

Executing and Assessing Your Plan

Now that you've outlined all your marketing plans, you are ready to take the next steps—to determine who will do the work, what systems you need to track and measure the results effectively, how to create a master plan that guides the process, and how to assess the success of your marketing efforts.

Chapter in Brief:

- ▲ *Depending on the size of your practice and your budget, the best team to execute your plan may be a marketing or advertising firm that coordinates specialists. Learn how to pick the right one for you.*
- ▲ *Measurable goals make it possible to evaluate the effectiveness of many campaign elements, such as direct mail responses.*
- ▲ *To achieve your marketing goals, make time to bring all marketing plan elements into one document that gets used and updated continually.*

If all this work to prepare and implement a successful marketing plan seems overwhelming, don't give up. Take time to absorb the information and contemplate which tools and tactics will make the greatest contribution to your goals. Keep in mind that consultants can handle what your practice can't take on with existing or even new staff. This chapter will explain how to determine what you should outsource and how to do it.

If you're in a larger practice, you may have an in-house marketing manager or a client development manager with responsibility for creating, executing, and then measuring your



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marketing plan's impact. If your practice is smaller, you can still do some of the work in-house as long as the people with the right skills have time for it. To determine how much, if any, of the work can be done in-house, review the list of tasks and compare them with staff skills. Some require good systems skills—tracking the source of patient inquiries, for example—while others require good writing skills to put together news releases or edit physician-authored articles for your Website. Still other tasks require someone who is organized and persistent—for

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example, in finding opportunities for local speaking engagements, presenting the speaker and topic appropriately, and following up to secure a booking.

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How to Find a Consultant

The biggest challenge when hiring consultants to execute your marketing plan is that many experts don't offer the broad range of skills and expertise that you need. Most advertising agencies, for example, will assure you they provide a turnkey operation with all the services you need, but in reality agencies tend to excel at one or two things and are weaker in others. Pub-

lic relations tends to be the weak area within advertising agencies; on the other hand, public relations agencies generally don't provide advertising services.

If you are in a large market such as New York, Chicago, or Los Angeles, you're more likely to find firms capable of doing all or most of the work. The solution is to hire a marketing consulting firm that can create the plan and orchestrate its execution, doing some of the work in-house and partnering with subcontractors for specialized components, such as research, direct mail, publicity, or Internet advertising.

The best way to find a marketing consultant for your practice is the same way many of your patients found you: ask people you trust or respect for a referral. Talk to other physicians or business owners in the area who you believe do a good job with their marketing or whose brand image you admire. Ask the marketing staffs at hospitals where you practice.

Look at the Websites of local agencies or consultants to learn more about the options and to determine whether their experience meets your needs. The Website will tell you not only if the firm understands healthcare—look at its portfolio overview and information about clients to get a handle on this—but also about the firm itself in terms of its creativity and how it presents information. You'll learn more if you spend some time clicking around the site to answer these questions:

- How easy is it to find the information you need?
- Do you have a clear understanding of what the agency does?
- Do you know what industries it serves?
- Were you able to read more about the career backgrounds of the top managers?
- Was the type size large enough for you to read, in a legible font, and in a color that didn't strain your eyes?

A consultant whose showpiece communications tool is not user friendly will probably not be able to create the materials

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you need to communicate with your audiences. In short, if you can't get the information you need quickly or easily or can't read it when you find it, you should look elsewhere.

Don't limit your search to local resources because you may not find the experience you need in your backyard. Talk to leaders of the local chapters of national communications groups. (See "National Organizations That Can Help in Your Town," below.) With today's technology, it's easy to work long distance with consultants with expertise in your field. If you're struggling to find a few local sources who come highly recommended by others and whose Websites don't confuse you, ask colleagues in other communities for recommendations.

