

Sample Concise Professional Marketing Plan

This sample marketing plan for Dr. Pat Smith is intended to provide you with a fictional example of what actually can be created using our Concise Marketing Plan online system.

This simple case is a work of fiction, although it has been based on a DoctorsMarketing dentist subscriber in an existing marketplace. The S.W.O.T. system utilized as a basis for the marketing plan is generic and can be applied to your particular practice. You'll find the situation and solutions given are realistic and natural outgrowths of the Concise Marketing Plan system created.

Pat Smith, D.D.S.

Susan Brown, Marketing Associate

Pat Smith, Owner

Situation Analysis

Pat Smith, D.D.S., began his professional career in 1961. Throughout his career, he has serviced the oral care needs of families particularly in Lake and Culver counties of New Jersey, but has other loyal patients that travel to the practice from more distant parts of the state.

The current office, which was purchased in 1972, is located at 123 Main Street in Brunswick, New Jersey. Main Street is only 1 block from Interstate 26. Interstate 26 is one of the most well-traveled highways in the state and provides easy access to the office from over 20 "demographically pleasing" communities. Travel times for patients in these areas are between 10 and 30 minutes. The spacious office (4500 sq. ft.) is newly remodeled and is recognized as one of the more beautiful professional practices in the community. Currently, part of the space is being reconstructed to have a more "patient-centered" function. When completed, it will be a dedicated state-of-the-art treatment plan presentation/patient consultation room. A highlight of the remaining working space is the gracious reception room. It includes lovely, comfortable individual chairs and sofas, a patient education system, a community bulletin board, ample consumer reading material, as well as targeted dental procedure-related pieces, a desk and telephone for patient use, and a children's area with a variety of toys and books. The décor, lighting, and music in this room and throughout the office have been designed to provide a relaxing patient-centered atmosphere. The entry hall foyer and business area have been tastefully arranged to have a friendly, open look. There are no glass partitions or barriers between the patients and those employees that are serving them. There is also a separate office for the office manager, where she can, if necessary, have private discussions with patients. The walls are decorated with a combination of beautiful pictures, awards, credentials, certificates, posters and community-related photos, such as the little league team the practice sponsors. Even the patient lavatory, which is centrally located, is beautifully adorned and equipped with popular scents, soaps, and pastes to refresh the patient. Fresh flowers are the central theme throughout these areas. In fact, as the patients leave, they are given a flower.

There is also a dedicated infection control/sterilization room which conforms to the latest standards for safety and efficiency. Four operatories for clinical procedures currently exist. One is utilized for hygiene, two for operative treatments, and one for patient examinations and x-rays. A spacious staff/team meeting room is on the lower level.

Over the last 18 months, the practice has invested heavily in high -technology analytical and clinical equipment. Currently available for use are:

- An Intra-oral camera system
- A Kreativ Air Abrasion System
- A Schick Computer Dental Radiology system (CDR)
- 2 Pro-Select Ultrasonic Periodontal Therapy Systems with heated irrigation for fluoride/medicaments for scaling and root planing.
- A Tulsa root canal treatment system.

In addition to the above, the practice has a Panorex X-ray system, a nitrous oxide sedation system, and has computerized most of its patient -related business sections and most recently instituted a totally electronic scheduling system. The telephone system is up to date with a 24-hour voice mail system and a "Message-On-Hold" unit that describes the practice to current and potential patients calling in. The exterior of the building and the landscaping are very well-kept.

The staff at Dr. Smith's practice is made up of a business and a clinical team, all of whom have patient contact. Both teams are under the supervision of the office manager, with Dr. Smith providing input into both areas, but particularly in the clinical section. The business group is made up of the office manager, an appointment coordinator, and an insurance coordinator. The clinical team is made up of two registered dental hygienists and three certified dental assistants. At this time, there are no associate dentists working at the practice. A very positive attribute of the practice team is that their combined experience is over 150 years.

This point nicely distinguishes them from most of their competition and will be a feature in the marketing strategy shown in this marketing plan.

Practice fees have not been formally evaluated, but a review of a current ADA Survey of Dental Fees shows that they are within the "mean" range for practices in the Mid-Atlantic region. No anticipated increases or decreases are planned for this year.

Clinical procedures offered by Dr. Smith and his team reflect solutions to the most often seen patient problems. Dr. Smith has extensive training in all areas of general dentistry. They

incorporate Restorative and Cosmetic dentistry (including dental implants), Endodontic and Periodontal therapy (non-surgical), and Preventive Dentistry. A key clinical goal for the future is to fine-tune the entire team's cosmetic dentistry knowledge and skills for they will be prime factors in their overall success.

