



Marketing Checklist
**FOR MEDICAL AND
DENTAL PRACTICES**

For Medical Professionals and Practice Managers

What You Should Know Before Investing in a Marketing Plan

You have countless online and mobile marketing outlets options to choose from. But you also have as many demands on your time as ever. That's why it's essential to understand what you need to launch a marketing program and how each step benefits your business.

This checklist gives you a quick introduction to each primary marketing outlet. You will learn how different marketing approaches work, why they deserve your attention, and what to expect if you pursue them.

Know Your Customer (and Yourself!) Before You Start

What to know

Step one of brand positioning is understanding the connection between what you offer and who your customers are.



Why think about it

The better you know your customers, the more precisely you will be able to tailor your marketing to reach them. Knowing your customer helps you and your vendors stay on track with every step of marketing from web design to analytics.



How to do it

Tackle this step by asking yourself some focused questions to clarify your customer base, their needs, and their habits. Consider the following:



- **Who are your customers?** There are probably many answers to this question. Perhaps they are women in their 40s. They may be stay-at-home moms or professionals with a greater expendable income. Who they are will determine what they seek and how they match up with your services.
- **Where do they go for research and fun?** Your customers read magazines, take vacations, join clubs, support organizations, and sign up for new activities regularly. By discovering their interests, you can more easily align with their needs and passions.
- **How do they shop and buy?** Some people take two weeks of research before purchasing a product or service, and some people take two years. It is beneficial to determine if your clients shop around and if they seek in-person or online consultations.
- **Who influences their decision-making?** In addition to family and friends, these influences can include online forums, research, prominent authors, and thought leaders.

- **Which competitors do they look at?** You hear about losing business to certain competitors time after time. Knowing the play field and all its competitors helps you better position yourself for clients.
- **What makes your product or service different?** How you distinguish yourself from the crowd makes all the difference with your customers. Your job is to figure out how best to communicate your unique approach to your clientele.

As you answer these questions, you can start to get a clearer sense of your audience. This helps fine-tune your message and your message channels, so you can effectively stay in touch with customers every day.



What to expect

Once you know your customers' needs and habits, you can expect to reach more of them at a quicker pace and to convert them to paying clients at a lower cost to you. This is an area of continuing inquiry, so as your customer base grows, you will want to regularly evaluate who they are and how they interact with your practice.

Let us help you create customer profiles for your practice. We create two to five profiles that we deliver on poster board to your practice. Contact us for a free 30-minute consultation: (206) 295-2973.

Your Business Website



What to know

Your website is like your business card, except you can hand it out 24 hours/day to everyone with access to a computer, tablet, or Smartphone. As the face of your business, the site should clearly communicate who you are, what you offer, and how a customer moves forward in choosing you.



Why think about it

Your website shows your potential customer that you are professional in your approach, serious about what you do, and invested in their questions about available services. It offers them an around-the-clock way to connect with you in a format that is both simple and convenient.



How to do it

Having a website is a must, but you do not need to spend a fortune creating one. Professional website designers are readily available and can save you valuable time in getting a sharp site up and running. You can also manage this step yourself if you have the bandwidth to take it on. Whichever path you choose, make sure that the site speaks clearly to your customer.



What to expect

With a strong website, you can expect more inquiries from customers seeking your services. Your site will also help you implement other online marketing programs that, in turn, increase site traffic and customer contact. The site will require regular maintenance and changes in content as your business grows.

Thinking of updating your website? Is it time to change your website to a responsive design to reach mobile viewers? We can help you. Email us at info@hdmedicalmarketing.com or call us at (206) 295-2973.

Google Analytics

What to know

Google Analytics is a free service that gathers information about how many people visit your website, which sites or search engines they came from, where they clicked while on your site, how long they stayed, and more. These factors help you determine where to advertise and evaluate how your site is working.



Why think about it

Invaluable information for no cost, Google Analytics helps you better understand who shops your business online and how they do it. Small business owners have not always had access to this data, so this is a great time to take advantage of it and avoid spinning your wheels with ineffective content.



