# **ANNUAL MARKETING PLAN FOR [PRACTICE NAME]**

# [Date]

**PRACTICE OVERVIEW**

This should be a brief written overview on the current state-of-affairs of 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, such as 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

# **data Analysis**

The data analysis section includes an overview of important numbers as they relate to your practice. This analysis grounds your plan in fact and provides insight into elements that might have changed. The 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.

*Examples of data to consider:*

* Volume & revenue trends, comparing the past 2-3 years. Evaluate by specific departments, services or disease states
* Information about your current patient base, including age and gender (has it changed over the past few years?)
* Patient satisfaction results and trends, if you have them
* 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

**market assessment**

The market assessment section includes a snapshot of your community. Knowing what’s going on locally can uncover business opportunities for your practice.

*Examples of information and 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)

**Competitive LANDSCAPE**

The competitive analysis is a review of your main competitors. It contains the most relevant information about them and the services they provide. The information can be gathered from a variety of sources – their website, ads you may have seen, their social media, brochures, etc. Competitors might include those currently in your backyard as well as those on the fringe of your market who might be stealing business. Understanding how they position their practice and what key messages they use, can provide valuable insight. *Add rows below as needed.*

Include relevant information only, rather than an entire recap of everything the competitor does. Consider areas where you go head-to-head with them, or where they may offer consumers something you don’t.

|  |  |  |
| --- | --- | --- |
| **COMPETITORS** | | |
| **PRACTICE NAME** | | |
| **Number of ODs:** | **Primary Market**: | **Strengths**: |
| **Weaknesses:** | **Key Messages & Positioning:** | **Services Offered:** |
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**differentiation**

Competition is tougher than ever in optometry (locally as well as online), and consumers have lots of choices when obtaining services. The key to capturing customer attention and their business is being able to clearly articulate what makes your practice different. If you don’t know what makes you different, you can’t expect your customers to know. Remember, just providing a service like “optical” doesn’t differentiate your practice. Things like friendly and knowledgeable staff, quality, value and service are expected, so think about specifics that you can leverage.

The key to this section of your plan is to work with your team to identify items that are exceptional, new and/or interesting: the things worth talking about and worth noticing. If you can’t come up with anything truly different that is already in place, think about ways you can push the envelope. Differentiation and the patient experience go hand-in-hand. Work through the exercise in the next section and you might develop actual differentiators for your practice.

**PATIENT experience**

Take time to evaluate your current patient experience. It’s a good idea to start outside of the practice and evaluate first impressions from a new patient’s perspective. What does the building, parking lot and landscape look like? Is signage in the right place; is it clear and helpful? When patients step inside, is it easy to know where to go and what to do? What does the waiting room look like? How about the exam room and optical shop? You only have one opportunity to make a good first impression which can have lasting impact on your brand.

Now, take a look at the clinical experience. Think about every touch point, from scheduling to check-in; the exam room experience, testing, optical shop and check-out. Do you make things simple for your patients? Are your processes, systems, people and communication aligned to elevate your service offering? Remember, your patients don’t understand how healthcare works; they often don’t know how their insurance works, and they rely on you to guide them through a pain-free experience and memorable experience.

Download the ***Patient Experience Worksheet,*** then convene a team of staff members to dissect the patient experience from your patients’ point of view. The worksheet includes space to list the area being evaluated, its current state, future state, and what action steps need to be taken to make it better for your patients.

The following idea starters can jump-start the dialog with your team but encourage them to come up with their own creative ideas. While working through this exercise, think about *differentiation* and what you can do to create a more remarkable patient experience – then work to implement them together.

*Physical*

* Update facility décor (make sure you build it around your brand)
* Improve parking
* Improve signage (exterior or interior)
* Offer handicapped-accessible doors
* Improve privacy at registration
* Improve waiting room flow and design
* Implement professional, branded attire for all associates

*Operational*

* Streamline registration process
* Monitor and improve wait times (be respectful of patients’ time)
* Provide a great phone experience (live answer, minimize hold time, friendly staff)
* Obtain ongoing feedback from patients (formal surveys, or simply spend time talking to patients in the waiting room)
* Ensure a simple process to schedule appointment (including how staff interact with patients)

*Staff / Communication*

* Take personal responsibility for managing the patient experience
* Be the patient’s advocate
* Create a friendlier environment (listen to patients versus ticking off your list of questions)
* Make a personal connection through eye contact
* Provide patients with information on how to reach you in case of an emergency
* Thank the patient for choosing your practice
* Learn at least one personal detail about who you are treating – it shows that you care about them as a person

**KEY OBSERVATIONS**

After careful review of the information from the data analysis, market assessment, and competitive analysis, you’ll be able to draw several conclusions. These conclusions will help guide the development of your strategies and tactics in support of your business-building goals.

**GOALS & Recommendations**

The following goals are recommended based on review of the information above. For an annual marketing plan, 3-5 goals are sufficient and achievable. Each goal should have supporting tactics. Goals could be broken into various categories such as: volume/revenue growth for certain areas of the practice; patient retention, awareness & satisfaction. The table below can be expanded to accommodate the number of goals and tactics you’ve outlined.

Ensuring that your message is heard and understood requires consistency. This can be accomplished by implementing a variety of tactics to support growth for the overall practice, or specific programs and services. This is referred to as layering. Think about multiple ways to get in front of your audience over time and employ a consistent message that is specific to that audience. A singular tactic delivered through a single medium won’t get the job done.

**DEFINITIONS**

***Goals*** – what you are trying to accomplish **long term**

*Example 1:* Retention of existing patients post pandemic. (You have data to support the current state, so include that in your goal – that way, you’ll know when you’ve accomplished it.)

*Example 2:* Grow medical optometry as it relates to age-related macular degeneration. (Again, your data will support what you currently do for AMD, which will be used as your baseline. Set a number goal.)

***Tactics***– the **short-term** actions and initiatives to support achievement of your goals. In other words, tactics are the “doing” part of the plan.

*Example 1:* Monthly emails targeted at existing patients due for regular and follow-up exams. (Given the state of your practice post pandemic and how you re-open, this could be a viable tactic.)

*Example 2:* Announce the addition of dark adaptation testing to existing patients age 50+, using email messaging. (Just one of many tactics that could support goal 2.)

|  | **Target Date** | **Responsible Party** | **Implementation Details** |
| --- | --- | --- | --- |
| **Goal 1:** | | | |
| Tactic |  |  |  |
| Tactic |  |  |  |
| Tactic |  |  |  |
| **Goal 2:** | | | |
| Tactic |  |  |  |
| Tactic |  |  |  |
| Tactic |  |  |  |
| **Goal 3:** | | | |
| Tactic |  |  |  |
| Tactic |  |  |  |
| Tactic |  |  |  |

**PLAN measurement**

Developing measurement standards for your plan and tactics will help you evaluate effectiveness. The methods and level of measurement will 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 will be good indicators of success. Patient satisfaction surveys also provide valuable information related to the patient experience and their willingness to refer others.

Each goal should have some tracking component and should appear as listed above, along with the measurement and time frame. Make sure that what is written here is **actually measurable**. Include what you will do to measure as well as how it will be accomplished.

*Example:* Obtain monthly reports from EHR related to dark adaptation testing (goal 2 above).

|  |  |  |
| --- | --- | --- |
| **Goal Measurement** | | |
|  | **Benchmark** *(existing data and starting point)* | **Measurement** *(data at desired time frames)* |
| **Goal 1:** |  |  |
| **Goal 2:** |  |  |