



2008 SUMMER CONFERENCE

The Four Pillars of MarketingSM: Effective Strategies for Growth

Presented by:

**Mary Christensen
President**

Experienced Resources, LLC

The FlexGeneration[®] — the power of experience working for you

**Terrie Wheeler
President**



PROFESSIONAL SERVICES MARKETING, INC.

Targeted Strategies for Business Growth

Agenda

- **Introduction**
- **History of Marketing in Health Care**
- **Four Pillars of MarketingSM**
- **Implementing a Plan**
- **Tips for Growing Your Health Care Business**

Attached Materials

Page 3: Speaker Biographies

Page 5: Strategies to Effectively Market Your Medical Practice:
Growing your Practice Using the Four Pillars of MarketingSM

Page 10: Patient Satisfaction Assessment

Page 12: Strategic Communications Assessment

Page 14: The Pros and Cons of Various Marketing Strategies

Page 17: Components of a Marketing Plan: Measuring Marketing ROI

Mary Christensen



Mary is co-founder and president of Experienced Resources, LLC, and is a human resource professional with more than 15 years experience in health care. She has held leadership positions in pediatrics, internal medicine, ophthalmology and OBGYN practices.

Mary is a member of the MMGMA, Minnesota Hospital Association (MHA), Women's Health Leadership Trust (TRUST), Healthcare Human Resources Association of Minnesota (HHRAM), and several Human Resource organizations. Mary is a board member of Vail Place.

MaryChristensen@FlexGenER.com

952-888-4635

Who we are

Experienced Resources, LLC is a contract staffing firm that specializes in providing business professionals with 20+ years of experience for projects and interim assignments in health care.

Terrie S. Wheeler, MBC



Terrie is founder and president of Professional Services Marketing, Inc., a consulting firm dedicated to working with professional services organizations in the health care, legal, financial services, education, and other service industries. She has more than 20 years of business planning and marketing experience.

Terrie is a frequent presenter and has trained businesses throughout the country. Terrie has been an engaged member of the business community and has given her expertise freely in various capacities. She also serves on several boards.

twheeler@psm-marketing.com

651-633-2711

Who we are

Professional Services Marketing, Inc. is a firm dedicated to working exclusively with professional services firms in the industries of:

- Health care
- Legal
- Financial Advisory
- Banking
- Other service industries

Strategies to Effectively Market Your Medical Practice: Growing your Practice Using the Four Pillars of Marketing SM

By Terrie S. Wheeler, MBC
President, Professional Services Marketing, Inc.

There are really just two areas you need to focus on as you market your medical practice: having a well-balanced marketing plan built around marketing best practices for health care providers, and making the personal commitment to actively implement your plan. Simply stated, if you do these two things consistently over time, you will be successful.

Marketing for Health Care Providers: Today's Reality

Health care providers walk a fine line between viewing themselves as a profession and acknowledging the reality that they are also a business. Physicians, however, are guided by the professional conduct rules set forth by state licensing boards. Generally, these guidelines prohibit the most basic of unethical practices including presenting anything in your marketing that is not true or will mislead the public. Often licensing boards will have guidelines to prohibit marketing messages that present you as “better” than your colleagues.

In today's marketplace, health care is also a business and all businesses must attract new customers to survive and thrive. Most practitioners know that in order to pay the rent and utilities, meet payroll, hire experts and run a profitable medical practice, they must balance the activities of serving patients with those activities required to generate a constant stream of new business.

Call it practice development, business development, new business origination or sales; doctors in private practice need to attract new patients to sustain and grow their practices. Some physicians market well, while others rely on their strong reputation with the hope it will provide a steady stream of new patients. (This marketing approach used to work but is not effective today.)

