

TYPICAL MARKETING PLAN OUTLINE

- 1) **Set Objectives:** new patients, services-per-patient, type, collections, income, etc
- 2) **Define Targets:** age, gender, location, ethnicity, insurance, diagnosis
- 3) **Define Target Desires:** hours, location, insurance, language, skills, reputation
- 4) **Self-Assessment, Competitor Assessment:** differences, similarities, niche
- 5) **Assess the Market:** HMO v. PPO, demand, growing/declining, anticipated changes
- 6) **Determine a Budget:** time v. money, increase desired, % of increased collection
- 7) **Determine Strategies:** Internal v External approaches, message, media (see Ideas handout)
- 8) **Schedule:** production lead-time, seasonality, pacing, delivery dates
- 9) **Execution:** assign responsibilities, engage support services, inform & involve staff
- 10) **Track-Response & Respond:** establish tracking methodologies, track response to identify ROI, edit Strategies and Schedule as needed to improve response

RESOURCES – MARKETING PLAN SOFTWARE/TEMPLATES

OfficeReady Marketing Plans	templatezone.com
Marketing Plan Pro	paloalto.com/ps/mp
PlanMagic 6.0	planmagic.com/marketing_planning.html
PlanWrite for Marketing	brs-inc.com/marketing_plan.asp

RESOURCES - MEDICAL MARKETING BOOKS *All available from Amazon.com*

Marketing Your Clinical Practice, Third Edition by Baum
Marketing Tools for Healthcare Executives by Fortenberry
Branding Health Services by Bashe
Essentials of HealthCare Marketing by Berkowitz
Medical Practice Forms Book by Borglum & Cate