Promotion and its related marketing mix components of advertising, publicity and patient communications are at the highest level to date. However, there will need to be further improvement to meet the practice's business objectives. The addition of a very popular newsletter, a full-color brochure, a patient information video tape, CD, or DVD (for referral use), in-office reception room presentations, and an updated telephone message-on-hold, have greatly increased the visibility of the practice. In addition, patient-centered promotional products, plus introductory patient packets and new patient mailings (in conjunction with the local Chamber of Commerce) have shown the doctor's commitment to his current and potential patients. During the second quarter of last year, a very successful tooth whitening promotion was initiated that benefited the St. Jude Children's Hospital. It was introduced via in-office advertising and internal marketing to current patients and a newspaper ad to potential patients.

It had a positive affect on the practice's image and helped attract new patients that were interested in having their teeth whitened at a special reduced price. This promotion will most likely become an annual event because it fits nicely with the cosmetic dentistry focus being developed.

A review of the past and a focus on the future reveal the following:

Innovations, updates, and systems development have placed the practice in its best position to date for increasing the number of new patients attracted annually and, therefore, the total number of patients serviced ... and this can be accomplished without any further investment in the building or extra equipment.

Practice gross revenue from production of \$520,000 has remained constant over the last two years due primarily to fee increases on clinical procedures. The practice has profitability of 28% (\$146,000) before owner's compensation. The new marketing initiative is anticipated to grow gross revenue 39% over the next two years to \$725,000. After clinically related and marketing expenses have been deducted, a net realized bottom line (from the additional

production revenue) of \$131,000 is anticipated. This will increase profit before owner's compensation to \$277,000 or 38%.

The number of new patients annually has decreased from a high four years ago of 200 (17 per month) to a current low of 96 annually (8 per month). This area of new patient referral and attraction combined with the focus on cosmetic dentistry represent the greatest opportunities.

In order to reach the practice's business objectives of increased production revenue and increased net profitability, there are only a few strategies to pursue:

- Increase the number of new patients being attracted, either by expanding the number of referrals, or increasing the amount of external advertising, or both.
- Increase the variety of services being purchased by current patients (interesting them in the benefits of cosmetic dentistry).
- Increase the frequency with which current patients utilize existing services (regular cleaning/whitening treatments).
- Or, increase the longevity of current patients with the practice.

The practice location is ideal for achieving all of the above. Lake and Culver counties are growth areas. Populations have increased to a combined total of 966,327 people within 30 minutes of the practice. 760 dentists service this population for an average of 1,272 patients per doctor. That is slightly below the national ratio published by the ADA of 1,455 patients per active dentist.

Using a conservative contemporary estimate of only 50-60% of the population regularly visiting the dentist, the potential market drops to approximately 700 potential patients per doctor. To greatly exceed this ratio, which is necessary to meet the business objectives and then protect this market share expansion from competition, will take an expanded effort by all involved as well as an aggressive professional marketing plan that is dedicated to accomplishing the objectives.

A marketing services company located in the community – and part of the doctor's professional network – has been contracted to review the current situation and assist Dr. Smith in growing the practice by creating, producing, initiating and following through on strategies and tactics designed to meet or surpass the practice's objectives.

The S.W.O.T. Analysis that follows shows how well Dr. Smith's practice meshes with the requirements listed in this marketing plan.

MARKETING S.W.O.T. ANALYSIS	
Practice:	Date:
My practice's "STRENGTHS" are	My practice's "WEAKNESSES" are
I Distinctive clinical competence.	Missing key staff member for marketing
N Highly experienced staff (over 150 years).	role to create and monitor programs.
T Adequate financial resources.	Community professional "network" needs
E Latest state-of-the-art equipment.	to be nurtured.
R No additions needed for cosmetic dentistry.	Low patient awareness of all of the
N Competitive fee schedule.	practice's features and benefits.
A Easily accessible location with ample	Insufficient new patients monthly.
L parking on-site.	Poorly administered patient referral program.
Attractive building, inside and out.	No formal marketing plan in past.
Well conceived, functional office.	No systems manual.
Consistently profitable operation.	Little, if any, staff experience presenting
Experienced marketing agency.	marketing concepts.
Dedicated staff committed to future growth.	34-hour doctor weekly schedule. May have
	to expand to meet future competitive
	challenges.
External "OPPORTUNITIES" that exist are:	External "THREATS" impacting my practice are:
E Primacy - Dr. Smith has the opportunity to	Likely entry of competition if cosmetic
X step forward and be recognized as the	marketing programs are effective.
T community leader in cosmetic dentistry.	Growing pressures from existing doctors
E Experience factor - Dr. Smith and his team	once Dr. Smith sets the marketing standard.
R have over 150 years combined experience	Potential influx of managed care companies
N which is far more than the competition.	to approach corporations in the community.
A New construction is attracting target audience	
L Above average employment in the state.	
Surrounding area has a stable demographic	
outlook for the future.	
Introduction of a structured marketing plan	
can make practice more effective.	
Lack of external professional marketing in	
community will have patients view Dr. Smith	
as an innovator for his promotional programs.	