Having worked with service professionals for over 20 years, I know that busy doctors do their best to get out and develop new relationships, especially with referral sources. But in reality, they often wish patients would simply hear of their expertise and call— and that their telephone and inbox would provide a steady stream of new patients who pay on time, refer them to others, and on and on the cycle would continue. But for those health care providers who aren't exactly sure what to do when someone says, “you need to get out there and do more marketing,” this article is for you!

So let's talk about the need for a balanced marketing strategy. Make sure your marketing activities are equally allocated under each of The Four Pillars of Marketing SM:

- Pillar I: Retaining and Growing Relationships with Existing Patients**
- Pillar II: Attracting New Patients and Developing New Business**
- Pillar III: Increasing Name Recognition and Awareness**
- Pillar IV: Utilizing Targeted and Effective Communications**

Pillar I: Retaining and Growing Relationships with Existing Patients

At least 70% of next year's revenue will come from your base of existing patients. Don't overlook them! Growing relationships with your existing patients is at the core of your success or failure as a health care provider. To do this, patients must be delighted, not simply satisfied with your services and your bedside manner. One of the single greatest things you can do to continue developing professionally is to commit to nothing less than providing exceptional service to your patients.

Many of my clients will ask, "How much time should I spend marketing?" The answer, while not as simple as most doctors would like, is as much time as it takes. Successful professionals develop a "marketing mentality." They are always marketing and providing exceptional service. They view marketing as part of their practice and look for subtle opportunities to attract additional patients from those they see every day. Always remember, if you wait until you have time to market, it will likely be too late.

The core of patient service is found in a patient's satisfaction with you, your clinic, and the services provided. If you wonder what your patients think about you, ask them! As a health care provider, your patients are your greatest source of information on how you're doing in the area of providing superior service as well as how you can improve. If you want to maximize your potential as a doctor and are willing to take steps to transform the ways in which you deliver services, consider conducting a patient survey. It can provide a detailed roadmap on how to better serve the needs of your existing patients.

Pillar II: Attracting New Patients and Developing New Business

Know the criteria of your best patients and referral sources (A-level people). What traits and characteristics do they have in common? Do they hail from a particular demographic? Proactively seek to develop new relationships and business opportunities with those individuals and referrals that meet your A-level criteria.

You never know where patients may turn up (seated next to you on an airplane, at your child's school function, at your church or synagogue). Always be prepared to have a response to the question, "So, what do you do?" Your answer should be clear, concise and offer benefits to the prospective patient or referral source asking the question.

Two of the best tools in business development are "listening" and "asking questions." Use active listening skills to uncover how you can help the person. Asking questions shows you care about them and their needs and gives you an opportunity to gather background information necessary to continue building the relationship.

One of the best strategies for finding, starting and building relationships is to become active in trade or professional associations which attract your prospective referrals. Consider targeting an industry in which people suffer from a common health problem. If you are a specialist, you will want to broaden your network of general practitioners. Just like you, other doctors will refer patients to those they know and trust. Once you've initiated a relationship, remember to nurture it by keeping the primary practitioner in the loop on her/his patient and consulting her/his if the patient must see another specialist.

You may also consider targeting other kinds of professionals such as dentists, attorneys, case workers, or others as referral sources. In many cases, you will find trade

associations not only provides a wealth of information on an industry you are interested in, but also attract the referral sources with whom you want to do business.

Pillar III: Increasing Name Recognition and Awareness

People must know who you are in order to utilize your services or refer you. Focus on increasing your personal name recognition in the marketplace through public relations and community involvement. The creation of a personalized, strategic, proactive public relations campaign can lead to increased patient work and pique the interest of prospective patients and referral sources. Though often confused with advertising, public relations tactics are often more substantive and are certainly more cost-effective. Public relations techniques, if carefully designed, are meant to educate, inform and influence key audiences through credibility building, image-enhancing third-party media endorsements.

Community involvement should also be part of your overall plan because it allows you to make a contribution of great value to others and also helps you build individual and clinic name recognition. When making the decision to become more involved in your community, make sure you focus on organizations that align with your core values. Making decisions with a conscious nod toward core values creates a higher level of personal effectiveness and greater overall satisfaction as a physician actively involved in his or her community.

