annual basis.
- For each product(s)/service(s) sold to a CDA member, a royalty and a marketing fee must be remitted to CDA. The fee will be applied against a financial guarantee by your firm to CDA and CDAE (combined) of no less than \$5,000 in gross annual income for the first year of the endorsement. The second-year guarantee will be no less than \$7,500, and the third and continuing years will be no less than \$10,000.
- CDA will, through a separate agreement, contract with CDAE to perform any and all marketing services necessary to meet the obligations of the agreement.

- Any subcontractors used must be bound to the terms and conditions of the agreement between your firm and the CDA/CDAE.
- All officers and employees of CDA, CDAE and your firm will be comprehensively indemnified and held harmless for any claims arising out of or in connection with the agreements between your company and CDA member dentists.

## Endorsed Provider Questionnaire

### VENDOR PROFILE

- Please provide a vendor profile, including number of years in the business, types of products sold and number of years on the market, and location of corporate headquarters.
- Please outline the philosophy of your company, including future direction and efforts underway to keep ahead of trends in the industry. How will this philosophy benefit CDA member dentists in the next five years?
- Please provide an organizational chart, listing officers and their positions of the corporation.
- Please provide a description of the specific benefits that CDA member dentists should derive from entering into an agreement with your firm.
- Please provide a detailed marketing plan for introduction and continued visibility of product or services.
- Please provide a copy of your most recent annual report and audited financial statements.
- Is your company involved with any current, pending or foreseeable litigation? If yes, please provide a statement.

### PRODUCT SPECIFICATIONS

- Please explain the primary features of your product. How will your product or service benefit a CDA member? Show the timeline from initial customer contact through consummation of the deal.
- What enhancements to your product do you see in the next five years that will benefit CDA member dentists?
- How does your product or service compare with others in quality and price? List key competitors.
- Please explain your pricing structure for CDA member dentists, including any up-front fees, administration fees, marketing fees, ongoing maintenance fees and any additional fees
- Does your product(s) interface with dental software and if so list them?

### BUSINESS BASE

- How many dentists in Colorado are currently your customers?
- How many dentists outside of Colorado are currently your customers?
- How many agreements have been terminated prior to expiration in the last five years?
- How many dentists in Colorado have you presented proposals to in the last six months?
- Please provide three dental references, including practice names, city, contact,



phone, email and fax number.

### CUSTOMER SERVICE

What ongoing customer support can CDA member dentists expect to receive?

What type of training do your customer support personnel receive?

- If customer service is outsourced, do representatives serve dentists

exclusively?

- How many sales representatives service Colorado dentists?
- Where are the sales representatives based?
- What is the average tenure of these representatives?
- Does each dental practice have regular account support once the initial deal is closed? If yes, please explain.

### FINANCIAL COMMITMENT TO CDA

- Do you estimate returning at least \$10,000 per year in royalties and marketing fees to CDA/CDAE by the third year of this endorsement?
- Please explain the royalty structure your company would provide, including signing bonuses and ongoing fees.
- Using the above formula, please estimate this year's revenue, based on existing business.
- Will compensation be provided for any CDA member dentist already in the pipeline, but not closed, as of the contract date?
- Please describe any additional benefits CDA members will receive for choosing your company as a partner (i.e. preferential pricing, etc.)
- As an approved vendor, how will your company support the CDA other than through royalties and fees (i.e. sponsorship of events, providing complimentary speakers for education, advertising in publications, etc.)?
- Please provide quarterly reports in Excel (format by member last name, business name), showing new business and compensation earned on new business. Please state contact name for these reports.

### ASSOCIATION RELATIONSHIP

- How many other state dental associations partner with your company? Has your company lost any state partnerships in the last five years? If so, how many? Why?
- Please list other state dental association partnerships, tenure of partnership and contact name.
- What minimal joint marketing efforts would you require in return for the compensation to the association?

Submit completed questionnaire to Molly Periera at [molly@cdaonline.org](mailto:molly@cdaonline.org)

After completing the approval process, we will work together to create the best custom-designed program that fits everyone's needs. Your active participation is critical for the success of the product/service and we appreciate you considering an endorsement with the CDA.