



# 2022

## Medical Practice Marketing Strategy

A detailed plan for getting your practice in front of the right patient, in the right place, at exactly the moment they are looking for you.

# Introduction

You've just taken the first step to successfully attract and retain patients in 2022.

In your hands is possibly the most effective and powerful marketing strategy you can create to achieve your medical practice's growth goals in 2022, including attracting patient website traffic, boosting patient interest (lead generation), and increasing appointments.

For learning purposes, we'll use hypothetical goals for Dr. Smith's Podiatry Practice (yes, this is a fictional doctor). But as you read, imagine where your practice is now and where it aspires to be at the end of the year. When we're done, you'll get an easy-to-use template to help you start organizing your strategy for 2022, one that you can then present to your team or leadership group. Sound good? Great. Let's do this.

**Note:** *If you're a Gmail or Google apps user, click "file," then "make a copy" to take notes or edit the template right on the screen. If not, or if you'd prefer to print something out, [click here to access a PDF](#).*

Google receives over  
**63,000**  
searches per second  
on any given day and  
healthcare is the no. 3  
searched topic.

\*(Source: Internet Live Stats)



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2. Determining and Tracking KPIs
3. Outlining Your Tactics
4. Planning Your Campaigns
5. Build Your Own Template (*This will make you look amazing to your boss*)



# 1 First Things First - Set Your Goals

Before diving into strategy specifics, you'll first need to determine your practice's business and marketing goals. What do you want to achieve? Understanding your goals will help guide what metrics or KPIs should be tracked. This, in turn, will help you figure out what tactics you should employ to hit those metrics.

First off, you'll need to take stock of your current state of affairs, including challenges, assets, risks, outcomes, budgeting, etc., and what you would like them to look like down the road. We're not going to sugarcoat this—it's a BIG job. But you can tackle it easily by asking and answering these questions:

- What business challenges are you trying to solve?
  - Maybe you need more revenue to pay for a new piece of equipment you recently purchased?
  - Perhaps you just added a new doctor who needs to fill his clinic in 2022 or a new marketing coordinator that needs to show results?
- What is the desired outcome of this strategy?
  - If it's new patients, how many do you need to meet your business objectives?
  - If it's an increased surgery schedule for big toe or ankle joints, then how many new surgeries will it take?
- What is the risk in this approach?
- Who's involved in achieving these goals?
- What is your budget for the process?
- What will happen if things go wrong?
- How much time do you have to demonstrate success?



## 1

# First Things First - Set Your Goals

- **What business challenges are we trying to solve?**

Dr. Smith's Podiatry practice recently purchased a new 3D computed tomography (CT) scanner to better evaluate ankle and foot ailments and deformities. The unit cost \$500,000, and now the practice needs to find additional revenue streams to enable the equipment to pay for itself.

- **What is the desired outcome of this strategy?**

Dr. Smith estimates that it will take 15 new patients per quarter and 10 additional foot surgeries per year over the next three years to recuperate the cost of the CT scanner.

- **What is the risk in this approach?**

We're casting a wide net. We can't guarantee that all or even the majority of online patients will be open to scheduling an appointment with us.



## 1

# First Things First - Set Your Goals

- **Who's involved in achieving these goals?**

Dr. Smith, Sally Jones (his practice administrator), Carlos (the marketing coordinator) and Insight Marketing Group (the agency partner).

- **What is our budget for this process?**

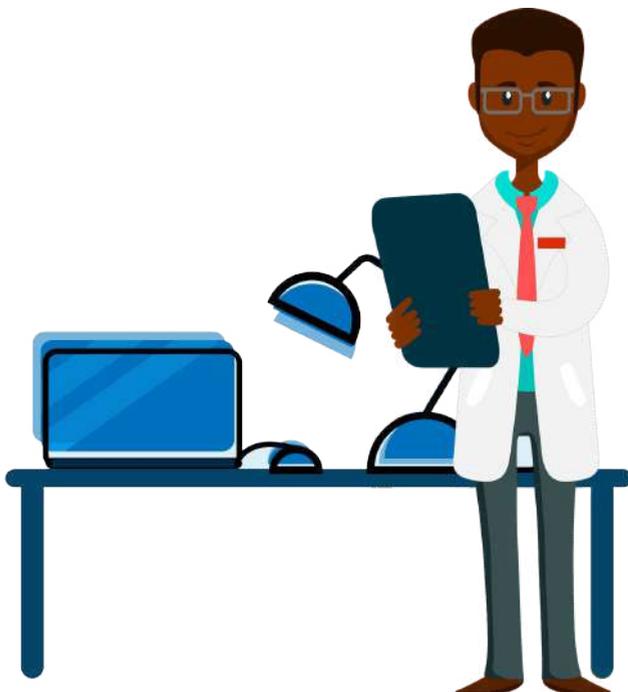
Outside of salaries, tools and equipment purchases our budget is \$10,000.

