

Create a marketing plan to jump-start your practice post-pandemic

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Twenty-four years ago – way before healthcare marketing was cool – I made it my mission to help doctors grow their business. I’m a strategist at heart, and have seen first-hand how the internal culture of a practice and the patient experience can be your most powerful marketing tools.

Today's Agenda

High-level look at our plan for the next hour

- Setting the stage
- A little on brand, differentiation & patient experience
- Let the planning begin
- 9 steps to creating your plan
- Set a deadline
- Q&A

CHANGE

C



Today's Healthcare Consumer

Wants healthcare to think and operate more like retail!

- Convenience – they want you to be just as accommodating as their favorite store
- Pleasant interactions and processes that make things easy for them
- Office environments that allow for smooth and convenient patient flow and make browsing and buying easy
- Ability to schedule appointments online or on the phone (options)
- Complete forms ahead of their appointments
- Order contacts with a simple call or visit to your website
- Loyalty programs, incentives and promotions



Brands, Differentiation & Patient Experience

“A brand is not a product or a promise or a feeling. **It’s the sum of all the experiences you have with a company.**”

Amir Kassaei, Chief Creative Officer, DDB Worldwide

“

**Ultimately, brand
differentiation is about
creating value.**

”

Differentiation

It's all about standing out, NOT blending in!

REAL DIFFERENTIATORS



- Worth talking about
- Worth noticing
- Exceptional, new and/or interesting

Differentiation and the patient experience go hand-in-hand

- If you don't have anything truly different already in place, think about ways to push the envelope
- Work through the Patient Experience Worksheet to develop **real differentiators** for your practice

Urban Eye Boutique

- Upscale boutique eye practice
- 1 doctor full time
- Concerned with losing patients to low cost competition in the area
- Vision care plans don't reimburse enough
- Largest demographic: female, 35-54

Potential differentiators:

- Dry eye center of excellence
- Exclusive designer frames

Suburban Family Eye Care

- Primary eye care practice
- 2 doctors full time
- Many practices with similar services in the area
- Wants to offer new services directed at pediatric population
- Largest demographic: children 8-18

Potential differentiators:

- Myopia control
- Back to school headquarters
- Family appointments

Rural Eye Associates

- 2 location primary eye care practice
- 3 doctors full time
- No ophthalmology within a 50-mile radius
- Wants to manage patients' medical needs in house
- Largest demographic: female 55+

Potential differentiators:

- AMD management
- Complete medical eye care
- Advanced treatments and science-based nutraceuticals

Evaluate Your Patient Experience

Think about the first impression from a new patient's perspective

EXTERIOR

- Is the building, parking lot and landscape appealing and inviting?
- Is signage in the right place, clear and helpful?
- Do you feel welcomed?

INTERIOR

- Is it easy for patients to know where to go and what to do?
- What does the waiting room look like?
- How about the exam room and optical shop?

OPERATIONAL

- Is scheduling an appointment simple? Is the check-in process streamlined?
- What does the testing and exam room experience look like?
- Do you make things simple for your patients?
- Are your processes, systems, people and communication aligned to elevate your service offering?

Patient Experience Worksheet

Download the *Patient Experience Worksheet* then convene a team from your practice to dissect the patient experience, from your patients' point of view

AREA EVALUATED <i>(could be physical, people, processes, etc.)</i>	CURRENT STATE	DESIRED STATE	ACTION STEPS <i>(outline the steps for implementing the change)</i>

- Think about **differentiation** as you work through the process
- Work with your team to implement changes together

Patient Experience Idea Starters

Get your creative juices flowing...

PHYSICAL

- Update facility décor (make sure you build it around your brand)
- Improve privacy at registration
- Implement branded attire to be worn by all associates

OPERATIONAL

- Provide a great phone experience (live answer, minimize hold time, friendly staff)
- Obtain ongoing feedback from patients
- Ensure a simple process to schedule appointments

STAFF / COMMUNICATION

- Take personal responsibility for managing the patient experience
- Create a friendlier environment (listen to patients versus ticking off your list of questions)
- Thank the patient for choosing your practice
- Learn at least one personal detail about who you are treating

**“Patient experience is
everything we say and do
that affects our patients’ thoughts,
feelings and well-being.”**

Mark Rudolph, MD, Society for Hospital Medicine Patient Experience Committee

Let the Planning Begin

A marketing plan **focuses on winning and keeping customers**; it's strategic and includes numbers, facts and objectives. A good marketing plan spells out all the tools and tactics you'll use to achieve your sales goals.

Entrepreneur Media Inc.

Step 1 – Practice Overview

Setting the stage for your planning efforts

A brief overview about the current state-of-affairs at your practice. Include major items or changes that have taken place in the past year that should be considered when developing your marketing plan for the coming year.

This might include:

- Staffing changes, including the addition/reduction of team members, changes in roles and/or leadership, etc.
- New technology, equipment or expansion plans (this could include a newly opened facility or the addition of new programs or services)
- Operational and/or service strengths, or areas needing improvement

Step 2 – Data Analysis

Ground your plan with facts

Data analysis includes a concise review of relevant data, important shifts in business and/or relationships, and reporting of consumer attitudes and patient satisfaction. Be sure to include your observations/takeaways related to the data included.

Data to consider:

- Volume & revenue trends (compare the past 2-3 years). Evaluate by department, service or disease states
- Information about your current patient base, including age and gender
- Patient satisfaction results and trends, if you have it
- Payer information (insurance and self-pay) if it might impact creation of your plan
- Patient origin data to understand where current business is coming from and where gaps might exist. For this, you'll need to pull patient zip codes and see how many patients you get from various areas

Step 3 – Market Assessment

Understand your market to uncover opportunities

Market assessment includes a snapshot of where your business comes. It helps you understand the local market, what kind of growth might be occurring, etc.

