

Essential Marketing Checklist



Getting Started

- ✓ Practice Name
- ✓ Domain Name
- ✓ Mission, Vision Statements
- ✓ Patient, Employee Promises
- ✓ Logo Design
- ✓ Define Target Patient (Avatar)

Note: Always set up a way to track return on investment, and mark your calendar to assess ROI quarterly, or at least twice a year. Give marketing opportunities a chance to payoff, and if they do not, cut them out. Set your marketing budget based on the number of patients you want to attract each month. Too low of a budget will not yield the results you want. Keep in mind that marketing takes time to build momentum, especially for a new or faltering practice.

External Marketing

Online Checklist

- ✓ Website – original content, well optimized
- ✓ Blog – 2-4x/month minimum, original content, optimized
- ✓ Google Business – complete listing
- ✓ Online Reviews – Yelp, Google, etc.
- ✓ Backlinks/Citations (NAP) – name, address, phone the same across all internet listings; 50+ listings
- ✓ Third-Party Articles/Backlinks
- ✓ Social Profiles – optimized, postings 2+x/week, linked from website, promoted in office
- ✓ E-newsletter to current patient list, with one-click sharability to social networks and by email

Community Involvement Checklist

- ✓ Dental health awareness opportunities for your target market
 - PTA night speaker; sponsor mouthguards for high school team
 - Realtor event speaker (cosmetic dentistry)
 - Host “Dental Implant Q&A” for senior center
 - Seasonal events: Halloween Candy Buy Back (October), Pictures with Santa (December)
 - Health fair booth at town events, farmer’s market, etc. (make your display coordinate with event – ie: at farmer’s market, dental benefits of various vegetables and fruits – strawberries are a natural teeth whitener)
- ✓ Promote all community involvement (of staff as individuals or group) on social media and website
- ✓ Promote regional, national, and global community involvement (from Crown Council to mission trips)

Print Checklist

- ✓ Monthly newspaper article/ad
- ✓ New patient packet

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- ✓ Quarterly direct mail
- ✓ October: End-of-year benefits expiration letter
- ✓ Welcome Wagon or New Resident mailer/packet
- ✓ Local ad opportunities depending upon target market
 - Billboards
 - Football game tickets sponsor
 - Grocery cart panels
 - Park bench backs



Internal Marketing

Tracking Checklist

- ✓ Calls
 - How did you hear about us?
 - Booked appointment? Attended appointment? Scheduled \$ dental procedure? Insurance, financing, or cash?
- ✓ Emails
 - Source (website, other)
 - Existing or new client?
 - Turn around time for response? Who responded?
- ✓ Social online inquiry
 - Source
 - Existing or new client?
 - Turn around time for response? Who responded?
 - Result?

Collateral Checklist

- ✓ Business cards
- ✓ Appointment cards
- ✓ Letterhead
- ✓ Brochure
- ✓ Post-op instructions
- ✓ Order brochures from third parties you do business with, such as CareCredit, Invisalign, and BioLase. Stamp or sticker them with your practice information.

Posters & Signage Checklist

- ✓ Social media invitations
- ✓ Review us online invitations
- ✓ Promotions for third-party services, such as CareCredit and Invisalign
- ✓ Local school team support – photos, posters, etc.
- ✓ Before and after art

Media Checklist

- ✓ Your website tour on televisions (create video)
- ✓ Review us on tablets/computers

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Staff Training Checklist

- ✓ Personally call patients the day after procedures to follow up
- ✓ In staff meetings, review latest blog post topics
- ✓ “Have you seen our website?” (How to contact us online; our blog on mouthguards and concussions was really interesting – you should check it out; it’s easy to find post op instructions on our website...)
- ✓ Benefits of procedures (Invisalign, Whitening, Lasers, Digital X-rays)
- ✓ Ask for reviews! Personally call and thank for reviews. Send T-shirt.
- ✓ Ask for referrals! Personally call and thank for referrals. Send T-shirt.
- ✓ Contests for staff (most social posts, submitted most blog posts, best patient reviews, mentioned most in reviews, etc.)

Patient Appreciation

- ✓ Contests
- ✓ Drawings
- ✓ Referral thank you T-shirt
- ✓ Achievement celebrations/announcements
- ✓ Give away logo’d T-shirts, dental hygiene products, etc.
- ✓ Promote online with pictures (secure signed authorizations)