



MyDental
CMO

THE CMO ACADEMY
Workbook

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In Preparation...

To best prepare for our first session, please complete this page **PRIOR** to our start date.

- ☐ Pull your New Patient List from the past year, and reconcile all missing referral sources.
- ☐ Pull your Fee Schedule List (including cash) for 1 insurance company you're in network with.

List your marketing investments for the last 12 months below	List the spend for each investment below
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Total Marketing Spend	\$

What was your GROSS production for the last 12 months?	\$
What was your NET production for the last 12 months?	\$
What were your total insurance adjustments on production for the last 12 months?	\$

Week One

Dental Marketing Fundamentals

There are two types of currency.

1.

2.

Sometimes, you're willing to spend more **time** to save **money**, and sometimes, you're willing to spend more **money** to save _____.

Think about a time when MONEY was more important to you than TIME. What was the scenario?

Think about a time when TIME was more important to you than MONEY. What was the scenario?



3 Types of Marketing & their effectiveness

Interruption

Includes:

Conversion Rate:

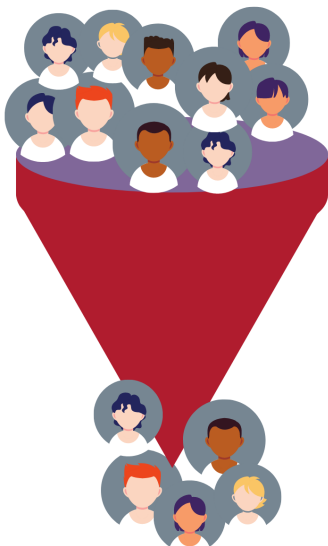
Typical ROI:

Cost:

Money:

Time:

Funnel Shape:



Permission

Includes:

Conversion Rate:

Typical ROI:

Cost:

Money:

Time:

Funnel Shape:



Marketing with Meaning

Includes:

Conversion Rate:

Typical ROI:

Cost:

Money:

Time:

Funnel Shape:



How much did you spend on marketing last year?

How many new patients did you have last year?

What was your total production from NP's last year?

How many new patients were referred last year?



COST PER NP

Amount Spent



of NP's

RETURN ON INVESTMENT (ROI)

Total Production



Amount Spent

VALUE PER NP

Total Production



of NP's

FORMULAS TO REMEMBER

W.O.M. FACTOR

of Patients Referred



Total NP's

Practice makes progress:

1. If we spent \$50,000 on marketing last year and had 300 new patients, what is the *cost per NP*?

$$\$50,000 \div \underline{\hspace{2cm}} = \$\underline{\hspace{2cm}}$$

2. If we had 45 new patients last month and these new patients produced \$33,750, what is the **NP value** (*Average production per NP*)?

$$\text{\$ } \underline{\hspace{2cm}} \div 45 = \text{\$ } \underline{\hspace{2cm}}$$

3. If we spent \$10,000 on interruption, how much should come back?

$$\text{\$10,000} \times \underline{\hspace{2cm}} = \text{\$ } \underline{\hspace{2cm}}$$

4. If we spent \$20,000 on MWM, how much should come back?

$$\text{\$20,000} \times \underline{\hspace{2cm}} = \text{\$ } \underline{\hspace{2cm}}$$

5. What is the **cost per NP** for your practice?

6. What is the **value per NP (Avg. production per NP)** for your practice?

7. What is **your ROI** for the current marketing in your practice?

8. What is your **W.O.M. Factor** for your practice? What % of your patients are referring other patients?

How will knowing this benefit your practice?

Identify an experience you've talked to others about recently. What was the situation and why did you share it with others?

When do people talk about dentistry?

- 1.
- 2.
- 3.
- 4.
- 5.



When do we WANT patients to talk about us?

Why don't people talk about the *dentistry* they received?

4 Rules of Word of Mouth Marketing

Rule #1: Be Interesting-or be _____.

- Nobody talks about _____ stuff.
- The interesting things we want people to talk about usually have _____ to do with dentistry.

What ideas do you have for being “interesting?”

- | | |
|-----------------------------|---------|
| • Cavity Free Club | • _____ |
| • Party or open house | • _____ |
| • Employer Lunch and Learns | • _____ |
| • _____ | • _____ |
| • _____ | • _____ |

Rule #2: Make people happy

- Make someone's day _____.
- Make a joke.
- Provide excellent _____. Go the extra mile.



Think of a personal situation when someone turned an unpleasant experience into a positive experience to remember. What happened? How did you feel?

Rule #3: Earn trust and respect

What can you do to earn trust and respect?

Rule #4: Make it easy!

- Make it easy for people to talk about you.
- How?

Think of a time when something that should have been easy, wasn't easy. What emotions did you experience?

What can you do to encourage a culture of gratitude in your practice?



The REAL cost of insurance participation

Insurance participation is a _____ cost.