Pillar IV: Utilizing Targeted and Effective Communications

Know what makes you unique as a doctor, then capitalize on your skills and communicate timely, relevant information to your contacts and patients. Whether you are developing external communications directed at your patients and referral sources or internal communications for your colleagues and staff, it is critical that both the content and its presentation reflect your key messages and present you and your clinic in a positive and professional light. While face-to-face relationship and trust building are often a physician's most powerful business generating tools, of equal importance is how others perceive you through your written, printed and electronic communications.

When faced with the desire to create effective communications, increase your familiarity with various marketing communication tools and understand when and how to apply them. In addition, develop powerful ways to create and integrate key messages about yourself and your practice into all that you do. Finally, learn ways to differentiate yourself from your competition through high-level communications that convey your professionalism and unique expertise.

Marketing Tips - - by Pillar of Marketing

Keep a copy of the following marketing best practices - - organized by Pillar - - on top of your desk (and top of mind). Commit to implementing just one tactic each day. Use these handy reminders between phone calls, while on hold, or even while waiting for a long document to print.

Pillar #1: Retaining and Growing Relationships with Existing Patients and Referral Sources

- Good relationships are the key to any successful practice, and the telephone is still one of the most personal ways to connect. So pick up the phone and call a

patient or referral source you have not talked to recently. Touch base and check in to simply see how the person is doing; consider inviting them to have coffee with you. Or, call a patient you recently treated just to see how they are feeling.

- When you've got a satisfied and happy patient, don't be afraid to ask them to refer you to others. Patients don't recognize that you may be looking for additional business. So, ask them for referrals. Timing is everything. Ask some questions to determine the level of your patient's satisfaction. If they are appreciative and grateful for your advice and services, they are likely willing to refer you to friends, neighbors and colleagues.
- From time to time, you will inevitably have patients that choose to end their relationship with your clinic. But don't write them off. Instead, contact them to determine what happened; communicate to those on your team to prevent future patient defections.
- Did you know that invoices can be effective marketing tools as well? Conduct a mini-audit of your billing practices to ensure the invoices your patients receive clearly communicate the value you bring to them.
- Though you may think patients know all the services you provide, the average patient only knows what you did for them. Take a minute near the end of the patient visit to share a brief "commercial" about your clinic or practice. Be brief and conversational. Focus on something you want to promote.
- When a patient or referral source makes a new referral, personally thank him or her. This rarely occurs, especially with patients. They will enjoy your thanks and attention. Chances are they'll also continue to refer others to your clinic. When you've built a large enough referral base, consider publishing a list of your "Friends of the Practice" in your clinic newsletter.
- One way to stay top of mind with referral sources is to watch for them in the news. If you see them referenced in an article, featured on television or interviewed on the radio, send them a personal note of congratulations.
- Networking is another good way to deepen your relationships with current referral sources. Start by contacting two referral sources whose practices or interests may compliment one another and introduce them. Better yet, identify five referral sources you would like to introduce to one of your colleagues with a goal of expanding the clinic's overall business with each.
- Do your patients seek you out no matter what their physical ailment? You may not be qualified to care for all of their needs, but when they turn to you for advice because they trust you, you have the opportunity to refer them to another trusted doctor, which in turn nurtures both relationships. Encourage your patients to come to you for advice.
- Last but not least, spend time cultivating your "internal" relationships on behalf of your patients. Tell your assistant how much you appreciate his or her role in helping you serve patients. Take a junior doctor to lunch and find out more about the work (s)he is doing with a goal of introducing them to other referral sources

you have. These people work with you every day; see yourself through their eyes and imagine how this comes across to your best patients.