MARKETING PREMISE

This year's marketing plan will be focused on positioning the practice in the minds of its current and potential patients as a caring dedicated team of experienced healthcare professionals committed to making the patients' smiles the best they can be.

The primary marketing emphasis will be building patient awareness of the benefits available to them through cosmetic dentistry.

Dr. Smith and the staff have been keenly aware of the growth in the level of patient interest in their smiles for the last five years.

Doctor joined the American Academy of Cosmetic Dentistry and the staff has enrolled in numerous seminars and work sessions on the topic. They are proud of their level of knowledge and experience related to all of the most important procedures. Here are some of the techniques the doctor and his staff employ: Porcelain laminates are thin, custom-made veneers of high-strength porcelain bonded to the front surfaces of the teeth. They are usually used to correct gaps, color, poor alignment, and shapes. Invisible fillings are tooth-colored resins that are bonded in place. New technology has produced stronger resins that can be used in back teeth as well as in front teeth. Old, broken, small silver fillings can be replaced and unsightly gray and blackened teeth can be brought back to their natural beauty. Porcelain bonded crowns or caps use new, high-strength porcelain to eliminate the unsightly gray lines that sometimes show with older crowns. Inlays are porcelain or gold fillings that help restore the tooth; they are made to fit a prepared cavity and cemented into place. They are primarily used when larger fillings are needed. Onlays are porcelain or gold fillings that protect a tooth by covering the chewing surface. Onlays are also recommended when fillings are large. Whitening can be used to lighten most teeth quickly, safely, and relatively inexpensively. Dr. Smith employs an in-home technique utilizing a comfortable, custom-made applicator, plus monitoring in his office to evaluate progress and modify procedures as needed. Fixed bridges fill spaces caused by tooth loss and are permanently cemented or bonded in place. They are attached to strong, healthy teeth on either side of the space. Dental implants are replacement teeth that feel and look just like the patient's own teeth. An artificial tooth root is placed into the jaw, and after a healing period, an artificial tooth is attached to the new root. Dental implants are so natural looking and feeling, patients forget they've ever lost a tooth.

During a focus group session with 12 current patients last September, Dr. Smith had a very rude awakening. In spite of all the efforts the team had made to build their knowledge, skills and equipment (the doctor has all of the latest state-of-the-art cosmetic dentistry equipment), the patients knew very little about the benefits of cosmetic dentistry or the experience and equipment the practice had to offer. The team's most important techniques had become their best-kept secrets. It became obvious that an organized marketing effort would need to be initiated.

Practice business objectives called for an increase in gross revenue and an increase in profitability. Cosmetic dentistry represented the best opportunity to achieve both.

Most of the key tools are already in place. Dr. Smith has all the right patient communication vehicles; they simply have to be integrated for success. That is the role of this marketing plan.

Equally important, will be building a patient-centered attitude among the team members. Everyone will be involved with marketing the benefits of cosmetic dentistry to the patients. Where necessary, training will take place to inform staff members how to assist patients, and also how to increase treatment plan acceptances. The goal of this marketing plan is to achieve the business objectives of the practice by positioning Doctor Smith and the entire practice team as the primary source in the community for cosmetic dentistry. Internal and external marketing strategies and tactics will be focused toward this aim.

Marketing Objectives

Dr. Pat Smith's business objectives from his operating plan are as follows:

1. Mission Statement

To serve our patients and our community by offering uncompromised commitment to place our patients first, knowing they are the most important people in our profession and practice.

To treat each person with dignity, respect, kindness and courtesy.

To develop in our patients an appreciation of our continued efforts to make their smiles the best they can be and improve the quality of their lives.

To grow together as a team through individual dependability, integrity, responsibility and pride in our accomplishments.

To sustain a high level of clinical competence through continuing education, and maintain an environment that fosters our professional and personal growth.

To become the community's first choice for satisfying their cosmetic and general dentistry wants and needs, by positioning Dr. Smith and the team in their minds as a clinically competent, caring and friendly practice founded on the patients trust, confidence and referrals.

2. Business Objectives

- a) To grow gross revenue from production of (\$520,000) 39% over the next two years to \$725,000.
- b) To increase net profitability (before owner's compensation) from 28% to 38% incrementally over the next two years.
- c) To establish the company's position as a clinical leader in the area of cosmetic dentistry and as a professional marketing innovator, both with consumers in the community and also within the industry.

3. Professional Marketing Strategy

To introduce innovative, high profit cosmetic dentistry procedures that will expand our patient base and command positive attention in the community.