If not fee for service, pick ONE insurance you're in network with below and enter in the insurance allowable fees and your full cash fees into the table below.

Insurance Provider	Dental Code	Allowable Fee	Cash Fee
_____	Ex: D0150 Adult Prophyl	\$63.27	\$116
	D0150 Comp Exam		
	D0140 Limited Exam		
	D0120 Periodic Exam		
	D2392 2 Surface Filling		
	D2740 Crown		
	D3330 Endo Molar		
	D7140 Extraction		

Total Allowables	
------------------	--

Total Cash	
------------	--



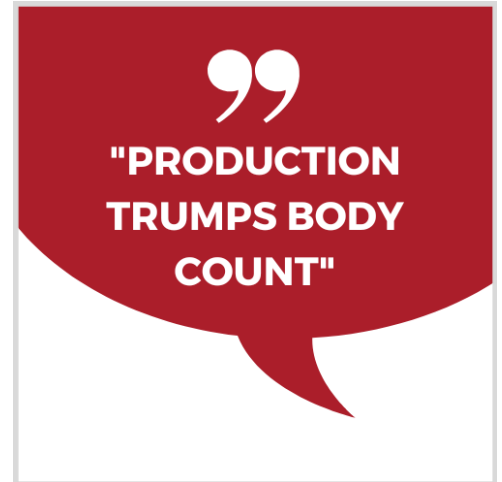
$$\frac{\text{Total Allowables}}{\text{Total Cash}} = \% \text{ of Patient Discount}$$

$$\frac{\text{Total Cash}}{\text{Total Allowables}} = \frac{\text{Marketing Cost}}{\# \text{ of in-network plans}}$$

What goals do you have for the upcoming year in terms of marketing?

New patients?

Production?



If each new patient is currently worth \$1000 and we were able to increase that to \$1500, how much of an increase would that yield for the year?

\$_____

Circle which is better...

of New Patients

Production per New Patient

Take Action this week!

- ☐ Add the "Type" column to your NP list. Looking at each patient's referral source, determine if they're an Interruption, Permission, or Marketing with Meaning Patient. Sort by "Type."
- ☐ Watch [this video](#): Dan Heath: Build Peaks, Don't Fix Potholes
- ☐
- ☐
- ☐

Week Two

Understanding Your Practice Data

What's one fear you overcame this week?

Let's review:

1. What form of marketing should give you a 1:3 return rate? Why? Inter_____

2. Why should you spend more money on Marketing with Meaning?

3. What is the formula for calculating the ROI?

Total Production \div _____ $=$ ROI (1: ?)

4. What is your current ROI for marketing in your practice? 1:_____

5. What is the current Cost per NP? \$_____

6. What is the current Value per NP (APNP)? \$_____

3 Types of Marketing & their effectiveness

Type	Financial Investment	Time Investment	ROI	Conversion Rate	Speed of Acquisition
Interruption (advertising)	\$\$\$		1:3	50%	  
Permission (Digital)	\$\$	 	1:10	70%	 
Marketing w/ Meaning (PR and Community)	\$	  	1:20	90%	

Key Concepts we'll cover today:

1. _____
2. _____

Why it matters:

Your role as Marketing Coordinator or Practice Ambassador:

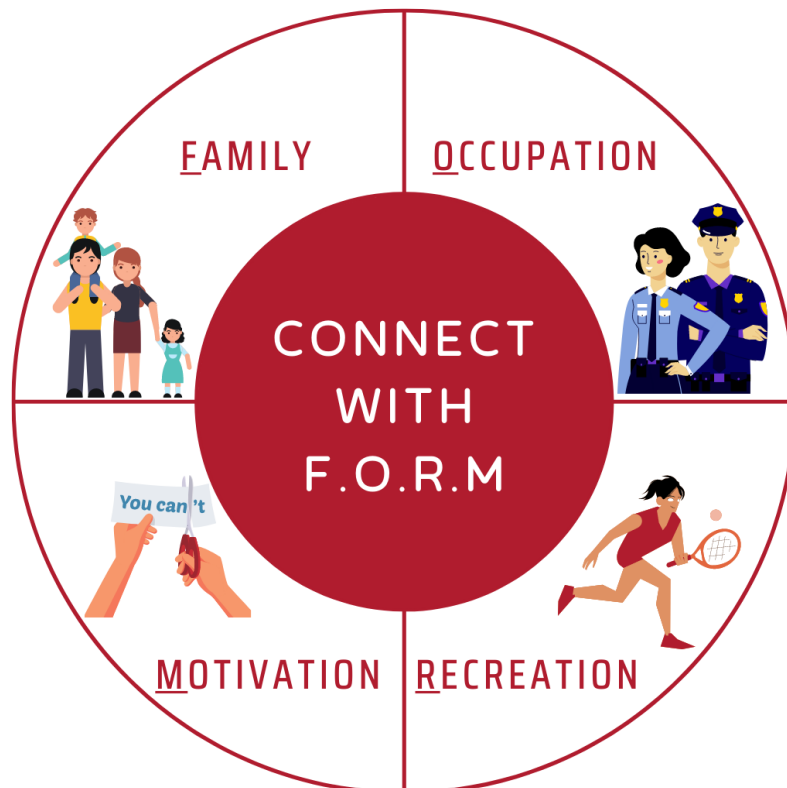
What is something you currently do in your office that provides a “Peak Moment” for patients?