Pillar #2: Attracting New Patients and Developing New Business

- As you begin to develop new ideas to grow your patient base, take a moment to note what your best patients have in common (age, gender, ailments, procedures conducted, from whom they were referred). Focus on attracting the highest caliber patients with medical needs that utilizes your best and highest levels of expertise. For example, consider targeting a company or industry that is known for providing good insurance to its employees. You could offer pre-employment physicals or wellness programs. Or target industries with a common health problem. Even health care lawyers are looking for medical expert witnesses.
- Use this information to create a Top Ten list of referral sources you know would be a great fit with your practice, your clinic, and its services. Then, make it a point to call someone on your Top Ten list to meet for lunch each week.
- It's also important to spend time assessing your networking and relationship-building practices. Develop a plan to become more involved in events which attract your "best" type of patient and referral sources. For example, identify a trade or professional association that attracts your ideal patients or referral sources and become a high-profile member of that organization (offer to write articles or speak to members).
- Finally, take a few moments to reflect upon what has led to your success to date. If you found yourself with no patients tomorrow, what would you do first? Revisit the marketing behaviors that have led to your success. While you're at it, don't forget to keep your sales pipeline up-to-date. Who are you working on right now to attract as a patient?

Pillar #3: Increasing Name Recognition and Awareness

- As you begin the process of building awareness for you and your clinic, you will soon realize that you aren't alone in your quest for more exposure. That's why it is so important to identify a substantive area of medicine in which you have a high level of expertise. Then, develop an outline for a presentation you could give on the topic. Make sure to identify the ideal target audience for your presentation and contact the appropriate organization with your idea.
- Along the same lines, create an outline for an article you would like to have published and identify where you would like to see the article in print. If you're not sure where to start, review some of the medical trends published in medical journals. This should get some ideas flowing so you can develop your own story pitch for the media. Go ahead and contact a few local medical, news or community editors to persuade them your story idea has merit. They will either ask you to write a bylined article, or may even assign a reporter to "cover" the story.
- Another strategy is to reflect upon where (and how) you are spending your time in the community. Seek to involve yourself in organizations you are committed to

and passionate about. Consider serving on a non-profit board of directors; identify which organizations mesh with your interests and begin investigating the process of becoming a board member.

Pillar #4: Utilizing Targeted and Effective Communications

- Your professional biography is a dynamic marketing tool that helps patients discover who you are as a physician. Review and update this document regularly— enlist your assistant to automatically add speaking engagements, published articles, new professional affiliations, and other accomplishments to keep your biography fresh and relevant.
- Similarly, develop as many substantive examples of representative experience as you can and add them to your biography – for use on your website or to give to prospective patients and referral sources. Include things such as: The Patient’s Situation (the problem), Your Approach (the solution), and The Result Achieved.
- Keep in mind that patient communications don’t have to be long or contain flowery speech to be effective. Case in point: send a quick email to a few of your patients to let them know of changes in medical care that may impact them. Keep it short and sweet, but let them know you are looking out for them.
- While it’s tempting to get sidetracked with a variety of marketing ideas, don’t neglect the “housekeeping” tasks that help your clinic stay nimble. For example, review your clinic’s website and make a suggestion on enhancing the site. Or, ensure your patient contact information is updated in the database; initiate a process for making corrections and additions. Finally, look at what you’re working on... if an assistant or junior doctor can do the drafting or research for you, delegate, delegate, delegate!

Building strong and enduring patient and referral source relationships takes time and needs to be implemented consistently over time. Make sure you have a system in place to track your marketing efforts and to keep yourself accountable to generating results. Marketing is something you must weave into the fabric of your practice—so commit to doing something proactive to market your medical practice each day. Remember, if you wait until you “have time” to market, it will likely be too late! By doing something small each day, you will reap the rewards of having loyal patients and referral sources who will go out of their way to refer others to you.

