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Manchester advisers get their teeth into sale of Patient Plan Direct to Agilio Software



L-R: Ian Nash, Trowers & Hamlin, Jeremy Cole, Cole Associates, Jeanette Woodall, Conrad Broadbent, Simon Reynolds, Paul Ellaby, Trowers & Hamlin

Agilio Software, the leading provider of healthcare software solutions has completed the acquisition of Runcorn-based Patient Plan Direct (PPD), a specialist dental membership plan provider that helps practices grow sustainable, recurring income and strengthen patient relationships. The acquisition completed on 29th December 2025. The deal brings together Agilio's established dental compliance, workforce and marketing solutions with PPD's proven expertise in plan design, technology, training, and support to nurture strong growth and retention.

PPD works with independent practices, regional groups, and Dental Service Organisations (DSOs) across the UK, providing end-to-end support from plan design and pricing through to onboarding, marketing, promotion, and day-to-day administration. Its teams in client services, operations, and business development support thousands of dentists and hundreds of thousands of patients, with a strong track record in retention and proactive plan management.

The founder and majority shareholder of PPD; Conrad Broadbent, together with fellow shareholders Jeanette Woodall and Simon Reynolds were advised on the sale of their company by Jeremy Cole and David Middleton at Cole Associates Corporate Finance and Paul Ellaby and Ian Nash at Trowers & Hamlin (legal advice).

Bringing Agilio and PPD together creates a powerful platform that connects membership plans, compliance, practice operations and practice growth solutions. Existing PPD and iPlan customers will continue to be supported as normal while a carefully managed migration and integration programme is delivered.

Ben Betts, CEO of Agilio Software, said, "Acquiring PPD is an important step in Agilio's dental strategy, building on our existing products such as iTeam, iComply and iGrow, and giving us the opportunity to offer dental practices joined-up solutions that cover practice-branded membership plans, compliance, workforce management, and practice growth."

Simon Reynolds, Managing Director, PPD, commented, "Joining Agilio will allow the business to invest further in technology, expand its support for practices and groups, and help bring high-quality preventive care to more patients. The culture of both organisations is rooted in long-term relationships and practical, on-the-ground support for dental teams."

Conrad Broadbent, founder and majority shareholder of Patient Plan Direct added "Jeremy (Cole), Paul (Ellaby) and their teams provided the shareholders with fabulous, coordinated corporate finance and legal advice & guidance throughout the sale process. They've worked together on several deals in the past, including a previous exit for me to a Nasdaq listed entity which was a real help in hitting the ground running and anticipating the shareholders' needs and priorities."

For more information on Agilio Software and Patient Plan Direct, see www.agiliosoftware.com and <https://patientplandirect.com/>

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