

WMM

PRACTICE MARKETING PLAN WORKBOOK



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ABOUT WHITEBOARD MARKETING

At Whiteboard Marketing, we commit to growing each dental practice as a partner and team member.

Our dentists think of us as their off-site marketing department. We understand dental practice marketing from both an inside and outside perspective, which enables Whiteboard Marketing to tailor the most effective strategic services and programs for each dentist and practice. We work with dentists on a local, regional, and national level.

Our expansive services include Website Design, SEO, Social Media Marketing, Local Business Listings, Pay-Per-Click Advertising, Print and Collateral Design, Media Relations, Strategic Marketing Planning, TV Production, and Reviews and Reputation Management. Whiteboard Marketing helps dentists grow their practices.

The Dental Marketing Landscape

Today's practice marketing landscape is constantly changing, but it is here to stay. Understanding the true purpose of building an integrated and proactive marketing program for a dental practice is a vital component of attracting new patients and driving practice revenue.

This workbook will focus on how to develop and implement strategic, comprehensive, and sound marketing processes into your practice.

In many cases, dentists leave practice marketing seminars with outstanding ideas that can truly change their practice landscape. But, without an actionable map to carry out the strategy, the ideas stay just as they are – concepts, not actions. Our goal is to empower dentists and practice marketing managers to not only build a marketing program that is “right” for your practice, but to leave with a tactical map of how to implement your marketing strategy on a realistic, day-to-day level.

Learning to market your practice effectively will not only bring in new “quality” patients, but it will help turn your existing patient base into practice ambassadors.

IDENTIFY YOUR MARKETING GOALS

What do you want your marketing program to do for your practice?

Essentially, what are your marketing goals?

Goal	Rank in order of importance (1 = most important)
Build brand and awareness within the local community	
Bring in more new patients	
Increase recall patient appointments	
Drive referrals from current patients	
Increase referrals from my referring dentists (for specialists)	
Incrementally grow the existing patient base	

BRANDING AND MESSAGING

Understanding your current brand, voice, and unique qualities will help identify how you present yourself and your practice to current and prospective patients.

Do your logo, tagline, and brand colors reflect your brand?

Explain why or why not. What would you change if you could?

What do you want your patients to say about you?

What do you think makes you different from other dentists in the area?

Include services, patient relationships, certification, technology, etc.

What do you want your “voice” to sound like?

Do you want to sound professional? Caring? Friendly?

UNDERSTAND YOUR PRACTICE

Where are your new patients coming from?

	Rank your greatest source of new patients (1= most, 10 = least)	How do you track this?
Patient referral		
Staff referral		
Patient reviews		
Google (online search)		
Google My Business (GMB)		
Social Media (Facebook, etc.)		
Print Ads/Direct Mail		
Referral from general dentist (for specialists)		
TV		
Radio		
Insurance Network		
OTHER:		

Who are your patients?

Demographically speaking, what do they “look” like? Identifying your patient demographic will help determine the marketing channels you need to focus on to reach your decision-makers.

Demographic	Comment
% of female patients	
% of male patients	
Kids? Ages?	
Average household income	
Average age	
Describe the community where the practice is located	
In family households, who makes the medical decisions?	
Insurance vs. Fee-for-service patients	
Other factors that describe your patient base:	

What is the first service/treatment/procedure this key demographic group calls your office for or schedules an appointment for?

This service is one of the advertising messages to use in marketing.

List your key services.

List the services that generate the most revenue for your practice. This could include the type of procedure – cosmetic, restorative, CEREC one-visit crowns, braces, dental implants, hygiene, etc. You will want to focus on these procedures and services as part of your marketing messaging.

Dental Treatment/Service	Revenue importance (1 - least, 5 - most)

List the key topics/services/procedures/treatments you want to focus on each month of the year.

What services do you want to promote and what times during the year? What is your business cycle for the calendar year? List the trends for patient visits, questions, seasonal issues to focus on, etc.

