



## Marketing Samples | Workbook & Calendar



## Plan of Action

The purpose of creating your marketing plan is to outline a strategy for attracting and retaining patients. A marketing plan allows for the best strategy to build your marketing calendar. Developing a marketing plan will assist you in brainstorming what makes your practice unique.

**Step 1:** List 5 challenges that your practice faces. Examples can be found in the sample marketing plan on page 3.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Step 2:** List 5 opportunities in your practice. Examples can be found in the sample marketing plan on page 3.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Though marketing strategies and objectives go hand in hand, the two concepts are unique. Marketing objectives are the goals of a business’s marketing campaigns. Strategies provide the blueprint on how to achieve the objective.

**Step 3:** Take each of the above challenges and opportunities and develop an objective statement that is time-bound, detailed, and measurable. Be specific about your goals and what you need to do to reach them.

Using the worksheet on the following page, begin this process by creating an objective statement and developing corresponding strategies. For example: “We will develop phone scripts and a method of tracking shoppers,” or, “We will train all staff and role play once a quarter.” Examples can be found on page 4.

Stay informed and connected!





# Marketing Objectives & Strategies

**Objective:** \_\_\_\_\_

*Deadline:* \_\_\_\_\_

*Strategies:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Objective:** \_\_\_\_\_

*Deadline:* \_\_\_\_\_

*Strategies:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Objective:** \_\_\_\_\_

*Deadline:* \_\_\_\_\_

*Strategies:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Objective:** \_\_\_\_\_

*Deadline:* \_\_\_\_\_

*Strategies:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Objective:** \_\_\_\_\_

*Deadline:* \_\_\_\_\_

*Strategies:*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Stay informed and connected!





## Sample Marketing Plan 20(XX)

### Challenges:

1. Large local factory closings
2. Commercial competitor low price marketing
3. Losing patients to MDs or other private practices
4. Losing VSP patients to other providers
5. Not seeing many kids
6. Decrease in number of new patients
7. Lack of turnover in plano sunglass inventory
8. Low multiple pair sales
9. Losing contact lens prescriptions to online or phone order services
10. Starting cold in a new location

### Opportunities:

1. Two-year Eyewear Warranty
2. Guaranteed CL Success Program
3. Prescription Accuracy Program
4. Experience of staff
5. Corneal Refractive Therapy
6. Technology
7. Vision Therapy
8. Website for education
9. Unique frame lines
10. Great location with visible signage

Stay informed and connected!





## Sample Marketing Objectives & Strategies

**Objective:** Increase number of number of new patients to 33% of total patients.

*Deadline:* 2-3 months

*Strategies:*

1. Contact area businesses to promote Vision Benefits Program
2. Implement Share the Care Referral Program
3. External Marketing

**Objective:** Increase Shopper Conversion

*Deadline:* Immediately

*Strategies:*

1. Develop phone scripts and tracking method for telephone shopper conversion
2. Role play quarterly at staff meeting
3. Observe Dr.'s exam so we can better understand our own services

**Objective:** Increase Percentage Booked

*Deadline:* 2-3 Months

*Strategies:*

1. Implement pre-appointing
2. Confirmation calls and Reactivation
3. Increase patient loyalty through living and sharing our mission

**Objective:** Increase multiple pair sales

*Deadline:* 2-3 months

*Strategies:*

1. Proper use of the Welcome Form
2. Educate patients on the benefits of a second pair—function & lifestyle in wait area
3. Encourage doctors to give multiple functional recommendations in the exam room with a smooth baton pass to the optical

**Objective:** Reduce number of patients taking their contact lens prescriptions

*Deadline:* 2-3 months

*Strategies:*

1. Add eCommerce capabilities to our website
2. Educate patients about Guaranteed Contact Lens Success Program—advertise it!
3. Office brochure – 10 Reasons to Purchase Your Contacts from Advanced

Continued on next page

Stay informed and connected!





## Sample Marketing Objectives & Strategies

**Objective:** Increase children's exams

*Deadline:* 2-3 months

*Strategies:*

1. Educate parents/grandparents in the office about the importance of children's exams
2. Quarterly newspaper ads about children's exams before, during and after report cards come out.

**Objective:** Increase patient perception of high level of medical care

*Deadline:* Immediately

*Strategies:*

1. Set up lunch w/ophthalmologists to discuss co-management. Report to them after referral
2. Use of website! Refer patients to it for medical information at the end of their eye exam
3. Technology

**Objective:** Educate patients about our move

*Deadline:* 2-3 Months

*Strategies:*

1. Send postcard to all active patients about the move and all the exciting changes in the practice
2. Internal signage before the move
3. Plan a grand opening

**Objective:** Inform community about the new practice

*Deadline:* 2-3 months

*Strategies:*

1. Put up external signage prior to opening, including new website
2. Arrange a ribbon-cutting ceremony
3. Telephone training for all staff to properly inform all callers about the move and convert shoppers
4. Offer family exams to all new patients upon appointment scheduling
5. Share the Care Referral Program
6. Get involved in the community at every opportunity! There is no substitute for networking.

Stay informed and connected!





# Marketing Objectives & Strategies

If applicable, list all of your current internal and external marketing endeavors including advertising, promotions and events. Indicate month or date if known.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

List other advertising and marketing ideas that you might be excited about incorporating in your practice. (Examples can be found on page 9.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

List your involvement in community activities and organizations.