Attrition Matters:

of patients lost  _____  Attrition Rate (%)

Know thy Patients!!

In what ways can you TRULY connect with your patients? Or, Referring Offices?



RETURN ON INVESTMENT (ROI)

Total Production



Amount Spent

Let's dig into the data!

1. How many new patients last year did you acquire through **interruption?** \$ _____

What was the total production from these patients? \$ _____

What did you spend on Interruption? \$ _____

What is your ROI on interruption? 1: _____



2. How many new patients last year did you acquire through **permission?** \$ _____

What was the total production from these patients? \$ _____

What did you spend on permission? \$ _____

What is your ROI on permission? 1: _____

3. How many new patients last year did you acquire through **M.W.M.?** \$ _____

What was the total production from these patients? \$ _____

What did you spend on Marketing with Meaning? \$ _____

What is your ROI on Marketing with Meaning? 1: _____

Therefore, what?

☐
☐
☐

Take action this week!

☐ Watch [this video](#): How to Achieve a Growth Mindset

☐☐☐

Week Three

High-Value Patients: Attract, Retain and Multiply

What is one improvement, one thing you did better, last week?

Let's Review:

1. What is a New Patient worth in your practice? (APNP)? \$ _____
2. What is your current ROI for Interruption? 1: _____
3. What is your current ROI for Permission? 1: _____
4. What is your current ROI for Marketing with Meaning? 1: _____
5. Which of the 3 types of marketing are you going to focus on going forward? Why?
Marketing with _____

6. Review what goals you have for marketing, new patients, and production for the upcoming year.

Key Concepts we'll cover today:

1. _____
2. _____

Why it matters:



Describe a “good” gift for a patient.

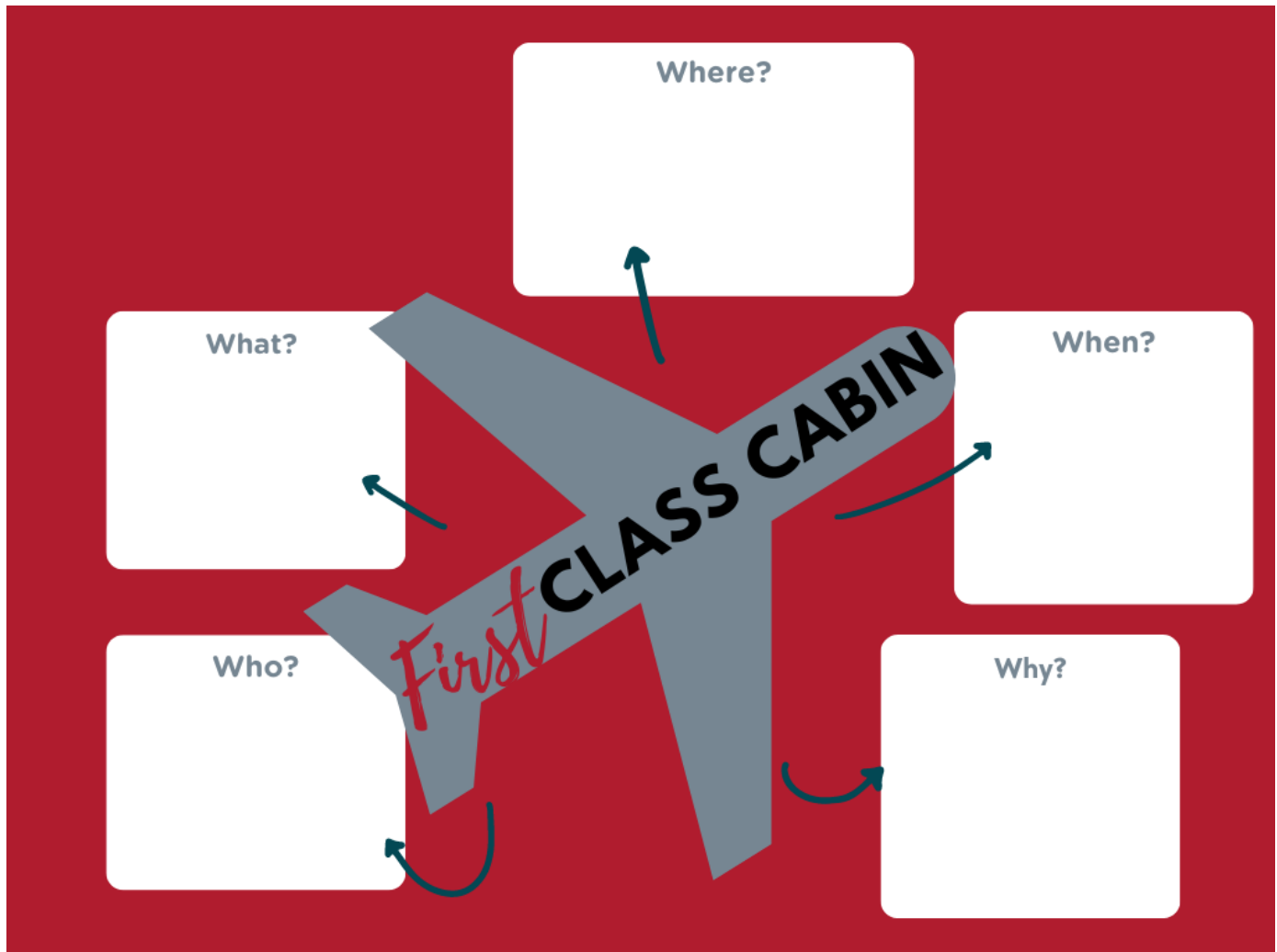
Describe a “better” gift for a patient.