4. Professional Marketing Objective

To develop and introduce cosmetic dentistry procedures, as listed in the marketing premise, to smile conscious consumers, primarily in the Lake and Culver counties of New Jersey, utilizing the tactics and tools developed in a structured marketing plan. The result of which will be measured by monthly reviews of the related topics in the practice printouts.

Competitive Analysis

Based on the information gathered, there are unmet consumer wants and needs for the cosmetic dentistry procedures Dr. Smith is offering. There is particular interest in techniques that solve problems related to misshapen, stained or chipped teeth. Currently, even though most practices in the community have the skill and potentially could acquire the knowledge, few have stepped forward and declared themselves (via marketing) to potential patients as the place to go.

Dr. Smith's multi-faceted marketing program should be the first to position his practice in the minds of current and potential patients as a practice dedicated to making their smiles "the best that they can be."

An investigation of local print media, as well as radio and cable advertising, produced no campaigns and only a few scattered ads for dentistry in general, and none dedicated specifically to cosmetic dentistry. In fact, upon requesting practice information from 35 practices within a 25 mile range, only 4 showed cosmetic-related visuals and only 6 assigned a prominent position to it. No brochure featured it as part of the front headline section.

At a weekend health fair at Brunswick Mall in November, Dr. Smith and his hygienist presented their cosmetic dentistry programs to consumers passing by. Dr. Smith utilized his intra oral camera as an attention getter, and also displayed large before and after photos, that he had purchased. Two hundred practice brochures were given out to the general public. Interested consumers (those that the doctor spoke with) were given a special folder containing a letter from Dr. Smith, the practice brochure, a single sheet dedicated particularly to cosmetic dentistry, the patient newsletter, and a copy of the video brochure. Forty-three sets were given out and a total of 4 new patients resulted from the health fair.

It is anticipated that once Dr. Smith begins his marketing program, more doctors will follow. An objective of the marketing plan will be to quickly reinforce the position that Dr. Smith and his team are the innovators and most experienced professionals in the new techniques. The marketing mix is well balanced and scheduled to begin aggressively in the first quarter and then is planned to be evenly maintained throughout the remainder of the year.

Strategic Direction

Overall direction: Develop a complete offering of cosmetic dentistry techniques and procedures. Educate all team members regarding these techniques, and how to properly communicate their features and benefits to current and potential patients. Create a marketing plan which utilizes the most effective tools to properly position the practice in the consumer's mind as the premiere cosmetic dentistry practice in the community. Dedicate practice resources, as much as budget and capabilities allow, to reaching, or surpassing, the practice's business objectives.

TARGET AUDIENCE:

"Smile conscious" consumers are the primary target (across almost all age groups), but with a slant towards active, fitness-minded people, and those whose smile is an important factor in achieving their career goals. Today, the target audience for cosmetic dentistry spans all generations from teens through baby-boomers to senior citizens. As seniors approach their sixties, they have an expectation of an additional 20 years of life, and would like their smile to be the best it can be...and many have money to afford it. It is estimated that over 78% of Dr. Smith's current patients are candidates for cosmetic dentistry. In fact, a review of the target audience within 30 minutes of the practice reveals over 327,000 people fit the profile. This represents an excellent opportunity since the practice is striving to attract an additional 125 patients this year. It is imperative, however, that Dr. Smith begin his marketing plan immediately before other competitive dentists begin promoting to this same target audience.

POSITIONING STATEMENT:

For "Smile conscious" consumers seeking solutions to dental problems related to misshapen, stained, or chipped teeth. Dr. Pat Smith and his experienced team have the skill, knowledge and desire to service current and potential patients' cosmetic dentistry wants and needs...and they're the first practice to present a complete patient education program.

Functional Plans

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) ADVERTISING OTHER _____

Objective # 1 : *Generate awareness of cosmetic dentistry to at least 50% of the potential patients in Lake & Culver Counties. The result of which will be an increase in the number of new patients. (A goal of 20-25 new patients per month is anticipated and will be measured monthly by the marketing audit.)*

Strategy: *Reach smile conscious current and potential patients utilizing the most effective tools in the advertising portion of the promotion mix. Creative impact will be focused on establishing Dr. Smith and his practice as the leading clinician related to cosmetic dentistry procedures.*

Tactic: *Update current advertising tools to reflect cosmetic dentistry focus. These include: Yellow Page ads; reception room CD Systems; patient video brochure; and message on hold. Particular emphasis will be placed on an annual 1,000 column inch of ad campaign in the Record Weekly newspaper, a 13 week spot cable T.V. run, and creation of a website.*

