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## Tool 1 Marketing Self-Assessment

Directions: Rate yourself 1-5 with 5 being the highest  
 . Make any notes relevant to things you need to improve

1. What are your core competencies?		
Core Competency	Rate 1-5	Note Specifics
Clinical expertise in:		
Years experience with specific populations	<input type="checkbox"/>	
Unique treatment approaches	<input type="checkbox"/>	
Testimonials on effectiveness	<input type="checkbox"/>	
Outcomes data	<input type="checkbox"/>	

2. Competitive Advantages		
Core Competency	Rate 1-5	Note Specifics
Ability to deliver services:		
Faster	<input type="checkbox"/>	
Less expensively	<input type="checkbox"/>	
More conveniently	<input type="checkbox"/>	
With better results	<input type="checkbox"/>	
Better reputation	<input type="checkbox"/>	

3. Integration Strategies			
	A Cross Refer	B Co-Locate	C Integrate
Work collaboratively with:			
Primary care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical specialists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ER/Hospitals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schools/Colleges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community agencies/churches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>4. Use of Technology</b>		
<b>Core Competency</b>	<b>Rate 1-5</b>	<b>Note Specifics</b>
Use technology for:		
Appointment setting/reminders	<input type="checkbox"/>	
Treatment assessments/diaries	<input type="checkbox"/>	
Treatment communication, coordination, & follow-up	<input type="checkbox"/>	
Education	<input type="checkbox"/>	
Loyalty/referral building		

<b>5. Formalized Marketing</b>		
<b>Core Competency</b>	<b>Rate 1-5</b>	<b>Note Specifics</b>
Annual marketing plan that includes:		
Target marketing & goals	<input type="checkbox"/>	
Branded or licensed treatment methods or tools	<input type="checkbox"/>	
Diversified payers	<input type="checkbox"/>	
Use of multi-media	<input type="checkbox"/>	
Customer service policies & outcomes measurement	<input type="checkbox"/>	

## Tool 2

### Social Media Recommendations for Psychiatrists and Mental Health Practitioners

Marketing Tool/Venue	Purpose/Best Used For	Ideal Activity/Frequency	Target Audience (Demographic which prefers this medium)	Pros	Cons	Minimal/Annual Cost
Website  Example: <a href="http://www.susanmoore.rd.com">www.susanmoore.rd.com</a> (see mobile app)	Lists all pertinent information about your practice. Stand out from other practices. Offer online scheduling. Provide useful information to prospects.	Refresh annually, small informational updates monthly at a minimum.	Demographic is constantly changing as older individuals are embracing smartphone and internet technologies. Baseline demographics are 18-55.	Go to place for company information, appointment setting, rates and other pertinent information. Main place to establish your brand.	If too wordy or, not well designed, nor mobile friendly, it can reflect negatively on you and your ranking. (Need quality content.)	\$6,000 for branding/rebranding updates and \$500-\$1,000 per month at a minimum for maintaining brand. (BrandPolished quote)

Marketing Tool/Venue	Purpose/Best Used For	Ideal Activity/Frequency	Target Audience (Demographic which prefers this medium)	Pros	Cons	Minimal/Annual Cost
<p>Paid online MD directories. (Considered by Google as social networks, same as FaceBook or LinkedIn.)</p> <p>Examples:</p> <p>Healthgrades.com ZocDocs.com PsychologyToday.com</p>	Endorsement and referral	Annual	18-65	Helps prospects to easily find healthcare providers. Impacts reach, usage, traffic, etc. Each directory has a calculable reach that influences being found.	People search for doctors/medical systems in non-linear ways across multiple devices and this strategy needs to be included but should not be the only touch point used.	Healthgrades about \$3,600/yr. Psychology Today tiered membership, <u>free</u> to \$3,600+.
<p>Paid on-line search engine advertisements (Google Ads)</p> <p>Examples:</p> <p>Google: "Severe Depression"</p> <p>Ad: www.casaplmera.com</p>	To be found or promote products /services/clinical trials	Most effective upon initial site build. However, monthly monitoring of analytics is necessary. Google Ads — depending on campaign goal A/B testing of ads for a 1-4 month period with some pivoting depending on analytics.	Demographic can be targeted depending on campaign goals.	Google Ads — Can increase exposure to products and services.	Google Ads — Can take some time to put together an ad that resonates with your target audience.	Google Ads — \$600/yr (based on lowest cost of \$50/month with campaigns running up to \$500,000/month)