Patient Satisfaction Assessment

Why should you consider soliciting feedback from your patients? Consider the following:

- You will expand and strengthen existing relationships with current patients. Asking for feedback and suggestions lets your patients know you care about what they want and are committed to making changes to retain their business.
- Your patients will help you identify gaps in your service offerings as well as identify opportunities for new services or to assess geographic expansion opportunities.
- Cross-marketing opportunities are revealed by determining patient awareness of the services you offer and by uncovering needs that are being met by your competitors.
- You will identify the marketing efforts that have an impact on your patients' purchasing decisions and those that don't.
- You will discover the most effective and appreciated forms of communication with your patients as well as the topics of greatest interest to them.

Commit to taking action on the feedback you receive and tie the findings of your patient survey directly into the patient service philosophy of your clinic. Use this tool to determine how sufficient the quantity and quality of feedback is that you solicit from your patients.

1. Based upon what you've heard from satisfied patients, what do patients appreciate most about coming to your clinic and seeing your doctors?
2. How do you solicit feedback from your patients?
 - Written survey
 - Web-based survey
 - Personal interviews
 - Focus groups
 - One-on-one meetings
 - At the end of appointment
 - During conversations with patients
 - My patient lets me know if she/he is upset
 - I don't solicit feedback
3. How do you rate yourself in HOW you solicit feedback from patients?
 - Exceptional Very Good OK Not Very Good Really Bad
4. How often do you formally solicit feedback from your patients?
 - At least once a week
 - Once per month
 - Once per year
 - Every few years
 - Never
5. How do you rate yourself in HOW OFTEN you solicit feedback from your patients?
 - Exceptional Very Good OK Not Very Good Really Bad

6. How committed are you to taking immediate action on any feedback you get from your patients?
 Very Mostly Somewhat Not Very Not at All

Strategic Communications Assessment

Whether you are developing external communications directed at your patients and referral sources or internal communications for your colleagues and employees, it is critical that both the content and its presentation reflect your key messages and present you and your clinic in a positive and professional light. While face-to-face relationship and trust building are often doctor's most powerful business generating tools, of equal importance is how others perceive you through your written, printed and electronic communications. Objectives you want to achieve in strategic communications include:

- Increase your familiarity with various marketing communication tools and understand when and how to apply them
- Develop powerful ways to create and integrate key messages about yourself and your practice into all that you do
- Learn ways to differentiate yourself from your competition through high-level communications that convey your professionalism and unique expertise.

Please take a moment to objectively assess the communication tools you are currently using to communicate the expertise you bring to patients. In each area, identify the grade you would give to each segment of your communications.

1. Have you ever given any thought to your clinic's positioning in the marketplace?
 Yes No
2. How well developed would you say your clinic's positioning is in the marketplace?
 Very Mostly Somewhat Not Very Not at All
3. How recently have you reviewed the overall quality and appearance of your print communications?
 Within the last six months Within the last year A year or two ago
 Three to five years ago More than five years ago
4. In your last print materials redesign, what percentage of your materials were redesigned?
 All of them Most of them Some of them A few of them Just one piece
5. To what extent do your patient newsletters and updates reflect the overall look and feel of the rest of your print materials?
 Very Mostly Somewhat Not Very Not at All
6. To what extent do your medical services brochures reflect the overall look and feel of the rest of your print materials?

- Very Mostly Somewhat Not Very Not at All
7. How well developed is your physician biography? Is it current? Detailed including education, certifications, memberships, publications, and community activities?
 Very Mostly Somewhat Not Very Not at All
8. How well developed are your representative experience examples? Do they focus on the value you bring to patients and showcase your unique areas of expertise?
 Very Mostly Somewhat Not Very Not at All
9. Is the content in your printed materials also available electronically? Yes No
10. How effectively do your bills and statements to patients communicate the value your services bring to the patient?
 Always Usually Sometimes Rarely Never
11. How often are your bills and statements to patients reviewed for accuracy before sending?
 Always Usually Sometimes Rarely Never
12. How often do you send updates to your patients via group email?
 Always Usually Sometimes Rarely Never
13. To what extent do your electronic communications reflect the overall look and feel of your clinic's identity?
 Very Mostly Somewhat Not Very Not at All
14. How easy is it to navigate in and with your electronic communications?
 Very Mostly Somewhat Not Very Not at All

