



# Planning a Dynamic 2012 Marketing Calendar

by Nancy Hyman

The thriving orthodontic practices in today's environment all share common elements in their practice growth plan: a vision of the desired patient flow (new starts and active patients), determining the target audience, a variety of selected strategies, and implementation of a task list and tracking of referral strategy efforts. In speaking with hundreds of doctors within the last year one point became very clear; the old way of creating growth is no longer working... business as usual no longer creates the desired results!

## Your Vision and Audience

The doctor clarifies the flow of patients that offers a template for the day, week, month, and year. How many patients do you want to see in one day? What is the preferred number of patient days in each month? How does your demographic area relate to your fees? Is your production goal feasible in relationship to the number of desired new patient starts and maximum fee per case as determined by your demographic. A doctor in the South desired a high pay for fee practice; however his patient population is low income in relationship to the desired fees. Know your audience! Many areas can support a high fee, lower volume boutique practice and a lower fee, higher volume practice. A doctor in a high income area found that the patient to patient referral rewards were not appreciated by his audience, thus the strategy was not successful. Jessi Swift, founder of JSwift Marketing notes, "We are always studying current economic and marketing trends to ensure we are appealing to families in a manner that will get the best response and recognition. This is vital in our struggling economic times. This means the look and recommended offers may change based on what consumers are responding to at any given time."

## Develop Strategies

The first order of business is to review your current strategies and results of tracking new patient phone calls. A doctor developed a professional referral plan that was

well-executed for two years. The result? Professional referrals decreased! It may be time to refresh your current approach. Some evergreen strategies are welcomed by your audience and anticipated as the date approaches. At the office of Dr. William Hyman we host a tamale party on the first Thursday of December to welcome in the tradition of preparing tamales during the holiday season. Review the participation from year to year. If participation peaks or increases at an acceptable number, keep the strategy. Consider adding a new twist to keep the event fresh. Initiatives such as wooden nickels may no longer be an exciting way to motivate desired behavior in your patients. Either refine or eliminate the programs that do not get the results you desire. Yes, there will be some complaints whenever a program is eliminated. However, replacing a failing program with an exciting program will energize the crowd. Search for fresh concepts by holding a semi-annual brainstorming session with your team, attending practice growth lectures, including Ortho2's Users Group Meeting, and perusing articles from orthodontic publications. I recommend Orthodontic Products magazine, the Ortho2 quarterly newsletter, and the BentsonClark reSource newsletter.

## Implementation of Your Plan and Tracking Results

Prepare a Microsoft Excel or manual spreadsheet with a list of the tasks and strategies. Designate each item with create, daily, weekly, monthly, quarterly, annually, or review. Creation is always the first step. Items that fall under create can include rewarding patients for referrals or creating announcement or marketing plans. Marketing plan items may include referral cards, e-blast announcements, in-office posters, handouts, referral cards, direct mail, Facebook, Twitter, etc. Indicate the frequency

---

## Reprinted from

The Newsletter for Members and Friends of Ortho2  
January 2012 - Volume 30 Issue 1

of the event. Patients may be asked for referrals daily, Facebook may updated weekly, an OSHA lecture event may be held annually, etc. Review indicates an annual check on each strategy from the graphics, implementation, cost, tracking results and general feedback from your target audience.

Key marketing team members will meet weekly to discuss progress on active strategies. The doctor and full team will meet monthly for a statistical review of the plan-professional referrals, patient-to-patient referrals, RSVPs to holiday party, etc. Track each initiative monthly, quarterly, and annually. Track the referral source at the new patient phone call. Look at all your strategies and review the number of participants. Examples include: the number of participants in the monthly oral hygiene drawing, new Facebook fans added monthly, respondents to a dated event, etc.

Look to your team and a strong leader to help you take your practice to the level of success you deserve. You and your team will reap the benefits of a thriving practice with a thoughtful and well-implemented plan. ♦

## About the Author

---



Nancy Hyman, founder of Ortho Referral Systems, is dedicated to maximizing patient referrals and case acceptance with innovative, cost-effective solutions. She will present two courses at the 2012 Users Group Meeting in San Diego.