How to do it

Get a Google account or use your existing account. Then visit Google Analytics at <http://www.google.com/analytics/>, where you will be guided through the process of setting up your account. If you have a vendor who is managing your website, your search engine optimization, or your pay-per-click ads, request to add Google Analytics setup and regular reporting to your services.



What to expect

Feedback on your site's usage gives you more insight into your customers, which helps you decide how to adjust your site's structure and content. Doctors typically find, for example, that photos and prices are the most popular pages on their sites. As you learn what pulls visitors in and keeps them, plan to refine your site for improved success.

HD Medical Marketing initiates and evaluates Google Analytics for our customers. We also work with existing vendors to ensure clients are tracking important data to make strategic decisions. For more information, contact us at info@hdmedicalmarketing.com or call (206) 295-2973.

Search Engine Optimization



What to know

Having a strong website for your business is only half of the online equation. You also need to maximize Search Engine Optimization (SEO). Effective SEO ensures two things: (1) that Internet indexing programs (called spiders) are finding your content, and (2) that you are creating content your customers find relevant and helpful.



Why think about it

The purpose of Search Engine Optimization is to make your website easier for potential customers to find when they search for services and information. After the initial cost of hiring a vendor to maximize your SEO, this is a cost-free way to increase traffic to your pages.



How to do it

To maximize SEO, you must have a clear sense of your services as well as who your customer is, what they research, and what motivates them to buy. Bringing these issues into focus will help you create content your potential clients want to read, view, share, and comment on. That, in turn, will improve your search ranking and drive traffic to your site.

Search Engine Optimization has grown easier to do on your own, but hiring an expert is a good use of your money and a better use of your time. Experts can help streamline the connection between content and page titles, page descriptions, meta descriptions, and more. They can also monitor your natural ranking on Google in the keywords that matter most to your practice.



What to expect

With strong SEO, you can expect to have all your site's pages streamlined and appropriately described for search engine spiders. You can also receive a monthly report showing your site ranking for particular key terms. Over the long term, your goal is to get your site onto page one of Google and of your monthly report. Continued use of Google Analytics and fresh content will get you there.

We are big believers in a content-rich website. We can help you with short-term and ongoing SEO practices. Contact us for a free analysis of your site, including your page rank for keyword terms: info@hdmedicalmarketing.com or call (206) 295-2973.

Video

What to know

Current data shows that YouTube is the second most frequently used search engine on the web and has more users than Facebook (thus the largest social media network). People who watch demo videos are 89% more likely to buy the product and 96% more likely to click on the email. More importantly, online video is the fastest growing marketing medium in the history of the world and is recognized by Google as valuable content.

Considering these factors, connecting with clients through video content is an essential and compelling piece of marketing today. Videos help businesses grow, of course, by reaching new customers and introducing them to your business. But they are also a useful tool in trimming the time and expense associated with customer service. For example, videos featuring doctor Q&A's or FAQ's with nurses regarding office procedures or after-care are useful ways of connecting with current customers 24-hours/day.



Why think about it

More than 1 billion unique users currently visit YouTube each day. Videos are shared 12 times more frequently than links and text posts combined. Thanks to its appeal and growing popularity, this accessible marketing video strategy offers you a direct and effective way to build unique relationships with potential patients. Doctors across every specialty are incorporating video, so jumping into video yourself is essential to ensuring your patients stick around.



How to do it

There are several options for creating marketing videos. Production costs range from thousands of dollars if you hire a professional studio down to nothing if you take a DIY approach with your desktop, tablet, phone, or video camera.

To prep for the world of video, ask yourself a few questions:

- ✓ Why you are making the video?
- ✓ Who is your audience?
- ✓ What stage of the purchase process are they in (research, decision-making, post-op)?
- ✓ How will you use the video (website, YouTube, social media, email, treatment guides, etc)?

Once you have answered these questions, you can put together a strategy that will achieve your goals and guide you to the best production approach, whether you hire it out or self-produce.



What to expect

Once you have a clear idea of what you hope to achieve with your videos, the easier it will be to select the right vendor for production or the right tools to self-produce. Whichever path you choose, you will want to gather material from all parts of your practice. Consider what "before" and "after" photos you can include in the videos, what images of care or service you want to promote, and which patients might be willing to share stories.