The Pros and Cons of Various Marketing Strategies

You're off to the races - you have identified your strategic marketing objectives, determined who your target audiences are, and have nailed the messages that make you unique as a professional. You are now ready to move into the world of tactical implementation. But before you jump in, consider some of the reasons to pursue (or not) a number of different professional services marketing activities.

Marketing Strategy	Pros	Cons
Advertising	Builds name recognition; builds brand of company; establishes presence in marketplace	Expensive; patients don't hire service providers because of advertising
Patient Satisfaction and Retention Strategies	Keeps company focused on its patients; early problem spotting; good will generated; need patient's perspective to do business planning	May not like what you find out (which is better than the alternative - the patient just leaves)
Competitive Market Research	Stay smart on who you're playing with; intelligence on competitors; to spot new trends and opportunities	Must know what you're looking for; must know what to do with information you find; can be way too time consuming if you don't have a pro do the searching
Corporate Identity and Branding	Establish brand in marketplace; consistency in visual presentation; helps firm "become known"; must look "on par" or better than competition	Expensive to do it right - hire a top notch graphic designer; invest in high quality printing
Individual Marketing	Take control of career; provides focus to marketing efforts; allows you to set goals; ability to be objective and strategic about growth of practice	Takes time to implement a marketing plan
Direct Mail (announcements, newsletters, invitations)	Keeps company and its products/services in front of current and prospective patients; conveys important information	Cost of graphic designer, copywriter, printing, postage, distribution; may not be as effective as electronic communications
Cross-marketing	70% of next year's revenue will come from current patients; start with patients who already use your practice; satisfied patients	Takes cooperation between groups, practices, divisions; can cause competition and turf battles; compensation system may not reward

	are easier to expand than new patients are to attract	
Internet Web Site Planning, Development and Promotion	It's a must have in today's business environment; more cost effective and timely than printed materials; easily updated with new information; every reason to have one	Involves making an investment to "do it right" for website planning, design, technical development, copywriting, maintenance, hosting, tracking visitor logs - and must promote the site to current and prospective patients!
Marketing Information Systems (patient and contact database management)	MUST have accurate, current information on current and prospective patients and referral sources; enables targeted (timely) communications	Investment in the "right" contact management or database software for your business; must invest in keeping the data current; learning curve to get everyone onboard
Marketing and Sales Materials	For a "leave behind" after a sales call; to show visual identity of equal or greater quality than competitors; to convey important information on the company	Become outdated quickly; people today prefer web-based communications; costly to design, write, print and distribute
Industry Marketing	Leverages past experience in industry; patients more likely to hire you if a perception of expertise of their industry exists; very targeted initiative; creates entrée to write and speak for organization; provides targeted follow up opportunities	Must make a time commitment to becoming active in an industry association; need to become a high profile member for industry marketing to be most effective; if national, you must cover travel cost to attend conferences
Proposals and Presentations for New Business	To win new business!; to show focus on patient; to show how you think; to convey understanding of patient needs and approach to meeting needs first (before bios and company information); to reinforce firm identity; allows creativity in pricing options	It takes time to go above and beyond and not use the cookie cutter approach; requires creativity in how to price products or services - not the same old approach
Public and Media Relations	Cost effective; more credible than advertising; Extremely strong way to build name recognition and awareness;	Must be done consistently and professionally; takes time to meet with reporters or create story pitches;