Making the Selection

Once you have a list of potential consultants, call them, describe your needs, and ask if they would be interested in working with you—not all large agencies may be interested in working with a small primary care office. If they are, send a letter (or e-mail) that outlines your situation and describes what you want. Include as much information about the practice and your marketing needs as possible. For example, you could say you need

National Organizations That Can Help in Your Town

National Websites of most marketing associations will help you find contact information for local chapter leaders who, in turn, can help you find a consultant that meets your needs. Many of those chapters have their own Websites with contact information and other resources. Those organizations include the following:

- **American Marketing Association** (www.marketingpower.com)
- **American Association of Advertising Agencies** (www.aaaa.org)
- **Public Relations Society of America** (www.prsa.org)

Google the group name along with your city and state (e.g., American Marketing Association, Madison, Wis.) to find a local chapter Website. Call the chapter president, explain what you need, and ask for the names of two or three local members who can help you and your team with your marketing questions.

help surveying patients, creating a new image, and developing a Website that will focus on healthcare education. Provide a budget to help them determine if you've set aside enough money

Use a grid to keep track of information and help determine which marketing firm seems most appropriate for your needs. Once you've made a selection, establish a timeline, agree on a budget, and ask your lawyer to review the contract.

for the assignment and if your budget is large enough to interest them in the first place. Some businesses set aside 10 percent of the year's sales figure for marketing, but your practice may need to spend less—or more. A good consultant should be able to offer a range for specific services or deliverables, such as a publicity campaign or a new logo. Naturally, the more help you need, the more you will likely spend; and the larger the consulting organization, the larger their minimum budget requirement will be.

In return, ask each agency to describe its expertise and health-care experience in general (and for your specialty in particular); to outline its staff's professional experience; to provide a current client list; and to explain its fee structure. Discourage any agency from sending you to its Website to find this information. Seek an agency that will make it easy for you to consider hiring it by answering your questions directly. Review the responses to determine which two or three agencies fit your needs, then schedule in-person meetings, allowing about two hours for each. Request that the people who would work on your account attend

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the session and determine if they are fully engaged in the conversation. All of this contributes to the client-agency chemistry—or lack of it.

After each presentation, evaluate the agency or consultant. Use a grid to keep track of information and help determine which firm seems most appropriate for your needs. (See “Marketing Consultant Evaluation Grid,” opposite.) Once you’ve made a selection, establish a timeline, agree on a budget, and ask your lawyer to review the contract.

If you’ve never worked with a marketing consultant before, discuss your expectations. Ask what you can expect from them, compare that with what you’d like, and find a compromise if necessary. For example, your consultant should update you on your project’s status or progress before you even ask. Your consultant should remind you of what information is needed or which document is due back in the approval process.

Consultants often start a new assignment with enthusiasm

Why continue to mail postcards if they aren't generating new patients? The best way to make sure your marketing budget is well spent is to create measurable goals and to develop and implement measurement systems.

only to be disappointed as the weeks unfold because the client isn’t accessible, ignores deadlines, or doesn’t make the necessary introductions within the practice so the consultants can work as part of the practice team. Talking frequently to the consultant at the start of the relationship will help both parties identify potential problems as well as roadblocks and work together to find solutions.

Evaluating Your Campaign’s Effectiveness

Whether you work with consultants or do the work in-house, you need to measure the overall effectiveness as well as that of

Marketing Consultant Evaluation Grid

After each marketing consultant or agency presentation, use this grid to rank your impression according to its importance. Complete the column about the quality or characteristic's importance to your practice before meeting with the agencies; this column will be the same for all of your reviews.

Consultant or Agency:

Quality or Characteristic	How Important is This Quality to Your Practice?*	How Do You Rank the Agency for This Characteristic?*
Agency size		
Overall marketing capability		
Good fit between their skills and your specific needs		
Knowledge of health-care environment		
Whether the agency was referred to you by more than one source		
Your impression of its ability to deliver quality work on time		
Creativity		
Chemistry with your team		
Reputation		

* Rank from 1 (lowest) to 5 (Highest).

individual elements of the campaign to know what works and what needs to change. Why continue to mail postcards if they aren't generating new patients? Do you want to fund a pay-per-click Internet campaign that doesn't make your telephone ring? The best way to make sure your marketing budget is well spent is to create measurable goals and to develop and implement measurement systems.