Month	Brand Building Service	Sales Building Service/ Treatment/ Procedure/ Promotion
January		
February		
March		
April		
May		
June		
July	Example: back-to-school hygiene appts.	
August		
September		
October	Example: Insurance - use it or lose it	
November		
December		

MARKETING RESOURCES + CURRENT REALITIES

To complete an effective and ongoing marketing strategy, every practice must have some key factors to ensure success. Many of these factors are roadblocks to your current marketing efforts. Identify the resources that are roadblocks and their causes, as well as those resources you can commit to your marketing program. Then, identify who will be responsible for these resources to make your plan come to life.

Resource	A current marketing roadblock Yes/No	Why? Why not?	Will I commit to it? Yes/No	Who will be responsible?
Marketing budget				
Designated marketing person inside the practice				
Third-party marketing partner				
Time during the week to implement marketing				
Knowledge of marketing initiatives				
Training about marketing				
Our marketing is on track				

PLAN IT – MARKETING INITIATIVES

Determine which initiatives you will incorporate into your overall marketing strategy. Identify the resources needed for success and the person/team who will be responsible for implementing the program.

Action	Include in Marketing Strategy Yes/No	Resources Needed (\$, time, team, training)	Responsibility (Who will implement?)
Website (Design, update, keep as is)			
SEO (Search Engine Optimization)			
Dynamic Call + Form Tracking (Track where patients are coming from)			
Local SEO/Google My Business (GMB) (Business Listings Management)			
Patient Reviews (Ask for, post, and respond to reviews)			
Social Media (Facebook, Twitter, GMB)			
Social Media Boosts + Ads			
Google Pay-Per-Click (Digital advertising campaign)			

Action	Include in Marketing Strategy Yes/No	Resources Needed (\$, time, team, training)	Responsibility (Who will implement?)
Blogs (Bi-weekly/Monthly)			
Email Marketing (For patients and referring dentists)			
Print Collaterals (Brochures, etc.)			
Traditional Marketing (TV, radio, print ads)			
Patient Referral Campaign (Internal)			
Enhance Patient Experience			
Internal Graphics (Waiting room, operatory displays, etc.)			
Community Involvement Activities			

MODERNIZE THE PATIENT EXPERIENCE - Patient Accessibility + Conversion

Identify the patient conversion opportunities you will incorporate into your overall marketing strategy. Identify the resources needed for success and the person/team who will be responsible for implementing the program.

Action	Include in Marketing Strategy Yes/No	Resources Needed (\$, time, team, training)	Responsibility (Who will implement?)
Website Chat			
Online Scheduling			
Online Patient Forms			
Online Bill Pay			

ESTABLISHING YOUR PRACTICE MARKETING BUDGET

The industry average for marketing is between 3-7% of your practice revenue. Outlined below is a recommended marketing strategy for each budget category.

6%+	5%	4%	2-3%
Website	Website	Website	Website
SEO	SEO	SEO	SEO
Dynamic Call + Form Tracking	Dynamic Call + Form Tracking	Dynamic Call + Form Tracking	Dynamic Call + Form Tracking
Social Media Management	Social Media Management	Social Media Management	Social Media Management
Facebook Boosts	Facebook Boosts	Facebook Boosts	Facebook Boosts
Online Reviews + Reputation Management	Online Reviews + Reputation Management	Online Reviews + Reputation Management	Online Reviews + Reputation Management
Local SEO / Business Listings Management	Local SEO / Business Listings Management	Local SEO / Business Listings Management	Local SEO / Business Listings Management
Email Marketing	Email Marketing	Email Marketing	Email Marketing
Google PPC Ads	Google PPC Ads	Google PPC Ads	
Social PPC Ads	Social PPC Ads		
Website Chat	Website Chat		
Blog			

TRACK, MEASURE, ANALYZE, ADJUST

I will track my marketing efforts by using the following:

Y/N	Resource	Frequency (We recommend monthly)	Team Members You Will Include
	Dynamic Call + Form Tracking		
	Phone Call Recording + Listening		
	Google Analytics		
	Google My Business Insights		
	Social Media Insights		
	Question on Patient Forms		
	My staff will ask and we will officially record		
	Other		