Information & data to review:

- Major shifts in the competitive landscape (new practices opening or older ones closing)
- Demographics about the market population, growth, age, education level, etc.
- Localized community information, such as new housing communities and what type of consumers they are attracting
- Unique health statistics or issues that affect your market related to eye health (if available)

Resources:

<https://www.census.gov/data.html> – state, county and town level data

State, county and local municipalities all produce and share different types of data

Local media and economic development resources

Step 4 – Competitive Landscape

Know your competition to improve your position

Competitive analysis contains the most relevant information about your top competitors. The information can be gathered from a variety of sources – their website, ads you may have seen, their social media, brochures, etc. Understanding how they position their practice and what their messages are, can provide insight.

PRACTICE NAME

Number of ODs:

Primary Market:

Strengths:

Weaknesses:

Key Messages & Positioning:

Services Offered:

Step 5 – Differentiation



Step 6 – Patient Experience

Step 7 – Key Observations

Draw conclusions, based on your findings from the data analysis, market assessment and competitive analysis, to help you development tactics that support your business building goals.

Step 8 – Goals & Recommendations

Develop SMART goals to set your practice up for success

SMART

Specific

State exactly what you want to accomplish

Measurable

Use smaller, mini goals, to measure progress

Achievable

Make your goal reasonable

Realistic

Set goals that are relevant

Timely

Give yourself time, but set a deadline

- 3-5 goals are achievable
- Each goal should have supporting tactics

Goals & Tactics

Goals – what you are trying to accomplish long term

Tactics – short-term actions and initiatives to support achievement of your goals. The “doing” part of the plan

Example 1: Retention of existing patients post pandemic

Monthly emails targeted at existing patients who are due for regular and follow-up exams

Example 2: Grow medical optometry as it relates to age-related macular degeneration

Announce the addition of dark adaptation testing to existing patients, age 50+, using email messaging

- Tactics need to have target completion dates, person responsible for getting it done and the necessary details
- Goals typically have multiple tactics

Tips for Success

Ongoing marketing and consistent messaging pays off

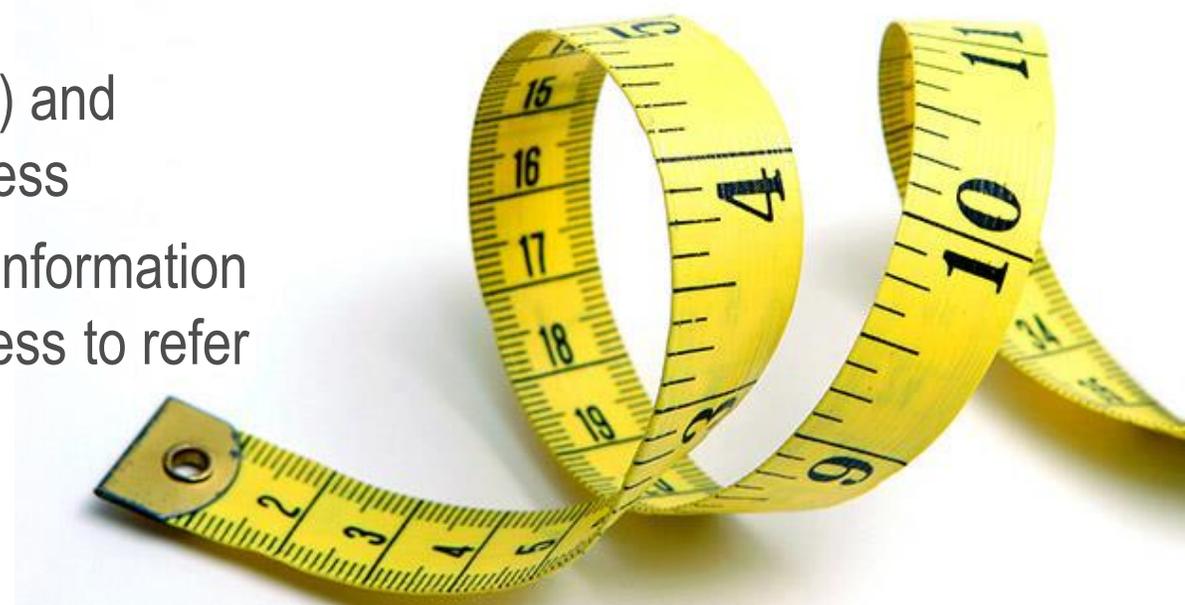
- Ensuring that your message is heard and understood will take an ongoing, **consistent** approach to marketing
- **Repetition** is good & necessary – on average, it takes 6-8 times before someone might remember your message and take action
- Deploy a **variety** of tactics to ensure that your target audience sees your messaging
- Create multiple ways to get in front of your audience, over time, and employ a consistent message that will **resonate** with them

A singular tactic delivered through a single medium won't get the job done!

Step 9 – Plan Measurement

Evaluate the effectiveness of your plan, then modify, if necessary

- Methods and types of measurement vary by tactic
- Some tactics will show direct impact while others are less tangible and require consistent, ongoing tracking to measure results
- Establishing benchmarks (using your existing data) and monitoring growth over time are indicators of success
- Patient satisfaction surveys also provide valuable information related to the patient experience and their willingness to refer



Change Requires Commitment

Don't leave it up to chance



1. Practice Overview
2. Data Analysis
3. Market Assessment
4. Competitive Landscape
5. Differentiation
6. Patient Experience
7. Key Observations
8. Goals & Recommendations
9. Plan Measurement

GET IT
DONE