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>Yellow Page Ad</u> Contact marketing agency to design new ad	Pam	2 wks	-	2/1	2/15	
Agency to present 3 ad options by 2/15 Dr. Smith will present options to "patient panel" on 2/23	Pam Dr. Smith	1 wk	-	2/16	2/23	
"Patient Panel" ad selection given to marketing agency. Camera ready ad delivered to telephone company by 3/5	Pam Marketing agency	2 wks	-	2/24	3/5	
Design _____ →			\$350			
Placement 8 months (May-Dec) _____ →			\$5,400			

MARKETING TACTICS FORM (continued)

Practice: Dr. Pat Smith

Objective # 1

Date:

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>Reception Room</u> <u>CD Info System</u> Contact manufacturer to order new cosmetic dentistry category for addition to current system. (Dr. Smith would like to preview first)	Susan Dr. Smith	3 wks	-	2/1	2/22	
New Cosmetic Module			\$200			
<u>Patient Video Brochure</u> Contact Video Concepts Inc. to review generic before and after photos and script for cosmetic dentistry section - will be added to existing 4 minute video	Beth Dr. Smith	3 wks	-	2/1	2/22	
Approved section (by Dr. Smith) will be edited into a new master tape. 25 copies to be delivered by 3/26	Beth Video Concepts	4 wks	-	2/23	3/26	
Module edit/production			\$450			
<u>Message-On-Hold</u> Contact company to review cosmetic dentistry 30 second section to be added to audio tape	Pam	1 wk	-	2/1	2/8	
Ad approved section to tape and have activated by 3/12		4 wks	-	2/9	3/12	
Recording/production of new tape			\$100			

MARKETING TACTICS FORM (continued)

Practice: Dr. Pat Smith

Objective # 1

Date:

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>Print Advertising Campaign</u> Contact marketing agency to create four cosmetic dentistry print ads (7"x9") for the Record Weekly newspaper campaign	Beth Marketing Agency	3 wks	-	2/1	2/22	NOTE: One of the ads to be utilized in April must feature copy emphasizing the "Smile For Life" promotion (3/26-5/28)
Versions of ads to be given to Dr. Smith by 2/19 for presentations to "Patient Panel" on 2/23	Dr. Smith Marketing Agency	-	-	-	2/19	
Agency to complete first approved ad and deliver to newspaper by 3/1	Marketing Agency Beth	1 wk		2/23	3/1	
Creation of 4 ads			\$2,000			
13 Ad placements			\$3,900			
<u>Website</u> Contact Internet Service Provider (ISP) sign-up service and secure URL	Susan	5 days		2/1	2/5	
Monthly hosting service (\$30/month for 8 months)			\$240			
URL registration (2yrs)			\$80			
Review webmasters available, contact associates in study clubs, university, friends in network. Select webmaster by 2/19	Susan Dr. Smith	3 wks		2/1	2/19	
Begin site development with webmaster & practice team (meeting date 2/19)	Susan Dr. Smith	-	-	-	2/19	

MARKETING TACTICS FORM (continued)

Practice: **Dr. Pat Smith**

Objective # **1**

Date:

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>Website Cont.</u> Review photos and copy developed by staff for webmaster completed by 3/12	Susan Staff	3 wks	-	2/20	3/12	Site to be announced to current patients VIA newsletter, URL www.patsmithdds.com added to print materials, video, commercials and message-on-hold
Estimate at least two review meetings and then final site preview approval by Dr. Smith and staff	Staff Dr. Smith Webmaster	4 wks	-	3/12	4/9	
Site live and connected to search engines by 4/19					4/19	
Site creation			\$3,500			
<u>Cable T.V.</u> (30 sec. commercial) Contact C.V.L. to review 3 generic (30 sec.) spots on cosmetic dentistry. To be reviewed by Dr. Smith and "patient panel" on 2/23	Beth Dr. Smith C.V.L., Co.	2 wks		2/5	2/23	
Arrange videography session to tape Dr. Smith for custom section by 3/5	Dr. Smith Beth video editor	2 wks		2/24	3/5	
Edit Dr. Smith's custom section to spot selected, deliver to cable company by 3/12	video editor Beth	1 wk		3/5	3/12	
Generic T.V. spot			\$500			
Dr. Smith custom Section			\$300			
18 wk cable campaign			\$6,500			

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) Personal Selling OTHER _____

Objective # 2 : Primary focus will be on maximizing the receptionist's ability to convert interested consumers into new patients. The result of which will be measured monthly by reviewing actual new patients to the forecast in the marketing plan.

Strategy: To utilize the receptionist as a primary vehicle for increasing the number of new patients. She will be given communication skills training and delegated responsibility for developing an effective new patient tour of the practice and a successful referral program.

Tactic: Develop the receptionist's communication skills via an outside course or consultant, provide assistance designing and scripting a tour of the practice, and develop an effective referral program for use with our current patients and members of Dr. Smith's referral network.