Describe a “best” gift for a patient. What makes this the “best?”



Who are your **First Class Cabin Patients?**

20% of your patients make up _____% of your Revenue



Step 1

Determine your New Patient Production within the last 12 months.



Step 2

Determine your total New Patients seen within the last 12 months



Step 3

Divide Step 1 by Step 2



Any patient producing over Step3



First **CLASS CABIN**

In what other ways (besides production) can your patients be classified as “First Class?”

Now, determine WHERE your First Class Cabin patients are coming from? Trends?

Is it another patient?

Is it a referring doctor?

Is it from a marketing initiative you did?

What can you do differently, operationally, for your First Class Cabin Patients?

Why are “Thank You” notes important?

“Marketing looks at your practice from the _____’s point of view.”

-Peter Drucker

What are you going to do to get the team’s buy-in? Why is it important?

Take action this week!

- ☐ Determine how many patients you saw yesterday. Determine how many of those have future appointments to determine your reappointment rate.
- ☐ Watch [this video](#): Life Vest Inside: Kindness Boomerang
- ☐
- ☐
- ☐

Week four

The Essentials of Design and Relationships

What did you do to get outside your comfort zone last week?

Let's review:

1. What is the good, better, best philosophy?



2. The “best” gift is something _____, and delivered in the office, their workplace or home.
3. The marketing type that delivers the BEST ROI, and the best CONVERSION rate is _____ with _____.
4. What is the formula for determining the ROI in your practice?

Production \div _____ $=$ _____ :

5. Two types of currency are _____ and



Key Concepts we'll cover today:

1. _____
2. _____

Why it matters:

Intro to *Canva*

5 Rules for Design

1. Put your _____, phone number and website on everything
2. All things important go in the top ½ of the design.
3. No more than _____ different fonts.
4. ⅓ of the design should be white space.
5. Always have at least 2 additional people proofread.

What is missing from this ad?



What would you change about this ad?

DENTAL IMPLANTS • SAME DAY TEETH!

In order to protect our team, our patients, your families, and the community we have implemented and trained our team on the latest safety measures. *All dental treatment will be handled per the guidelines of the Center for Disease Control, American Dental Association, and New Jersey Dental Association.* Contact our office today to prepare for your safe, in-office visit

Now a registered 3D IMAGING CENTER To Save You Time And Money

We Stand Behind Our Work! Professional, Quality Results Will Bring A Smile To Your Face!

\$99
Per implant
OFFER GOOD THRU 3/31/22

OVER-DENTURE ON 4 IMPLANTS
Dental Implant Special
For a Limited Time
\$4,500 (per arch)
Includes Consultation and X-Rays (actual value \$12,000)

"You were courteous, professional, and meticulous. The service was outstanding and the payment schedule was very reasonable."
- Lt. Greg, Palisades Interstate Parkway Police

"Job well done!" - Arthur Weisenfeld, M.D., FACC, New York, NY
"I can now eat ribs and smile all day long!" - A. Samuels, Tenafly

Your Full Service Dentistry!

\$1850 COMPLETE*
Includes Abutment and Crown
(usual & customary fee \$4000)
Offer good thru 3/31/22

Over 10,000 Implants Placed Per Year!
Come into Our World And SMILE!

**VENEERS
LAMINATES
ALL PORCELAIN CROWNS
ROOT CANALS
AND FILLINGS**

Gift Certificates!

