MARKETING MEETING | QUICK-REFERENCE GUIDE

DIRECTIONS

Use this quick-reference guide to help you quickly refresh your knowledge of a marketing meeting. More in-depth knowledge about this topic can be found in the **Meetings Course** lesson "**Marketing Meetings**".

ESSENTIAL BASICS

WHAT IS THE PURPOSE?

To review and take appropriate actions concerning the ongoing marketing activities of the practice.

WHEN SHOULD IT BE?

Monthly

WHO SHOULD ATTEND?

The owner, office manager and any staff who are involved with any on-going marketing activities.

MEETING INFORMATION:

Due to the normal 8-10% patient attrition in any practice, you need to have enough new patients coming in to not only make up for this attrition but to increase active patient numbers so that the practice can grow. This meeting is all about ensuring that your office has its basic marketing systems and activities in place and stays on top of them in order to create the required new patient flow for growth. The meeting format covers three areas:

Statistics

Administration

Planning

WHAT INFORMATION TO BRING?

- Notes from your last meeting.
- The office marketing calendar.
- Relevant KPI graphs.
- Any information from marketing tracking systems you may have in place.

TOPICS FOR DISCUSSION:

Statistics

In this area of the meeting, you want to objectively observe the results of your marketing actions. Proper tracking and observation of your marketing KPIs minimize the subjectivity and guess-work that can easily enter into marketing. Take these steps:

1. Review the graphs of all relevant KPIs and the statistical goals you set for the month. You should minimally look at the following KPI graphs and/or information.
   a) New patients
   b) Active patients
   c) The statistics of where inquiries and new patients came from relative to each of your ongoing marketing activities such as referrals, website, SEO marketing, mailers you may have done, etc.
2. Determine if there's any other KPIs you want to review or start tracking. For example, if you are a specialty practice, you should track other KPIs such as:
   a) Active referral sources
   b) Number of referral source contacts by your doctor
   c) Number of visits to offices of existing and/or potential referral sources.
3. For each graph, look for significant changes in any trends, whether up or down.
4. Investigate what happened before the trend change so you can reinforce any positive movement and/or correct any negative change. This may take follow up work to accurately determine what occurred.
5. Determine the actions to be taken to correct and/or reinforce trends.

Administration

This section of the meeting is about looking at the overall administration/management of your marketing activities. Review the following points:

- Allocation of personnel for various steps in different marketing programs.
- Allotting time for participating staff to do their assigned marketing function. For example, if an assistant is helping with a particular marketing assignment, work out when they can wear that "hat".
- Do the people involved have the needed tools to do their assigned actions, such as software, quiet spaces to make phone calls, access to tracking systems, etc.?
- The status of your tracking and report generating systems. Do they need to be created, refined, or added to? It may take a few

meetings to determine what data you need to gather and how to organize it.

- Is the office allocating enough money for marketing (this should be 2-4% of the practice's income)?
- Are you staying within budget?
- Any needed shifts in budgeting allocations from one project to another?
- New or updated budgeting needed?
- Bonus systems for staff who produce new patients.

Planning

Depending on the type and size of your practice, you should minimally have 5 and up to 15 different ways or programs to market your practice. Variety is a key, so that if a particular program isn't working, you have other activities to take up the slack and maintain the needed new patient flow. Each step required to complete each program should have a targeted completion date with it noted on the calendar. The calendar, which should cover the next 18 months, should be reviewed and updated at each meeting.

During the meeting, you should especially look at the various steps that are due to be completed within the next month and make sure you are on top of everything needed to get them done on time. If not, work out the remedial actions to make each happen.

From your earlier review of the statistical trends and the status of upcoming steps on the calendar, determine if any additional marketing activities should be developed to support needed new patient flow. If so, work out the steps to institute and accomplish the additional program/s and appropriately update your calendar.