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>Telephone Training/ Communications Skills</u> Investigate courses, and/or consultants that teach communication skills with particular emphasis on telephone techniques. Selected program and/or consultant session should plan to be completed by 4/30 course / consultant sessions	Susan Dr. Smith	3 wks	-	2/1	2/20	
	Susan selected group	9 wks		2/21	4/30	
			\$1,000			
Practice Tour Meet with Dr. Smith and staff to select key points of tour and develop individual mini-bios. complete by 2/19	Susan	2 wks	-	2/1	2/19	

MARKETING TACTICS FORM (continued)

Practice: **Dr. Pat Smith**

Objective # **2**

Date:

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
Have approved script ready by 2/22 for role play with Dr. Smith. First Tour by 2/24	Susan	4 days	-	2/20	2/24	
<u>Telephone Scripts</u> Define top 10 areas of phone discussion and develop mini-scripts to file on 3"x5" cards for use at receptionist's desk. Approved cards (by Dr. Smith) in use by 2/24	Susan	3 wks	-	2/1	2/24	
<u>Referral Program for current patients & members of referral network</u> Investigate other referral programs with members of referral network, associates in study club, marketing agency. Present data at 2/19 staff meeting for discussion and program development.	Susan Dr. Smith Beth	3 wks	-	2/1	2/19	
Develop staff meeting discussion ideas into program. Present to group at 3/22 staff meeting. Program to begin 4/1	Susan Beth	4 wks	-	2/19	3/22	
Cost of gifts and premiums	—————→		\$1,500			
Mailing and Administrative	—————→		\$480			

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) Promotion OTHER _____

Objective # 3 : To review current promotional give-aways to patients, shows/exhibits and planned patient promotions to be sure they reflect the cosmetic dentists theme. To be measured by response of patient panel and actual patient responses during informal questioning during visits.

Strategy: To structure give-aways, show presentations and individual practice promotions to support the cosmetic dentistry marketing objective and, therefore assist in meeting business objectives.

Tactic: Gather and review all items given away. Re-create show display to reflect cosmetic dentistry image. Reinstate "Smiles For Life" promotion to increase practice's cosmetic dentistry image. Build new patients and support St. Jude's Childrens' Hospital.

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
						Particular emphasis should be taken to eliminate extracted tooth images (on current magnets) and to seek cosmetic/ smile related premiums such as mirrors & picture frames.

MARKETING TACTICS FORM (continued)

Practice: **Dr. Pat Smith**

Objective # **3**

Date:

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<p>Investigate changing photos on display to color before and after pictures. Have completed by Brunswick Mall Health Fair 5/8-9</p> <p>Estimated cost of four 20" x 24" color photos</p>			\$1,100			
<p><u>"Smiles For Life" tooth whitening promotion</u> update last years program materials including PR releases, literature and newsletter articles, also add info to website. Utilize new marketing agency and webmaster.</p> <p>Contact tooth whitening company to confirm our participation in this year's program and request product.</p> <p>Contact patients that participated last year and announce this years program.</p> <p>Promotion will end 5/28 all materials should be in house on 3/26.</p> <p>Promotional literature</p>	<p>Dr. Smith Beth Marketing Agency Webmaster</p> <p>Beth</p> <p>Beth</p> <p>Beth Marketing Agency</p>	<p>4 wks</p> <p>1 wk</p> <p>1 wk</p>	<p>-</p> <p>-</p> <p>-</p> <p>\$1,450</p>	<p>2/1</p> <p>3/8</p> <p>3/8</p> <p>3/26</p>	<p>3/1</p> <p>3/12</p> <p>3/12</p> <p>3/26</p>	<p>Include "Smiles For Life" article in first quarter newsletter.</p> <p>Promotion related PR releases and photos should be at news papers ASAP-no later than 2/26</p> <p>Additional "Smiles For Life" costs will be included in particular budgets of other marketing tools.</p>

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) Publicity OTHER _____

Objective # 4 : During the key introductory months of February thru June, generate awareness and positive perceptions among 25% of consumers in Lake and Culver Counties. To be measured by the actual number of press releases that appear in the local media.

Strategy: Public relations will play a major roll in the marketing mix since the exciting features and benefits of cosmetic dentistry are newsworthy to the press. We can also leverage this PR for the entire practice to achieve the practice's business objectives.

Tactic: Develop press releases and photos to be sent to all editors in the print, radio, and cable T.V. media in our target areas. Review patient lists for newsworthy people who might give testimonials on the positive affects they received from cosmetic dentistry. Also, become a sponsor for the Brunswick "Walk for Life" event which has excellent cable T.V. exposure.