Marketing Tool/Venue	Purpose/Best Used For	Ideal Activity/Frequency	Target Audience (Demographic which prefers this medium)	Pros	Cons	Minimal/Annual Cost
<p>Landing Pages or Directional Pages</p> <p>Example: Addicitons.com</p>	To promote specific offerings or information. Lead generation or to further your presence on the internet.	Should be campaign-related and depends on goals of campaign. (ie. If you're launching a lead generating campaign you might develop a landing page to track specific traffic for that campaign to establish effectiveness.)	Target audience directly correlates to campaign demographic so it can range.	Allows a company to further their reach by having more information on the internet to assist with being found. Can be a strong strategy for tracking particular campaigns or disseminating information either in conjunction with your website or in addition to it.	If the landing page is disjointed with your brand messaging then it can create confusion. In some instances, it might come up in search engines before your website and can mislead if it was created for a specific purpose and does not represent all of your core competencies.	\$1,500 for design, development and posting of a 1-page lead gen site. (Hosting cost, stock photography and integrated technologies into your page can have an additional cost.) However, if designing a microsite that has several pages the price can significantly increase closer to a website.

Marketing Tool/Venue	Purpose/Best Used For	Ideal Activity/Frequency	Target Audience (Demographic which prefers this medium)	Pros	Cons	Minimal/Annual Cost
<p>LinkedIn</p> <p>Example: Dr. Aron Halfin</p>	To associate with professionals, be found by recruiters, or attract young adults.	Depends on your objective.	18-65 with 38% of all internet use by college students.	Preferred social network for professionals. Improve referrals, build brand identity, expand professional knowledge, enhance client relationships.	Should not be your only social media strategy.	\$779.88 (Ranges significantly based on goals. Prices vary based on advertising, finding talent, building sales).
Traditional media – Local monthly/weekly/annual magazines, newspapers, calendars.	Promote products, services and gain exposure.	1 targeted campaign a month	Age 45-65, unless the traditional media has an online presence or a strong niche audience then the demographic shifts to 18-65.	Can allow another touchpoint for exposure.	High cost, less trackable and effectiveness unless tiered with an online strategy.	\$10,000 - \$20,000+/yr

Marketing Tool/Venue	Purpose/Best Used For	Ideal Activity/Frequency	Target Audience (Demographic which prefers this medium)	Pros	Cons	Minimal/Annual Cost
Texting and Email Campaigns	Promote to individuals on the go and targeted email lists.	Depends on your overall goal.	18-50	Depending on the campaign, it can be effective in reaching individuals that you have a rapport with.	Email has a low conversion rate unless you have a strong email base. Most emails will go into spam and you can get blacklisted easily if you don't adhere to the strict policies of each individual email provider. In some instances it can take only one or two complaints to be banned.	Can range significantly if you need to buy or set up lead gen sites to accumulate lists.  Texting campaigns have several variables that need to be decided on that will determine cost.

## Tool 3

### Questions to Ask when Designing a Social Media Campaign

- a. The **Channel** (For example, LinkedIn)
- b. The **Persona** (Who are you specifically targeting? Please choose one.)
- c. The **Goal** (Is it a sales goal, cost-savings goal or are you trying to create a better customer experience?)
- d. **Primary Content Type** (Textual, video, infographics?)
- e. **Structure** (What does a general post look like?)
- f. **Tone** (Playful, sarcastic?)
- g. **Channel Integration** (How will this channel work with your other channels for maximum impact?)
- h. **Desired Action** (What user behavior do you want to achieve?)
- i. **Editorial Plan** (Every channel needs its own editorial calendar.)

**What is a realistic annual marketing budget for an integrated campaign for a physician practice which generates between \$ 500,000 and \$1,000,000?**

Plan you budget around **7 to 8 percent** of your gross revenue for marketing and advertising if you're doing less than \$5 million a year in sales and your net profit margin — after all expenses — is in the 10 percent to 12 percent range.

## Tool 4 Website Checklist

1. Site Navigation and Orientation	Yes	No	Don't Know
Contact information is readily available throughout site			
Content makes it clear where links will take the visitor			
Links are clearly labeled and categorized			
Key pages are accessible from most locations on the site Examples of key pages are the following: Home Page which includes a description of your specialty and testimonials. Logistics – how to make an appointment, office location & directions. Payment – fees, payment policies and insurance plans accepted Information/News/Blog – where you share your expertise and useful information			

2. Content, Layout and Functionality	Yes	No	Don't Know
Frequently Asked Questions (FAQ) page is provided			
Layout is clear and user-friendly			
Mobile-ready version of the website is available			
Unnecessary flash intro or auto-play video/audio are avoided			
Visual elements of design are not distracting or too "busy"			

3. Site Consistency	Yes	No	Don't Know
Consistent use of topic related terminology throughout site			
Consistent use design across site, with your logo in the same place on every page			
Images support your brand and key message			

4. Site Popularity	Yes	No	Don't Know
Keywords are implemented to boost SEO			
Other healthcare websites link to the site			
Social media integration Your LinkedIn, FaceBook, Twittter, etc. information should be easily accessible			

