



MARKETING / OFFICE / STAFF

5 Simple Steps to Create an Effective Marketing Calendar

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"If you fail to plan, you are planning to fail." ~ Benjamin Franklin

In the educational experience of most healthcare practitioners, business and marketing are overlooked topics. Therefore, when you graduate with your certificate, degree, or diploma, you may be very skilled in your chosen discipline, but feel ill-equipped to run and market your healthcare practice. Remember, your practice is a business and must be treated as such in order to flourish.

Perhaps the single most important ingredient of a successful practice is planning. You plan the layout of your office, you plan the look and tone of your business cards and brochures, and you plan the care you provide to your clients. So, too, should you plan your marketing and it begins with a written marketing calendar.

Why You Need It

Let's face it. It can be hard to obtain clients when you're new in practice. Perhaps your practice is already fairly successful. Or maybe the task of constructing a marketing calendar seems overwhelming and outside of your skill set. But anyone can build an effective marketing plan with a little information, a few hours, and some motivation. To help with that last piece, let's take a look at why a marketing calendar is important to all healthcare practitioners in private practice.

First, establishing a written marketing calendar each year can provide focus and consistency to your practice marketing strategy. This way, you're less likely to lose track of time or host sporadic events. Consistency cultivates trust, and someone who trusts you is more likely to use your services.



Second, a marketing calendar helps you to better manage your marketing budget. Poor cash flow can kill a practice. Knowing what events are coming up allows you to plan your finances properly and ensure your expenses are covered.

Third, a written marketing calendar allows you to best schedule your time and that of your staff, partners, and volunteers. Knowing what after-hours events or high-energy activities are forthcoming, you can rearrange hours and schedules as necessary to avoid exhaustion or burnout. In addition, proper planning of time and resources can improve the execution of your event. Better execution can generate superior results and momentum.

Finally, by establishing a well-thought out written marketing calendar at (or before) the beginning of the year, you ensure you're able to fit in the events you want – those that provide great results, are close to your heart, or ramp up your passion. If you leave your marketing to chance, or do it at the last minute, you might run out of time before doing the events that really matter.

Preparation Tips

1. Block out 1-2 days. You can create your marketing calendar alone, or with the help of your staff at an office retreat.
2. Gather necessary tools and reference materials such as: Calendar, upcoming holiday and vacation dates, a list of potential events, pens, paper, calculator, et c. You can do it the old fashioned way (on paper) or by using a computer, tablet, smart phone, program, or app.
3. Develop a list of potential events and activities for the upcoming year, as well as a wish list of events you can "grow in to" in the future.
4. Always remember this is your practice, and your marketing events should reflect you.
5. While you'll create your marketing calendar in advance, don't forget that it's a fluid document and an ongoing process. It can (and should) be modified, tweaked, and updated as needed.

Step 1

Survey: Reach out to your current clients and ask them what marketing events/activities they liked, what they didn't like, and what they'd like to see in the future. For example, if you've been thinking about establishing a 5K run, you can ask your clients if they'd participate or recommend it to others. If they say no, perhaps your resources are better spent on other events. You could also survey your colleagues and ask them what events have worked well for them. The surveys can be verbal and informal, written and anonymous, or even completed on-line using a free survey website. Whatever method you choose, be sure to keep it short and simple!

Step 2

Schedule: Go through each month on your calendar and fill in holidays, vacations, and any other important dates. If you're hosting a large event like a 5K run or wellness fair, you may want to see when other similar events are scheduled in your area so you can select a date without conflict. A good rule of thumb is to schedule one activity/event in your office and one outside of your office each month to avoid overextending yourself. You can always add more activities later if time and resources permit, but it doesn't look professional if you cancel events.

Step 3

Set Goals: Set your marketing goals using whatever method works best for you, but they must be written and measurable. What results do you hope to see within what time frame? Use concrete measurements or metrics. For example, do you hope to schedule five new patients from this event within the next two weeks? Do you hope to increase referrals from existing clients by 10% within a month of the event? Be specific!

Step 4

Determine Tracking: How will you track the results of your efforts and know if you achieved your stated goals? Who's responsible for what? Tracking doesn't have to be complicated. Using our above example, it can be as simple as an excel spreadsheet listing the event and the names of the new

patients obtained, or the names of existing patients and their referrals.

Step 5

Communicate: Make sure your entire team understands the marketing calendar, goals, tracking, and their role in each.

Congratulations on creating your first marketing calendar! You're likely to find it gets easier to do each year, and you may begin to look forward to setting your annual marketing vision. Review your marketing calendar regularly, post it in a conspicuous location, update it as needed, and allow it to serve as your road map to greater practice success.

BONUS Tip

Consider creating a 3-ring binder (or digital folder structure) which includes an area for each month. Within the month section create a subdivision for each event which includes the goals, budget, steps, tracking, and post-event evaluation notes. You can also keep copies of your promotional materials (flyers, sign-in sheets, certificates, PowerPoint presentations, et cetera) here. This way, everything about each event is in one easily-accessible location.

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