UNIVERSAL
Dental Implant Center
universaldentalcenter.com

Dr. Leo Swardloff #06056
Steven Savino, DDS • Michal Bitton, DMD • Larry White, DDS
George T. Favetta, Jr., DMD • Mo Li, DDS • Dr. Lydia Khalil, DDS
Tracy Ginsberg, Board Certified Periodontist

*Insurance, abutment and crown must be completed at our office to qualify for promotional fees. This price for new patients only. Additional charges may occur for more complex cases. Ad must be presented for discount.

topDENTISTS™
AWARDED MULTI TOP DENTIST 2020

Call for a FREE Consultation:
1565 Palisade Ave.
Ft. Lee, NJ
99 New Bridge Rd.
Bergenfield, NJ
4914 Kennedy Blvd. Suite #201
West New York, NJ

FREE PARKING / PAYMENT PLANS AND FINANCING AVAILABLE / MOST INSURANCES ACCEPTED

What would you change about this ad?



Why I Love Dr. Puig

Katherine Schimmelpfennig, Rph
Pharmacist

MOST PASSIONATE ABOUT: My first and most enduring passion is my husband Randy. We married very young and had to work hard to get college degrees and good careers but because we love each other it has all been a joy.

PROUDEST MOMENT: My proudest moment would be when I passed the Florida pharmacy exam after being out of school for 11 years.

CAN'T LIVE WITHOUT: Ok, I'm shallow. I can't live without my I-phone, makeup, and credit cards!

I Love Dr. Puig

because I have spent years looking for a way to fix my smile and Dr. Puig did it in one morning!

**Dynamic
Smile
DesignSM**

Elena C. Puig, DMD, PA
Aesthetic & Restorative Dentistry

Enhancing Lives One Smile at a Time
Restorative • Cosmetic • Preventative • Dentistry

407.915.4644

1600 Hillcrest Street
Orlando, FL 32803
www.dsdoorlando.com

Learn More About Dr Puig



What is the formula for reappointment rate?

of patients with future appointments \div _____ $=$ Reappointment Rate(%)

What is your current reappointment rate? _____

What should it be?



Marketing and _____ are interconnected and inseparable.

Mark a line through the items below that AREN'T marketing.

The tone of voice you use when answering the phone

The way your food smells when you microwave it for lunch

The creases and wrinkles in your shirt

The new patient letter you sent thanking them

The postcard you sent reminding them of their appointment

Your facebook post welcoming new team members

The level of sound you produce while chewing gum

Your tone of voice on the radios

Your laughter

Your eye color

Your body language when you greet a patient

The way you comb your hair

Your letterhead

Your piercings

Your 1-1 text messaging to a patient

Your willingness to say "yes" to patients

How you handle a disagreeable patient

Your communication when going over finances

Your phone beeping to remind you to pick up your children

Whether or not you reappointment your patient

Your ability to create instant rapport

The esthetics of *your* smile

If your new patients are dropping, the 1st thing to look at is your _____, form, and chat conversion.

Surprise and Delight

When should you be giving patients a “Surprise and Delight” gift? Who Qualifies?

Brainstorm items you could put into a Surprise and Delight basket.



Who on your team will be responsible for identifying the target patients in your schedule?

Who on your team will be responsible for giving the gifts?

Who on your team will be reporting on the successes?

Something to think about:

Does your team know who your best referral sources are?

- ☐ Yes
- ☐ No
- ☐ I need help!

Take action this week!

- ☐ Keep track of where you're spending your time.
- ☐ Watch [this video](#): Handle Hard Better
- ☐
- ☐



Week five

Digital Marketing 101

What is one barrier you overcame last week?

Let's review:

Which type of marketing gives us the LOWEST rate of return?

- a. Marketing with Meaning
- b. Permission
- c. Interruption
- d. Word of Mouth

What is the conversion rate for Marketing with Meaning?

- a. 50%
- b. 70%
- c. 90%
- d. 80%

Where should we be spending most of our time?

- a. Enhancing the life of our patients through marketing with meaning
- b. Designing your next direct mail postcard
- c. Updating our Google pay per click ads
- d. Ordering SWAG



What is the formula for calculating the Average Production per New Patient (APNP)

- a. Production / amount spent
- b. # of NP's / total cost
- c. Total charge/ production
- d. Production / # of NP's

What type of ROI should we expect from marketing by Interruption?

- a. 1: 10
- b. 1:5
- c. 1:3
- d. 1:20

How many fonts are appropriate in any design?

- a. 1
- b. 2
- c. 3
- d. 4



Key Concepts we'll cover today:

- 1. _____
- 2. _____

Why it matters:



Is it worth the marketing investment?

→ From your report, how many patients have _____ (i.e. Radio; the thing you're unsure about) listed as their referral source?

→ What did those people produce? \$ _____

→ How much did you spend on _____ (i.e. Radio)? \$ _____

Formula:

$$\frac{\$ \text{Total Production}}{\text{Amount Spent}} = 1: \text{_____}$$

★ Is that good? (compare with marketing standards)

→ Are they high quality New Patients?