5. Site Appeal	Yes	No	Don't Know
Visuals draw your attention and make you want to read the content			
Engaging writing: talk to your audience, not at them			
Interesting, timely, and useful information is given			
Brand is clearly communicated, both visually and in writing			
Give directions to your practice Google has an app that makes listing your practice's address easy			
Include positive testimonials to reassure tentative patients			
Make sure to introduce yourself on the home page You may also want to include an "About Us" page			

## Tool 5

### Questions to Ask a Potential Marketing Vendor

WHAT	1. What is your healthcare experience, specifically behavioral healthcare?
	a. What clients have you worked with in behavioral healthcare in the last few years? (List number of years worked with each client.)
	b. What work did you specifically do for them?
	c. What are your specialties (advertising, website, social media, etc.)? How many staff do you have in each area?
	d. What steps do you use to get to know our business?

WHO	2. Of clients above, Who were the easiest/hardest to work with?
	a. Why?
	b. What makes a great company partner/client for you?
	3. Who will I be working with?
	a. List staff and titles you will be working with:
	b. Who will be my key contact?

HOW	4. How do you approach a project?
	a. Are you strategic or tactical? Explain.
	b. What are the steps of the brand development process, and how do you gauge if things are on track?

HOW MUCH	5. What are your average prices for the following. And what is included in your basic package: <ul style="list-style-type: none"> <li>• Website design</li> <li>• Ongoing social media and web support</li> <li>• Developing a logo</li> <li>• Ads</li> <li>• Social media support</li> </ul>
	6. Can you provide us with three to five references of similar type organizations that you have done website and brand development work for in the last couple of years? (Feel free to use the back of this form.)

## Tool 6

### Book and Website List

#### Marketing Classics

Author	Title
Al Ries & Jack Trout	<i>Positioning: The Battle for Your Mind</i>
Al Ries & Jack Trout	<i>The 22 Immutable Laws of Marketing</i>
Beckwith, Harry	<i>What Clients Love: A Field Guide to Growing Your Business</i>
Sandler, David H.	<i>You Can't Teach A Kid To Ride A Bike At A Seminar</i>
W. Chan Kim & Rene Melbourne	<i>Blue Ocean Strategy: How To Create Uncontested Market Space and Make the Competition Irrelevant</i>
White, Richard M.	<i>The Entrepreneur's Manual</i>

#### Additional Behavioral Health Specific References:

Author	Title
Davis, Jeri	<i>Marketing For Behavioral Healthcare Organizations: What Works and How To Do It.</i>
Davis, Jeri	<i>Marketing For Therapists</i>

#### Great Articles/Websites:

##### 1. Website:

- SEO tips for doctors
- General website tips, not doctor specific. Article links to several other helpful articles.

Souza, M. (2013, March 26). Top SEO Tips Doctors Should Know - Extima | Web Development and Online Marketing. <http://www.extima.com/2013/03/top-seo-tips-doctors-should-know/>

Schiff, J. (2013, June 4). 13 Simple Tips for Improving Your Web Design. Retrieved March 30, 2015, from <http://www.cio.com/article/2385250/online-marketing/13-simple-tips-for-improving-your-web-design.html>

## 2. Branding:

- Explains what branding is and outlines (simply) a good branding strategy

Williams, J. (2005, May 1). The Basics of Branding.  
<http://www.entrepreneur.com/article/77408>

## 3. Healthcare Marketing, Marketing Under Healthcare Reform

- A in-depth article that lists various marketing strategies for doctors
- A much shorter list of 10 marketing strategies for doctors

Giovino, J. MD. (2002, January 9). "You Should See My Doctor": Cost-Effective Marketing Ideas for Your Practice. <http://www.aafp.org/fpm/2002/0100/p33.html>

Mclaughlin, A. (2014, March 27). 10 Strategies to Market and Promote Your Medical Practice. <http://www.physicianspractice.com/blog/ten-strategies-to-market-and-promote-your-medical-practice>

## 4. Social Media & Professional Blogging:

- The perspective of a doctor on the benefits of blogging
- 9 examples of physician blogs
- (Simple) social media tips for doctors

Ritchie, A. (2013, December 13). Why writing a blog may benefit a physician's career. <http://medicaleconomics.modernmedicine.com/medical-economics/content/tags/blogging/why-writing-blog-may-benefit-physician-s-career?page=full>

Torrieri, M. (2011, March 24). 9 Physician Blogs Worth Checking Out. <http://www.physicianspractice.com/worklife-balance/9-physician-blogs-worth-checking-out>

Girgis, L. MD. (2014, October 28). Social Media Tips for Doctors. <http://www.physiciansweekly.com/social-media-tips-doctors/>

5. Good source of current suicide trends for various demographics (men vs women, elderly, different races, etc.)  
<https://www.afsp.org/understanding-suicide/facts-and-figures>