Once the video is ready, you will want a YouTube and a Google+ page, if you do not already have them. This step can be hired out. You will also need the ability to embed video onto your website, which may require time from your web developer or SEO vendor. Once the video is out in the world, you can use YouTube's analytics to help determine future video content.

At HD MedicalMarketing, video marketing is our passion. We offer everything from video production, testimonial interviews with patients, and editing, to YouTube posting, optimization, promotion, website and email integration, and reporting and analytics. Contact us at info@hdmedicalmarketing.com for a free 30-minute consultation or call us at (206) 295-2973 to find out about special offers for new clients.

Blogging

What to know

Though much of the recent market has gravitated toward video, blogging is still considered important for creating the content your customers need to make decisions. In addition to helping you reach new clients, blogging is a great tool for connecting with, educating, and updating current

Why think about it

Blogging has been one of the best ways to create new regular content for websites. Search engines are attracted to websites that are engaging and active. Blogging also allows your practice to seamlessly add new content about topics that connect with your audience. New trends, new techniques, new before-and-after stories—these all make excellent material for blogs and content for your website.

How to do it

If you can write the blog yourself, do it. Blogs are not technical white papers, so if you are comfortable writing, it is always going to be more effective and less expensive than hiring someone to do it for you. Another option is to have someone in your office write for you. The closer this person is to your patients, the better. The last resort is to hire out blogging. If you go this route, just be sure you are clear on what your hired writer will cover and what their editorial calendar will be. Be sure to plan to act as the final reviewer of the written material so that all the information accurately reflects your services, philosophy, and approach.



What to expect

Expect to spend 1-2 hours per week writing blog entries and reviewing comments. You will likely see increased web traffic and search engine relevance.

If you are looking for a writer to help you create high-quality blog content, contact us at info@hdmedicalmarketing.com or call (206) 295-2973.

Social Media



What to know

Social media has many uses, but as a member of the medical community you should view it as a tool for building relationships with customers. Popular social media sites include Facebook, Twitter, Google+, YouTube, Instagram, and Foursquare. For medical practitioners, targeted social media groups like RealSelf, HealthGrades, ZocDoc, and RateMD allow you to talk about more personal topics and highlight who you are as a physician and as a practice.



Why think about it

There is ongoing debate about the exact benefits of social media marketing, but it is still important to have a presence. Social media communities are growing daily, so doctors need to be participating in the conversation professionally and have an up-to-date grasp of the social media world. Social media and reputation go hand in hand, so stay current with social media and directories that list you as a medical professional.



How to do it

Start by thinking about what drives your customers to their favorite social media site. They may be seeking entertainment, comfort, connection, good bargains, or information. Consider where your brand best fits in, how you want to relate to your clients, and what you expect to receive in return.

Next, Google yourself and your practice to see what profiles already exist for you in social-medical communities. Then claim your free profile so you can have control of your name and reputation, and research what your competitors are doing in social media to connect to customers.

At all times, your involvement in social media should be thoughtful and selective. Do not react to reviews, and be cautious about giving time to questions that do not help you reach your audience. Likewise, be especially careful about HIPAA standards as you converse online.



What to expect

Budget approximately 20 minutes per day for keeping up on social media. You will save time if you look for ways to post content automatically across multiple sites. As your participation grows, you can plan to add depth to your content by way of video, blogs, speaking engagements, and Q&A.

We work closely with practices and agencies who manage social media to ensure video is part of the strategy. If you are interested in learning more about social media strategies with video, contact us for a free 30-minute conversation.

Search Engine Marketing (Pay-per-Click)

What to know

It is appealing to think that natural searches and rankings can drive all traffic to your site, but in truth, Search Engine Marketing (also called SEM or pay-per-click) is an essential part of your plan. If you don't use it, and your competitors do, it is almost impossible to grow your customer base effectively and improve business activity.



Why think about it

Pay-per-click advertising puts you in front of potential customers whether or not your site appears on the first page of search. Functionally, it interfaces directly with the effectiveness of your SEO. The more relevant your site is, the better your pay-per-click marketing performs. In turn, Google rewards you for relevance with better placement or better rates.