	provides strong content for website, proposals, marketing materials, lobby reading	MUST be responsive to reporters and dedicate the time to be available
Referral Source Development	Entrée to hundreds of patients; good networking; opportunity to pull a team of providers together for one group or industry; mutually beneficial	Takes time; risky if you make a referral who bombs with a patient; trust between professionals develops over time
Association Marketing Strategies	Captive group of prospective patients and/or referral sources; opportunities to write and speak; perception of the tie to the group making you better choice to work with; opportunity to let your knowledge shine!	Time and money involved with meeting attendance, travel to national conferences, willingness to follow up and make things happen (rather than hoping because your name is in the directory that patients will be calling you)
Sales Strategy	Must have sales strategy to stay in business; must be strategic about who you approach; to meet your business growth goals	Need confidence; ability to consistently follow up; ability to handle rejection; takes time, patience and faith
Patient Seminars	Credibility with patients; highlight particular service, product or area of expertise; ability to partner with referral sources; makes you look smart!	Logistics intensive, requires tenacious follow up for success
Trade Shows	May provide a way to reach a large target audience; always try for a speaking gig; opportunity to network with others in your industry; may actually result in sales!	Very time intensive; mired in with your competitors; expensive to print materials; time consuming to follow up; forced to offer a gimmicky take-away

Components of a Marketing Plan

A marketing plan is a critical component of any business growth strategy. The plan helps to define measurable marketing goals and objectives, to identify target audiences, to develop key messages, and to create a timeline and a tactical implementation plan. In addition, a budget is created to ensure marketing strategies occur on time and within budget. A well written marketing plan will directly reflect and augment the practice's overall business plan and growth goals. Marketing plans differ significantly from practice to practice, reflecting the key points of differentiation found within various companies. However, the main components of a strategic marketing plan are fairly consistent, as outlined below.

Executive Summary

The executive summary of the marketing plan should provide a high-level summary of the information contained in the plan. It will allow someone interested in an overview of the plan, to review the information quickly, without having to read through the whole document. This section should be written last, once the plan is completed.

The Situation Analysis: Where are We Now?

As its title suggests, the situation analysis offers a summary of the current situation – a snapshot of the practice today – and should answer the question, "Where are we now?" Let's assume a marketing plan is created for a health care practice. A number of questions need to be answered including: Who are the key patients and how were they attracted to the practice? What type of services does the practice offer? With whom does the practice compete, and in which areas? Does the practice have a business plan? What kind of patient feedback have we received? What are the overall business goals (financial, staff, patients, etc.)? What are the strengths of the practice? What are its weaknesses (be objective)? What are the key marketplace opportunities? What are the demographics of your "ideal" patients (describe them)?

Statement of Marketing Objectives: Where Do We Want to Be?

Once a thorough situation analysis has been completed, the next step is to identify the marketing objectives by asking, "Where do we want to be?" This involves identifying where the organization would like to be in terms of revenue, patient base, service offerings, etc. Marketing objectives should be broad sweeping statements of the businesses overall growth and patient service objectives and should cover areas including:

- Fully serving existing patients (cross marketing)
- Attracting new patients to the practice
- Increasing the practice's overall name recognition and awareness in the marketplace
- Ensuring that patient needs are being fully addressed by the practice (type and level of service, responsiveness, overall patient satisfaction)
- Expanding the services offered to patients

Target Audiences

After the marketing objectives have been determined, it is important to summarize who the target audiences are – who you want to "hear" the marketing messages and hire the practice. Successful services marketing requires the existence of very targeted messages which will be delivered to a highly targeted group of current or prospective patients or referral sources. For example, target audiences for a technology services consulting practice may include:

- Existing patients (to ensure the practice is fully serving the needs of its current patients)
- IT directors in large corporations
- Presidents of mid-sized companies
- Members of industry-specific trade associations attracting prospective patients
- Other practices with whom yours can develop strategic alliances
- Referral sources
- Trade/business media

Key Messages

For each target audience, identify audience-specific key messages (based upon the strategic objectives of the practice). Think about the practice's key points of differentiation with competitors. What makes the organization unique and a better choice than other similar practices? Key messages should clearly and concisely communicate why your organization should be selected over other practices offering similar services (your competitors).