The new patient intake form that asks where patients heard of the practice can help you assess the value of each tactic, but it's possible to evaluate some of them more specifically.

These systems will depend on the goals and what needs to be measured. Most practices will choose to track new patient referral sources, for example, so they know which tactics are generating inquiries or appointments. Your new patient form could simply ask, "Where did you hear about Dr. Smith?" and list several choices including these:

- Practice Website
- Postcard
- Newspaper article
- Blog
- Twitter
- Radio show
- Advertising
- Friend
- Other doctor
- Hospital
- Insurance

Track this information at least monthly to identify which sources are the most productive. (See "Sample Referral Tracking Form," pp.86-87.) You may decide to invest more in these and less in the sources that aren't generating inquiries.

It's essential for someone on staff to have responsibility for

transferring the “How did you hear about us?” data from each new patient form into a spreadsheet. The spreadsheet will allow you to make comparisons from month to month so you can identify patterns and trends. Was the practice mentioned in a newspaper article? The referral tracking system will let you monitor how long that exposure has an impact on new patient appointments. Did you do a postcard mailing? If you don’t see an increase in new patients who cite the postcard, you might want to re-examine your direct mail campaign.

For example, one of your goals might be to have at least 20 attendees at each educational session you host. If you achieve that goal but have held nine educational sessions and none have generated new patients, figure out why. Is the problem with the presentation content, the presenter, or the concept itself? Evaluating the outcome—whether the sessions led to new patients, for example—will help you make each tactic as effective as possible.

In his book *Physician Entrepreneurs: Marketing Toolkit*, Mr. Buckley says that practices should measure increases in each of the following:

- Net income
- Profitable market share
- Patient satisfaction
- Practice awareness
- Preference for the practice

If your goal is to increase patient satisfaction, you should conduct a second round of research a year after your program started to measure the changes.

The new patient intake form that asks where patients heard of the practice can help you assess the value of each tactic, but it’s possible to evaluate some of them more specifically. Direct mail, for example, lets you code your mailings (if you choose to do more than one) so that you know how many responses you received from each campaign. When you make an offer that

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Sample Referral Tracking Form

A program like Excel will allow you to automatically total the number of referrals from each source at the end of the month. Expand the form to include as many referrals as you receive.

Month: _____

Date	Source	Website	Postcard	Newspaper article or item	Blog	Twitter
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
Totals						

requires patients to return a postcard, it's easy to calculate how many were returned, the income generated, and the return on investment. Similarly, when conducting an Internet advertising campaign using pay-per-click, you will know quickly which of your keywords are leading people to your site.

It's harder to measure the impact of a media relations campaign that generates publicity, particularly when a new patient says that she heard about the practice "from an ad." Similarly, the goal might be to generate 10 new Twitter followers every month, a measurable goal. But it's hard to translate the increased Twitter volume directly into an increase in patients although it might serve to increase the practice's local profile.

mon approach incorporates the elements outlined in Chapter 1 as bullet points:

- A situation or overview (in full sentences, summarizing what you learned from research and how this will trigger any changes)
- Measurable goals that tell you where you need to go and how to know you're there when you get there
- Marketing strategies that guide your approach
- The tools or tactics you will use to implement each marketing strategy including a timeline
- An evaluation section outlining the systems and resources you will use or the steps you will take to measure progress and success

With a marketing plan in place, your practice is on track to see positive changes. Follow the plan, but don't be afraid to shift gears if you discover that one tactic isn't working or is no longer affordable. Monitoring results and outcomes as you move through the process, rather than at the end, will help you make wise decisions that will build a practice that doesn't just survive—but thrives.