- **What will happen if things go wrong?**

Dr. Smith won't have enough patients to pay for the cost of the new equipment, and Carlos will likely lose his job. The agency partner will either get fired or replace Carlos, and then Ms. Jones will have to pick up *all* the slack. Poor Ms. Jones.

- **How much time do we have to show success?**

One year, but goals and progress will be evaluated quarterly.



# Aligning with the Patient Journey

Based on your answers to the questions above, you can then determine your specific objectives or goals. For Dr. Smith's Podiatry practice, they group their goals into stages along the Patient Value Journey (PVJ).

By mapping goals on the PVJ, they can better understand their audience's mindset and behavior when interacting with them. They'll also be able to hone in on short-term, quarterly "wins" and activities that contribute to reaching their long-term goals.

1

## AWARE

A potential patient first becomes aware of your practice, your physician(s) and your subspecialty.

The patient has a problem and you present your practice as the solution while explaining what differentiates you from a competitor down the street.

2

## ENGAGE

The potential patient takes an action to learn more about the practice or physician(s).

In this stage the potential patient will interact with you or their social circle. Essentially, you have triggered them to take an action now that they are aware you exist.

3

## SUBSCRIBE

Potential patient will opt in to view or receive additional content from your practice.

Here, a potential patient likes what they have seen so far, but isn't ready to commit to an appointment just yet. They are, however, seriously considering you for their healthcare.

4

## CONVERT

They have seen enough and move from being a "potential patient" to a "patient" of your practice with a scheduled office visit.

You have made a good enough impression on the patient that they have chosen you above your competitors.

5

## DIAGNOSE & TREAT

At this step, it is up to the medical team to diagnose, prescribe treatment and provide next steps to the patient.

In return for coming to the office, the patient receives immediate value in the form of a diagnosis or treatment plan complete with next steps following the appointment.

6

## ASCEND

As part of their journey, the patient may or may not be prescribed several additional treatments, depending on their condition and response to initial treatment in the previous step.

7

## ADVOCATE

The patient has completed treatment and is satisfied with the outcome of their care. They now can advocate for the practice both online and offline.

At this stage, the practice typically asks the patient to provide a review or testimonial.

8

## PROMOTE

Once the patient is discharged from care completely, they will continue to tell others about the level of service and success they experienced.

This is the step where the patient continues to provide value for the practice by organically sharing their experience long after they have stopped scheduling appointments.

# 2022 Goals

To continue with our example, let's keep it simple and say you have set the following attract, subscribe, and conversion goals along the Patient Value Journey.

**Attract and Engage:** In order to grow Dr. Smith's Podiatry practice and increase revenue, they need to strengthen the awareness of their practice's brand among new patient audiences and engage them.

**Subscribe:** After Dr. Smith has attracted their target audience's attention, they'll want them to opt-in to the practice's marketing efforts by doing one (or more) of the following:

- Subscribing to Dr. Smith's newsletter
- "Liking" the practice page on social media to receive updates in their newsfeed
- Downloading a whitepaper or eBook from the practice website (for example, "10 Stretches to Ease the Pain from Plantar Fasciitis")
- Signing up for a webinar to discuss a particular condition or treatment option

**Convert:** *After the prospective patient is in the funnel and enjoying the content, Dr. Smith wants to encourage them to book an appointment either via the website or by phone and to show up for an in-office visit.*

## CONVERT

They have seen enough and move from being a "potential patient" to a "patient" of your practice with a scheduled office visit.

You have made a good enough impression on the patient that they have chosen you above your competitors.

## Achieving Conversion

Appointment is booked and scheduled via your website or phone

They have set up a time for an in-office consultation for services

They do not cancel the appointment

## 2 Turning Goals Into KPIs

Next, looking at your goals, identify key performance indicators (KPIs) or essential measurable results that you can track and use to benchmark progress towards your objectives.

The indicators should:

- Be definitive—hard and clear numbers with no room for ambiguity
- Point directly to what you are working towards.

To help you find the best KPIs ask, ***“What specifically needs to be done to achieve the goal? Do I need more leads? Better leads? More ‘likes’ on Facebook?”***

The answers to these questions will help you uncover the things you need to be tracking. Then it’s simply a matter of applying numbers. These metrics may change monthly or quarterly, depending on your goals.