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>PR releases</u> Contact marketing agency to prepare 4 press releases-the content, length and related photos to be discussed at a 2/5 meeting.	Pam Dr. Smith Staff	4 days	-	2/1	2/5	Agency should also present Dr. Smith with a proposed schedule of when releases should appear.
First press release to be scheduled for March. Selected topics to be written, approved by Dr. Smith, and submitted to media by 2/19.	Marketing Agency Pam	2 wks	-	2/6	2/19	Press release in April should highlight "Smiles For Life" promotion.
Estimate to prepare press releases and shoot related photos	→		\$1,175			

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) Patient Comm. OTHER _____

Objective # 5 : Building a "consistent" information stream between the practice and it's current patients which will carry important data relating to key cosmetic dentistry procedures which are available to them that they may not be aware of. To be measured by the number of actual communications being sent vs. those projected in this marketing plan.

Strategy: Utilize a consistent patient communications program to reach patients six to eight times annually to reinforce their confidence in the practice. Patients must feel comfortable receiving mail on a regular basis from the practice.

Tactic: A strong letter writing campaign (4 letters per year), newsletters (4 issues per year) and the continuing birthday card program will be foundation of the practice's patient communication program. It is designed to build patient referrals and also increase awareness of the primary practice procedures.

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
Letter Writing Prepare topical letter writing subjects for review by team members at the 3/21 staff meeting.	Beth Dr. Smith Marketing Agency	4 wks	-	2/22	3/22	
Selected "Four" Topics to be written by marketing agency and submitted to Dr. Smith along with a mailing schedule by 5/7	Beth Dr. Smith Marketing Agency	6 wks	-	3/22	5/7	
Creation of four letters			\$425			
Printing of four letters & envelopes (1,500 each topic)			\$565			
Bulk mailing/handling			\$1,395			

MARKETING TACTICS FORM (continued)

Practice: **Dr. Pat Smith**

Objective # **5**

Date:

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<p><u>Newsletters</u> The newsletter program for this year will be reviewed at a meeting at the practice 2/25, attendees will be Dr. Smith and staff as well as a rep from the newsletter company.</p> <p>The subject of the meeting will be adjusting the format of the newsletter to include a section that focuses on cosmetic dentistry. This would be an ongoing column. A potential name might be "The Smile Gallery."</p> <p>In this section, key cosmetic techniques, such as whitening, bonding, and porcelain veneers will be discussed in detail.</p> <p>First issue featuring this new section should be in March.</p> <p>Estimated cost for 4 issues based on last year's actual expenditures (includes design, copy, printing and mailing)</p>	<p>Susan Newsletter Company</p>	<p>1 wk</p>	<p>-</p>	<p>2/8</p>	<p>2/15</p>	<p>The first issue of the newsletter should include an article on the "Smiles For Life" promotion. This will be ideal for the "Smile Gallery" section.</p>
			<p>\$4,300</p>			

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) _____ OTHER _____

Objective # 6 : Increase "patient-centered" marketing awareness of team members in order to increase treatment plan acceptance, as well as being proactive regarding the subject of referrals by current patients.

Strategy: By increasing the staff's involvement with patient contact, we expect to reinforce in the patient's mind our caring nature and dedication to making their smiles the best that they can be.

Tactic: Committing six staff meetings this year to the topic of developing a patient centered attitude, as well as sending our office manager (who makes most of the treatment plan presentations) to a Dale Carnegie course.

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<p>Staff Training Investigation of books, tapes and management consulting groups that are available to provide content for our six staff meetings.</p>	Susan Dr. Smith	4 wks	-	2/1	2/26	Objective #6 has been determined to be a necessary prerequisite for the success of the other objectives, since the staff members' attitudes and their patient communications skills are of primary importance.
<p>Scheduling six staff meeting dates, as well as six meeting supervisors who will present the chosen topics or assist the selected trainers.</p>	Beth Susan Dr. Smith	1 wk		2/1	2/5	
<p>First meeting to begin on 3/23.</p>					3/23	
<p>Estimate of training materials and/or consulting fees for programs.</p>			\$1,500			

MARKETING TACTICS FORM

Practice: Dr. Pat Smith

Date:

PROCEDURES FEES OFFICE STAFF PROMOTION (specify) _____ OTHER _____

Objective # 7 : The image of a cosmetic dentistry practice must be reinforced by the appearance of the office, as well as that of the team members. A "wall to wall" "brick by brick" analysis will be undertaken to find and to correct problems. The result of which will be judged by a patient questionnaire initiated at the end of the second quarter.

Strategy: By maximizing the aesthetic appearance of the practice, we intend to blend the information we are communicating to the patients with the environment they are receiving it in. The goal is to increase their level of trust, credibility, and confidence in our ability to successfully provide cosmetic dentistry procedures.

Tactic: By assigning each staff member to an investigation team, we anticipate reviewing the entire facility, inside and out, from the patient's point of view. All renovations and upgrades will be completed by June 8.