How to do it

The key to effective SEM is to fine-tune your strategy before agreeing to pay-per-click charges, so that the dollars you spend on clicks are most likely to convert into clients. This takes you back, once again, to knowing who your client is, where they live, and what procedures you offer that they most need. Over time, you can adjust your placement and pricing to ensure you get the necessary return on investment for this marketing outlet.

As with SEO, you can set up SEM on your own, but SEM experts are also readily available for hire and a worthwhile investment. They have access to data and services unavailable to average business owners and can save you valuable time in getting up to speed with available SEM programs.



What to expect

Effective SEM will require up-front planning on keyword strategy and good control over a clean client database so you can target your marketing geographically. Once your campaign launches, plan to review results regularly, looking at click rates, conversion rates, bid rates, and cost-per-lead numbers to optimize your program. In addition, reviewing and testing ad copy and landing pages regularly will help maximize results. As the program pays for itself, plan to increase the amount of your budget you spend on SEM.

For references on who we recommend for PPC advertising, email us at info@hdmedicalmarketing.com or call (206) 295-2973.

Email Marketing

What to know

In recent years, email marketing has replaced the bulk of the direct mail business because it costs less, gets better results, and offers more insight into customers. Email marketing can help you communicate with all or part of your database in one swoop, and it can be easily tailored to particular service offers, seasonal factors, or other aspects of your business.



Why think about it

Email marketing is especially useful for attracting new customers. It is also a powerful tool for retaining current customers, up-selling them to new procedures, and facilitating referrals to new clients. You can also receive feedback from your email campaigns on which specials, offers, timings, and events work well. All of this comes at a cost far lower than for print advertising.



How to do it

Setting up email marketing can be done in-house, but this is a job best handled by a dedicated designer, copywriter, and coder. If your budget does not allow for hiring a team right away, acquire a low-cost DIY program to start building your address list and relationships.

For references on who we recommend for email marketing, email us at info@hdmedicalmarketing.com or call (206) 295-2973.

Note: There are rules that govern email marketing, including how you build your lists. For more information, look at the following reference checklist created by Return Path: http://www.returnpath.com/wp-content/uploads/resource/-can-spam-compliance-checklist/Return-Path-CAN-SPAM-Reference-9_12.pdf. Before you begin, have a firm understanding of these guidelines, or check to make sure your hired experts know them well.



What to expect

Once your email marketing systems are up and running, you will want to track the rates at which customers open your emails and click through to your site. Using Google Analytics, you can also see what links appeal to the people you reach and where they go on your site once they arrive there.

Database

What to know

Your database is a trove of information that helps drive and direct all of your marketing approaches. The cleaner the database is, the better it will work. Maintaining a meaningful database takes regular work and discipline, but you will reap its rewards over and over as it helps you send a clear message to your potential and returning clients.



Why think about it

The more you know about the people you have procured in your database, the better you are able to retain valued customers and cultivate new ones. As a result, you're more likely to reach the clients who matter and reduce your communication expense.



How to do it

You probably have a billing and medical database of current and past clients, but your database can also extend to include prospective customers. Likewise, expanding the categories of information about each client will pay off in higher conversions because you and your patients will be more informed about each other. Data managers are available for hire or you can keep this in-house with a steady investment of your time.



What to expect

Setting up a database takes time and focus so that the program is clean and easy to maintain. You will need to decide how to segment your patients so that communication is most effective and direct. Going forward, you will also need a plan for adding, managing, and updating the information. It is a standard best practice to have limited administration rights to the data, but those who control it should understand how to pull info, update info, and report the impact of email, direct mail, and loyalty program efforts.

If you are unsure if your database is set up to scale, contact us for a free 30-minute conversation: info@hdmedicalmarketing.com or call (206) 295-2973.

We hope this overview gives you a better idea of what is available to drive awareness, new patients and repeat patients. Every one of these tactics can and should work together. We know marketing for medical practices has never been more complicated.

HD Medical Marketing is devoted to creating integrated campaigns that leverage everything you do and create to ultimately build your brand and drive new patients.

For more information from HD Medical Marketing, please visit our website at hdmedicalmarketing.com, or connect with us socially on YouTube, Facebook, Google+, or Twitter.