Formula

$$\frac{\$ \text{Total Production}}{\# \text{ of NP's}} = \text{Average Production Per NP}$$

★ Is that good? (compare with your original Value per NP, or Average Production per NP)

What in your personal life do you need to consider....is it worth it? Should I keep spending money or investing in it?

Have you decided on 1st class cabin gifts?

- ☐ Yes
- ☐ No
- ☐ I need help!

Have you decided on Surprise & Delight gifts?

- ☐ Yes
- ☐ No
- ☐ I need help!



What could you do to surprise a **New Patient** in your office?

Don't wait until the _____ of the appointment to give a gift!

1st Page Reputation

Word of Mouth and digital marketing work _____ like cogs in a gear.

Your _____ is NOT the most important thing.



What is your 1st page reputation??

1. Open an incognito window in your web browser.
2. Search for your office name with city and state.
3. Rate yourself below.

Does your office website pop up on the 1st page, above the fold?	Yes	No
Do your social media sites pop up on the 1st page?	Yes	No
Do your reviews from other sites pop up on the 1st page?	Yes	No
Are your reviews positive?	Yes	No
Is everyone on the 1st page, YOU?	Yes	No
Is your content relevant and fresh?	Yes	No
Is someone managing your 1st page reputation?	Yes	No

Add up your "Yes's" and "No's"

Is that good?

Therefore, what?

☐
☐
☐

Website Check-up

All Digital marketing goes into 4 categories:

1. Reach
- 2.
3. Convert
4. Engage

What % of people are finding your business on their mobile device? _____

Is your website easily findable online?	Yes	No
Is it easy for your patients to schedule online?	Yes	No
Is your form 3 fields or less?	Yes	No
Is your phone number everywhere?	Yes	No
Do you have a call-to-action?	Yes	No
Is your website cell responsive?	Yes	No
Do you have video testimonials and reviews?	Yes	No
Is someone managing your website and Google Insights?	Yes	No
Add up your "Yes's" and "No's"	_____	_____

Is that good?

Therefore, what?

☐
☐
☐

Recognize and CONTROL Your Digital Marketing Funnel

What digital marketing does your practice currently utilize?

What is a digital marketing funnel? It's your overall digital marketing _____.

What's possible
Search Engine Optimization
Social Media Marketing
Email Marketing
Content Marketing
Pay-Per-Click
Search Engine Optimization
Mobile Marketing
Website

THE TYPICAL DIGITAL MARKETING FUNNEL



You can't focus on only one piece of the _____.

The _____ is no longer a sufficient referral source. You need a better understanding of the how, where and why certain digital patients select your practice.

Awareness	Do People know about you?
How to find out:	Google Trends

Visibility	Can people find you?
How to find out:	Search Engine Ranking SEM Rush

Traffic	Are people visiting your site?
How to find out:	Google Analytics Google My Business Insights Social Media Insights

Inquiries by Channel	Are they engaging with you?
How to find out:	Phone calls Form submissions 2 way text conversations Live chat conversations

Conversion Rates	Are they scheduling?
How to find out:	# of appts set per channel # of NP's per channel \$\$ Treatment accepted per channel



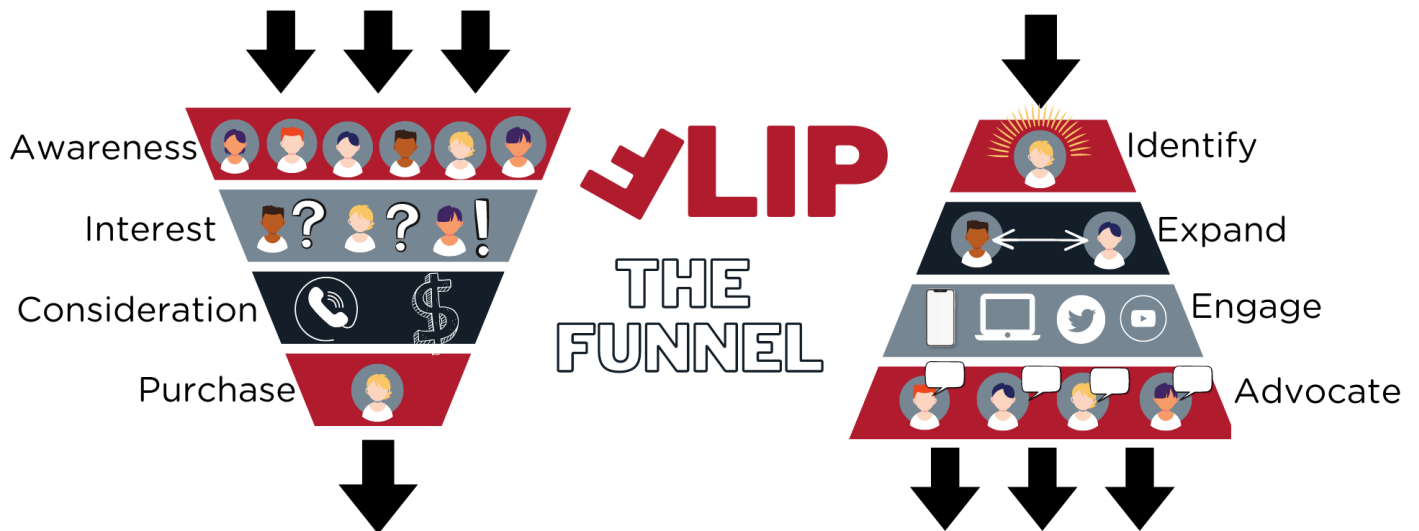
Where is the place in your digital funnel where, if you acted today, would have the biggest impact on an increase?