**KPIs should be definitive and specific**

K: Key  
P: Performance  
I: Indicators

# KPIs Along the Patient Journey Process

Along the Patient Value Journey, KPIs will vary depending on your ancillary offerings, the patient journey, and your subspecialty. For Dr. Smith's Podiatry practice, KPIs may be, but are not limited to, the following:

- More referrals, which means expanding their reach to GPs
- Boost likes on Facebook through a targeted patient testimonial and video content strategy and Facebook ads
- Increase organic website traffic
- Track and manage review scores on Yelp, Healthgrades, etc.
- Increase subscribers to their newsletter and eBook or whitepaper downloads
- Maximize potential patients signing up for a webinar
- Increase online and phone appointments

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# 2022 KPIs

Again, your specific KPIs will vary depending on your ancillary offerings, the patient journey, and your subspecialty. Here's an example for Dr. Smith:

## AWARE

**Aware:** The potential patient has a problem and Dr. Smith presents their practice as the solution.

**KPI:** Dr. Smith now shows up on the first page of Google for 'How to Eliminate Plantar Fasciitis' in positions one, two, and three in the organic listings.

## ENGAGE

**Engage:** The potential patient visits the practice website and reads relevant information about their problem.

**KPI:** The patient's journey can be tracked via Google Analytics as page visits and time on page.

## SUBSCRIBE

**Subscribe:** The potential patient opts in to view or receive additional information from the practice.

**KPI:** 25 downloads of Dr. Smith's eBook per month.

## CONVERT

**Convert:** They have seen enough and move from being a *potential patient* to being a *patient* of the practice and have scheduled an office visit.

**KPI:** 15 new patients per quarter and 10 additional foot surgeries per year over the next three years.

# Monitor Your KPIs

Metrics mean nothing if you are not consistently tracking them and taking action when necessary. A spreadsheet like the one below makes it easy to:

- **Monitor** your metrics
- **Analyze** the progress of your goals
- **Identify** issues
- **React** when necessary



Metric	Current	Goal	Jan. 2021	Feb. 2021	Mar. 2021
<b>Appointment Form Visits</b>	1,000	5,000			
<b>Conversion Rate</b>	1%	2%			
<b>Potential Patient Contacts</b>	10	100			
<b>Bunion Consultation Requests</b>	3	30			
<b>New Patients per month</b>	1	10			



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Metric	Current	Goal	Jan. 2022	Feb. 2022	Mar. 2022
Appointment Form Visits	1,000	5,000	1,500		
Conversion Rate	1%	2%	1.1%		
Potential Patient Contacts	10	100	17		
Bunion Consultation Requests	3	30	6		
New Patients per month	1	10	2		



As an example, these KPIs aren't showing progress and need be addressed.

## 3 Tactics to Make it Happen

After you've determined what you want to achieve and how you will measure success, you can lay out the tactics that will help you achieve your goals.

### AWARE

- Blogging (We recommend a patient-first approach)
- Guest-Blogging on Industry Publications
- Technical SEO
- Paid Social Ads

### ENGAGE

- Helpful and Informative Site Content
- Compelling Graphic Design and Images
- Videos About the Practice and Procedures
- Clean and Clear Site Navigation

### SUBSCRIBE

- Conversion Rate Optimization
- Premium Offer Creation
  - Subscription Lead Magnet
- Landing Pages
- Calls-to-Action

### CONVERT

- Case Studies
- Reviews
- Testimonials
- Promotions/Incentives

# Note: Specific Tactics = Specific KPIs

If your data needs to be more specific, it may be helpful to add more goals or metrics.

Metric	Current	Goal	Jan. 2022	Feb. 2022	Mar. 2022
Website Traffic per month	5,000	10,000			
Conversion Rate	1%	2%			
New Contacts	100	200			
Bunion Consultation Requests	20	40			
New Patients per month	7	13			
Webinar Views	100	200			
eBooks Downloaded	10	25			



**AWARE**

**ENGAGE**

**SUBSCRIBE**

**CONVERT**

These tactics can  
then be broken into  
specific campaigns...

## 4 2022 Campaign Plan

Patient Journey Stage	Campaign	Content Type	Working Title/ Description	Patient Persona	Promotion Channels
Aware					
Engage					
Subscribe					
Convert					

### Don't Forget:

Things change all the time. It's important to not get too specific in your 2022 strategy to avoid locking yourself into anything. If something changes in the industry, having a flexible strategy will allow you to pivot and make adjustments when necessary.

# So, how do you create a campaign?

# What Should Your Medical Marketing Campaign Look Like?



**INSIGHT**  
MARKETING GROUP

# What Should Your Medical Marketing Campaign Look Like?



## **Win-Win Conversion**

Create an offer for the patient to provide contact information in exchange for something of value to them (i.e., eBook, webinar, premium product).