STEPS TO IMPLEMENT	RESPONSIBILITY	RESOURCES		TIMELINE		COMMENTS (ON-TIME? ETC...)
		TIME	\$	START	END	
<u>Facility Investigation</u> Assign each staff member to an investigation team.	Dr. Smith	1 wk	-	2/1	2/8	
Investigation of internal and external areas of the practice. Reports to be coordinated and presented at a meeting on 3/5.	Dr. Smith	4 wks	-	2/9	3/5	
Approved renovations and upgrades (based on available budget) to be completed by 6/8	Dr. Smith	12 wks	-	3/5	6/8	
Budget Estimate			\$1,200			

TACTICS SUMMARY WORKSHEET

Practice: Dr. Pat Smith

Date:

Promotion (cont.)	Annual Marketing Budget												
Patient Communications	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Letter Writing (4 letters)	-	-	-	-	475	490	-	-	490	490	490	-	2,385
Newsletters (4 issues)	-	1075	-	-	-	1075	-	-	1075	-	1075	-	4,300
Personal Selling													
Telephone Training/													
Communications Skills	-	-	500	500	-	-	-	-	-	-	-	-	1,000
Practice Tour	-	-	-	-	-	-	-	-	-	-	-	-	-
Referral Program	-	-	680	980	-	80	-	80	-	80	-	80	1,980
Telephone Scripts	-	-	-	-	-	-	-	-	-	-	-	-	-
Practice Promotion													
Patient Give-Aways	-	900	-	-	-	800	-	-	300	-	400	-	2,400
Show Display	-	-	-	600	500	-	-	-	-	-	-	-	1,100
"Smiles For Life"	-	-	-	-	250	800	400	-	-	-	-	-	1,400
Publicity													
PR Releases	-	392	-	395	-	388	-	-	-	-	-	-	1,175
Monthly Total	-	3,267	5,430	8,255	5,780	7,528	1,740	1,170	2,955	1,660	3,055	1,170	42,010

Following is the budget rack-up summary for each of the functional areas reviewed in the Tactics section of Dr. Smith's professional marketing plan.

Functional Areas Budget Summary

Place (Office Environment)

External Alterations	\$500
Internal Upgrades	\$700
Total Place	<u>\$1,200</u>

People (Doctor/Staff)

Instructional Materials	\$600
Management Consultant Fees	\$900
Total People	<u>\$1,500</u>

Promotion

Advertising

• C.D. System	
cosmetic dentistry module	\$200
• Video Brochure	
cosmetic dentistry module	\$200
- editing/production	\$125
- duplication - 25 videotapes	\$125
• Message-on-Hold	
cosmetic dentistry (30 sec.) script	\$50
editing - formatting new tape	\$50
• Print Advertising	
design four new ads	\$1,500
production of 4 new ads - camera ready art	\$500
ad schedule "Record Newspaper"	
13 ads, (8 mos.) 1,000 inch rate	\$3,900
• Yellow Page Ad	
1/4 page design	\$350
monthly placement charges (May-Dec)	\$5,400
• Cable T.V.	
generic 30 sec. spot (licensing/usage)	\$500
production/editing of 8 sec. custom section	\$300
13 week cable spot campaign	\$6,500
• Website	
URL registration (2 years)	\$80
Internet Provider hosting fees (May-Dec)	\$240
site design and creation (24 pg + 30 photos)	\$3,500
Total Advertising	<u>\$23,520</u>

continued...

Promotion continued

Personal Selling

• Telephone Skills Training Sessions	\$250
• Communications Skills Sessions	\$250
• Sales Trainer Consulting Fee	\$500
• Referral Program	
gift purchases	\$1,500
thank you cards/envelopes	\$80
postage for cards and gifts	\$300
program administration costs	\$100
Total Personal Selling	<u>\$2,980</u>

Practice Promotion

• Patient "Give-Aways" purchases	\$2,400
• Show Display- 4 large format color posters	\$1,100
• "Smiles For Life"- literature	\$1,450
Total Practice Promotion.....	<u>\$4,950</u>

Publicity

• PR Releases	
copy development	\$700
photography - B/W prints.....	\$475
Total Publicity.....	<u>\$1,175</u>

Patient Communications

• Letter Writing Campaign	
create four letters	\$425
printing 4 letters & envelopes (1,500 each)	\$565
folding, stuffing and bulk mail.....	\$1,395
• Newsletter	
design for 4 issues	\$1,200
printing 4 one color issues, 1,500 each	\$1,960
folding, labeling & bulk mail	\$1,140
Total Patient Communications	<u>\$6,685</u>

Total Promotions**\$39,310**

TOTAL BUDGET SUMMARY.....**\$42,010**