Increase in Visibility?

Increase in Traffic?

Increase in Inquiries?

Increase in Conversion?



Take action this week!

- ☐
- ☐
- ☐

"Spark" Office Hours

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Week Seven

Digital Marketing Do's and Don'ts

What is one unusual thing you found out about a patient, team member or referring office last week?

Let's review:

What are the 4 rules of Word of Mouth marketing?

1. Be _____, or be Invisible.
2. Make people _____.
3. _____ trust and respect.
4. Make it _____!



Which patients are in your 1st class cabin?

How many patients will you Surprise and Delight this week? How did you choose them? Who is reporting on the successes?

How do you determine the ROI of your marketing efforts?

Production  _____  _____ : _____

Consistency in execution is better than _____.

When making marketing decisions, you should always ask, “Does this make us _____?”

Key Concepts we’ll cover today:

1. _____
2. _____

Why it matters:

Digital Marketing

Who do you want as a video testimonial for your website?

- a. Ms. Jones, who just chipped her veneer.
- b. Mr. Smith, who just paid off his 90 day overdue balance.
- c. Mr. Allen, who had multiple implants placed and stated “that didn’t even hurt!”
- d. Ms. Peterson, who finally decided to invest in orthodontics for herself once her kids left and can’t stop talking about how she wishes she would’ve done it sooner.
- e. Both c. and d.

You need patients to talk about how great you are on your:

1. Website
2. On Social _____
3. In-office
4. In treatment _____

Are people more likely to believe: (circle one)

Written text on your website

Videos of real people on your website

For what procedures do you want to create videos?

What are the 5 most COMMON questions you hear every day?

1. _____
2. _____
3. _____
4. _____
5. _____

What are people searching Google for?

What type of patients should record videos?

- ☐ Were they totally wowed?
- ☐ Do they have an outgoing, enthusiastic personality type?
- ☐ Have they done a lot of dentistry?
- ☐ Have they paid their bill?
- ☐ Have they completed the procedure you want to promote?
- ☐ Do they know a lot of people?



Rules for recording videos:

1. The person who knows the patient _____, should record the video. (Not the Dr.)
2. Turn your phone _____.
3. Ask the patient open-_____ questions.
4. Choose wisely.
5. Your video shouldn't be longer than _____ seconds.
6. It's okay if they're not perfect.



What questions do you want to ask patients during their video?

When was the last review made on Google? Date: _____

When was the last review made on Facebook? Date: _____

Is that good?

Best Practices for Email Marketing

1. Write compelling subject lines.

Circle which subject line is better:

Invisalign Day is Tomorrow	Or	Last Chance to Save \$1000!
Learn more about Invisalign	Or	Only 5 appointments left!
Tired of bad breath?	Or	Hello, from ABC Dental

2. Avoid Font Soup.

Avoid **FONT SOUP**

3. Keep your main message and call to action above the fold.



4. Send _____x/week

5. Keep it quick...between 50-125 words.

6. Keep the text to an F-shaped pattern for easier skimming.

THE JOINT chiropractic No Appointments. Convenient Hours. Licensed Chiropractors. |

Your back pain could be relieved with a simple adjustment.

✓ Consultation ✓ Exam ✓ Adjustment

"You should plan around 20 minutes for your first visit, though follow-up visits can take as few as five minutes or so. At the end of your visit, your doctor will determine the best treatment plan for your specific needs."

Sam W. - San Antonio, TX

\$29 Initial Visit
✓ Consultation ✓ Exam ✓ Adjustment

Your Name...
Your Email Address...
Selection clinic nearest you...
How can we help you?
Get Your Introductory Offer

Our mission is to improve quality of life through affordable and routine chiropractic care. A Clinic Near You

You should plan around 20 minutes for your first visit, though follow-up visits can take as few as five minutes or so. At the end of your visit, your doctor will determine the best treatment plan for your specific needs. Some conditions may be resolved in one visit, while many people require and prefer routine chiropractic care to remain healthy, and of course, feel their best. You can even save more on your care by becoming a member of The Joint.