## **Ongoing Communication**

Develop a workflow that naturally guides the patient to the next stage in the Patient Value Journey and continue to nurture the relationship.



## **Paid Advertising**

All of your campaigns should have a designated digital advertising budget to ensure targeted success.



## **Location, Location, Location**

Where the campaigns are promoted is just as important as the content of the campaign itself. Campaigns will be promoted across the following channels: blog, website CTAs, PPC, and social media. All content will be optimized for SEO.



# What Should Your Medical Marketing Campaign Look Like?

For the sake of example, we'll stick with Dr. Smith.

**Campaign:** Sad Feet

**Topic:** Plantar Fasciitis

**Persona:** Betty, Jane, and John - all new runners

**Patient Journey Stage:** Attract

**Goal:** 5 new patients per month

## Campaign Assets: Conversion Tools

- Ebook, "Stretches to Ease the Pain from Plantar Fasciitis"
- Landing Page
- Thank You Page
- Delivery Email
- Blog #1
- Blog #2
- Blog #3

# What Should Your Medical Marketing Campaign Look Like?

*continued...*

## **Campaign: Sad Feet**

### **Ongoing Communication**

- Emails
  - Email #1
  - Email #2
  - Email #3
- Workflow Strategy
- Remarketing Design & Tracking URL

### **Promotion Strategy**

- Social Channels (Organic)
- Social Channels (Paid)
  - Ad Copy, Tracking URL
- SEM (Paid)
  - Ad Copy, Tracking URL
- SEO Strategy
  - Target Keywords (see following slide)
- Referral Strategy
- In-Office Strategy
  - Patient Room Materials, Lobby Videos, Takeaway Item for Patients, Signage, etc.

# That's All, Folks!

We hope this strategy plan was helpful and motivates you to start 2022 with a bang!

At the end of this presentation, you'll find a template that you can use to build your own medical marketing strategy for 2022. If you still need help setting your goals and determining which tactics to make 2022 your year, we're here to help! We would love to learn more about your practice, your goals and if we can be a partner for growth in the new year.





**INSIGHT**  
MARKETING GROUP

InsightMG.com

# **It's Your Turn! Build Your Own 2022 Strategy**

If you're a Gmail or Google apps user, click "File," then "Make a Copy" to start editing the following template right on-screen.

The background features abstract geometric shapes in various shades of blue and green, including triangles and overlapping rectangles, creating a modern, dynamic feel.

# Your Logo

# 2022

## Medical Practice Marketing Strategy

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# 2022 Goals & KPIs

Stage in Patient Journey

How You Will Achieve (Goals)

How You Will Measure (KPI)

**AWARE**

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**ENGAGE**

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**SUBSCRIBE**

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**CONVERT**

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**DIAGNOSE  
& TREAT**

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**ASCEND**

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**ADVOCATE**

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**PROMOTE**

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# Tracking KPIs

For each of your KPIs you need to establish a spreadsheet or table so you can monitor your progress to make sure you stay on track.

Metric	Current	Goal	Jan. 2022	Feb. 2022	Mar. 2022
Website Traffic per month					
Conversion Rate					
New Contacts					
Consultation Requests					
New Patients per month					

# Tactics to Get Us There

AWARE

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ENGAGE

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SUBSCRIBE

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CONVERT

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DIAGNOSE  
& TREAT

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ASCEND

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ADVOCATE

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PROMOTE

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# 2022 Campaign Plan

## Overview

Patient Journey Stage	Campaign	Content Type	Working Title/ Description	Patient Persona	Promotion Channels

**Campaign: [TITLE]**

**Topic:**

**Persona:**

**Patient Journey Stage:**

**Goal:**

**Campaign Assets: Conversion Tools**

- Content Asset Type
- Landing Page
- Thank You Page
- Delivery Email
- Blog #1
- Blog #2
- Blog #3

**Ongoing Communication**

- Emails
  - Email #1
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- Workflow Strategy
- Remarketing Design & Tracking URL

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**Topic:**

**Persona:**

**Patient Journey Stage:**

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**Promotion Strategy**

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- Social Channels (Paid)
  - Ad Copy, Tracking URL
- SEM (Paid)
  - Ad Copy, Tracking URL
- SEO Strategy
  - Target Keywords (See following slide)
- Referral Strategy
- In-Office Strategy
  - Patient Room Materials, Lobby Videos, Takeaway Item for Patients, Signage, etc.



# Need Help Building Your 2022 Medical Practice Strategy?

If so, we're here for you.  
Just visit **InsightMG.com** to  
schedule a free, no obligation  
call with one of our medical  
marketing experts.