Tactical Implementation Plan: How Will We Get There?

Once the plan has been defined, the practice needs to identify which tactics and marketing programs will be pursued to meet the stated marketing and growth goals. This portion of the plan addresses, "How will we get there?" For every category of your plan (i.e., patient retention, attracting new patients, patient satisfaction, increasing name recognition, etc.), identify cost-effective, results-oriented tactics. Generally, a tactical implementation plan for a professional services practice will include activities in areas such as:

- Advertising
- Patient Satisfaction and Retention Strategies
- Contact Management and Individual Marketing
- Competitive Market Research
- Corporate Identity and Branding
- Individual Marketing
- Direct Mail (announcements, newsletters, invitations)
- Cross-marketing (selling additional services to existing patients)
- Internet Web Site Planning, Development and Promotion
- Marketing Information Systems (patient and contact database management)
- Marketing and Sales Materials and Brochure Development
- Industry Marketing
- Proposals and Presentations for New Business
- Public and Media Relations
- Referral Source Marketing

- Association Marketing Strategies
- Sales Strategy
- Patient Seminars
- Trade Shows

Action Plan

Once the tactical implementation plan has been agreed upon, create a detailed timeline to ensure you manage the progress of each marketing tactic pursued. The report will contain a summary of the activity being pursued, person responsible, next steps and deadlines, and most importantly, results generated. You may also want to track the cost of each activity to help measure the results from a cost versus return on investment perspective.

Measurement Ideas: The ROI on Marketing

Determining return on investment of marketing initiatives is a constant challenge. Not every marketing initiative will directly result in a new patient. Therefore, in addition to attracting new patients, marketing success can be measured by:

Marketing Strategy	Measurement Techniques
Advertising	Circulation; call to action in ad; patient survey
Patient Satisfaction and Retention Strategies	Patient survey, interviews, focus groups
Competitive Market Research	Current files on competitors and key prospects
Corporate Identity and Branding	Patient survey; marketplace perception research
Individual Marketing	Number of patient and prospect meetings per week
Direct Mail (announcements, newsletters, invitations)	Attendance at events; readership surveys
Cross-marketing	Amount of new business generated with existing patients; patients using multiple services
Internet Web Site Planning, Development and Promotion	WebTrends and other statistical web usage software packages
Marketing Information Systems (patient and contact database management)	Everyone uses the technology; data is current
Marketing and Sales Materials	Visual identity more sophisticated than competitors
Industry Marketing	New industry-specific patients
Proposals and Presentations for New Business	Number of RFP's Received; number won
Public and Media Relations	Media impressions; key messages conveyed; number of viewers/readers/listeners; comparative cost for advertising

Referral Source Development	Number of new referral source relationships; tracking where business came from
Association Marketing Strategies	Creation of a high profile; attend meetings; write and speak for organization
Sales Strategy	Tracking target patients; meetings scheduled; proposals created; work attracted
Patient Seminars	Number of attendees, right type of attendee; follow up efforts; tracking inquiries and new business
Trade Shows	Number of attendees overall; opportunity to speak to group; follow up initiatives

Budget

Any good marketing plan should tie dollars to the strategies being pursued. How much of your overall budget are you willing to allocate to marketing initiatives? There is no magic formula for dollars spent versus marketing success. However, marketing is an investment in the future growth of the business. Generally speaking, the more a practice is willing to invest in results-oriented marketing strategies, the more likely it is that those tactics will pay off in additional work from existing patients, attracting new patients to the practice, increasing the practice's name recognition in the marketplace, ensuring the satisfaction of your current patients, and, most importantly, increasing total practice revenue.

In summary, a good marketing plan will address:

- Where we are now (situation analysis)
- Where we'd like to be (objectives, target audiences, key messages)
- How we will get there (tactical plan, action plan – with measurement components – and budget)