1. \_\_\_\_\_  
Involvement: \_\_\_\_\_
2. \_\_\_\_\_  
Involvement: \_\_\_\_\_
3. \_\_\_\_\_  
Involvement: \_\_\_\_\_

**Example:** Chamber of Commerce—meets first Monday of each month.  
*Involvement: Will attend each meeting. Network and participate in a minimum of three activities.*

List your current speaking events with location, date, time and contact person.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Example:** Iron Gate Assisted Living Center: 1/05/08, Mary Smith, 555-5555; 30 minute presentation on glaucoma awareness.

Stay informed and connected!





## Marketing Calendar

Marketing your practice is more likely to get done when you identify what you want to do and when you want to do it. The next step is to transfer your ideas to a marketing calendar. The best marketing campaigns are planned in advance and benefit from the use of a marketing calendar. A marketing calendar will keep you on track and prevent a “feast or famine” effect, because there will be no lapse in your marketing efforts, and will avoid reactive marketing, which is costly and not as effective.

**Step 1:** Review the media options for your area.

- Newspaper
- Broadcast Television
- Cable Television
- Radio

**Step 2:** Develop a marketing budget. Allocate funds from your operating budget to cover costs associated with marketing your practice. Your marketing plan will encompass everything. Our recommendation is 2 – 8% of your yearly revenue.

***Projected Costs for this Year:***

- Printing: \_\_\_\_\_
- Advertising: \_\_\_\_\_
- ½ of Postage: \_\_\_\_\_
- Donations: \_\_\_\_\_
- Contingency: \_\_\_\_\_ (Recommended amount = \$500/doctor)

**Step 3:** Prioritize the objectives you listed and transfer the marketing campaigns to your marketing calendar. A sample marketing calendar can be found on the last page of this packet.

**Step 4:** List other advertising and marketing ideas that you might be excited about incorporating in your practice. Determine what you think might work the best and when. Use these ideas to smooth out the peaks and valleys. Both internal and external marketing endeavors should be noted on your calendar. Examples can be found on page 9.

Continued on next page

Stay informed and connected!







## **Marketing Calendar Continued**

**Step 5:** Send the rough draft to your Williams Group consultant. Don't forget to set a deadline for completion!

**Step 6:** Present a copy of the draft to the Doctor.

**Step 7:** Make any necessary revisions to your marketing calendar and present a copy to all staff so that everyone is aware of marketing efforts for the year.

**Step 8:** Set a date to revisit your marketing plan and calendar each year, as well as a deadline for when you want to have your budget and plan in place for next year. Example: November 1st of each year would give you sufficient time to plan for the next year's marketing campaigns and get everything in place for Quarter 1 marketing.

Stay informed and connected!





## Advertising & Marketing Ideas

- Open House/Grand Opening
- Frame Show
- Introduce New Associate
- New Trade Name
- Medical Optometry
- Vision Therapy
- Back to School
- Commitment to Community
- Sports Vision
- Bifocal Contact Lenses
- Corneal Refractive Therapy
- Lasik Open House
- Sunwear/Polarized Sunglasses
- Flexible Spending
- Yellow Pages
- Technology
- Vision Benefits Program
- Website
- Newsletters
- Reactivation
- Referral Enhancement Program
- Two-Year Frame & Lens Warranty
- Guaranteed Accuracy Commitment
- Guaranteed Contact Lens Success Program
- Monthly Payment Options
- Office Brochures
- Eyewear Packages
- On-Hold Message
- Community Speaking & Involvement
- School Nurse Program
- Scholarship Program
- Internal Signage
- Phone calls to patients after picking up eyewear
- Investigate co-op advertising

Stay informed and connected!





# Sample Marketing Calendar

Marketing Calendar											
JANUARY		FEBRUARY		MARCH		APRIL		MAY		JUNE	
Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0
Website	\$0	Website	\$0	Website	\$0	Website	\$0	Website	\$0	Website	\$0
Recall	\$0	Recall	\$0	Recall	\$0	Recall	\$0	Recall	\$0	Recall	\$0
Donations	\$0	MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0
MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0
New Year New Look	\$0	Health Club Push	\$0	Contact Lens Campaign	\$0	Trunk/Sunglass Show	\$0	UV Education	\$0	Eblast	\$0
				3pt contact Lens Brochure		UV Education		UV Education		UV Education	
First Quarter Campaign						Newsletter					
Scholarship program						Second Quarter Campaign					
Newsletter						Merchandise for Prom/Wedding Season					
Total	\$0.00	Total	\$0.00	Total	\$0.00	Total	\$0.00	Total	\$0.00	Total	\$0.00
JULY		AUGUST		SEPTEMBER		OCTOBER		NOVEMBER		DECEMBER	
Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0	Yellow Pages	\$0
Website	\$0	Website	\$0	Website	\$0	Website	\$0	Website	\$0	Website	\$0
Recall	\$0	Recall	\$0	Recall	\$0	Recall	\$0	Recall	\$0	Recall	\$0
MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0	MOH	\$0
Back-to-School	\$0	Back-To-School	\$0	Letters to Specialists	\$0	Fall Frame Event	\$0	Medicare/flex Spendin	\$0	Share the Sight	\$0
				Folders/Visit		Girls Night Out				STS Internal Signage/Gift Cert.	
Newsletter						Fourth Quarter Campaign					
Third Quarter Campaign		Sports Vision				Medicare/Flex Spending					
Total	\$0.00	Total	\$0.00	Total	\$0.00	Total	\$0.00	Total	\$0.00	Total	\$0.00
Total Marketing Budget			\$0.00								
Contingency			\$0.00								
Annual Marketing Cost			\$0.00								
Over Budget/Under Budget			\$0.00								

Anniversary Event/Open House tie in or separate event depending on date

Stay informed and connected!