Accessible Healthcare Without Insurance Limitations

We're conveniently located throughout the U.S., so you can find us near your neighborhood grocery store or coffee shop, or even on your way to and from work - and you never need an appointment or a referral to be seen on your schedule!

Best of all, our membership plans cost even less than most co-pays. And while you don't need to be a member to be seen at The Joint, it's a great way to save on your healthcare needs and make your health the priority it deserves to be.

To Help You Live Well

You don't have time to be in pain or deal with nagging aches. But you do have time to take a few scant minutes each week to take care of yourself. At The Joint, patients discover how important routine chiropractic care is to their overall health and well-being. Take just a few minutes each month to maintain a healthy spine and restore balance a relaxing experience you'll want to have again and again.

*Offer valued at \$39. Valid for new patients only. See clinic for chiropractor(s)' name and license info. Clinics managed and/or owned by franchisee or Prof. Corps. Restrictions may apply to Medicare eligible patients. Individual results may vary.

7. Test, Test, and Re-test. Send a copy to _____ first to verify personalization, working links and formatting.

Social Media Marketing



Post _____ to stay relevant.

- a. sometimes
- b. often
- c. whenever something funny happens
- d. everything

Plan ahead and SCHEDULE posts.



_____ posts that are already gaining traction.

Have fun, but keep it _____.

- a. classy
- b. professional
- c. consistent with practice branding
- d. All the above

Check insights!

Goal: Your reach and engagement



“Likes.”

(Circle one)

Take action this week!

☐ Watch [this video](#): Practice to be the greatest!

☐☐☐☐

Week Eight

Test, Track, Adjust

What's one thing you did to be *interesting* last week?

Let's review:

Why are videos on your website better than text?

People don't like to _____.



How does Marketing with Meaning tie into your mission statement?

What are the two types of currency? _____ and _____.

Instead of measuring body count, what should you measure? Rev_____.

Why is your 1st Page Reputation more important than your website?

- a. Because most people never make it to the website.
- b. Because websites are a thing of the past..
- c. Because no one's website is updated anyway.
- d. Because websites are incompatible with mobile devices

Key Concepts we'll cover today:

1. _____
2. _____

Why it matters:

List the reports you need to pull MONTHLY

- 1.
- 2.
- 3.
- 4.

Your role as Marketing Coordinator or Practice Ambassador is to:

Develop a _____ at the front end

Report on the _____ at the back end.

T.

T.

A.



Practice makes Progress

Pull your New Patient list from last month and add the “type” column (Interruption, Permission, Marketing with Meaning).

How much **production** came from each type?

Interruption Production: \$ _____

Permission Production: \$ _____

MWM Production: \$ _____



How much did you **spend** on each of the marketing types?

\$\$\$ Spent on Interruption: \$ _____

\$\$\$ Spent on Permission: \$ _____

\$\$\$ Spent on MWM: \$ _____

Take the production from each category and divide by the \$\$\$ spent to determine your **ROI**.

ROI for Interruption: 1: _____

ROI for Permission: 1: _____

ROI for MWM: 1: _____

RETURN ON INVESTMENT (ROI)

Total Production



Amount Spent

Is this good?

Now, determine the new patient value. Remember, **production beats body count!**

VALUE PER NP

Total Production



of NP's

Is that good?

Next, sort by production to determine your _____ cabin patients.

Any patients over \$_____ are in your 1st class cabin.

Look at your procedure code report.

How many comprehensive exams did you do? _____

How many total new patients did you see? _____

What is your goal? _____



What was your New Patient production for the month? \$ _____

What was your TOTAL production for the month? \$ _____

What percentage of your production came from NP's? _____%

REAPPOINTMENT RATE

of patients reappointed



What is your reappointment rate?

How many total patients did you see? _____

Total patients seen

How many have another appointment? _____

Divide how many have another appointment, by the TOTAL and that is your reappointment rate.

_____%

What is YOUR PRACTICE's goal?

Based on the above, is your marketing working?



Something to think about:

What needs to be improved operationally, so you're better able to convert marketing leads into happy, paying patients, who repeat and refer?

Take action this week!

- ☐ Watch [this video](#): Success Isn't Linear
- ☐ Practice pulling the reports you'll need every month for different periods of time. Work at reducing the need for instructions, so it will become effortless when it's time.
- ☐
- ☐
- ☐

Week Nine

Community Impact Made Simple

How did you make someone's day this week?

Let's review:

Why do you want to reward your 1st class cabin patients?

What does T. T. A. stand for?

_____ Trumps Body Count.

What does the acronym F.O.R.M mean?

F=

O=

R=

M=

What are 2 things you've done to help the team "buy in" to your marketing efforts?

1.

2.

Marketing and _____ are interconnected and inseparable.

Key Concepts we'll cover today:

1. _____

2. _____

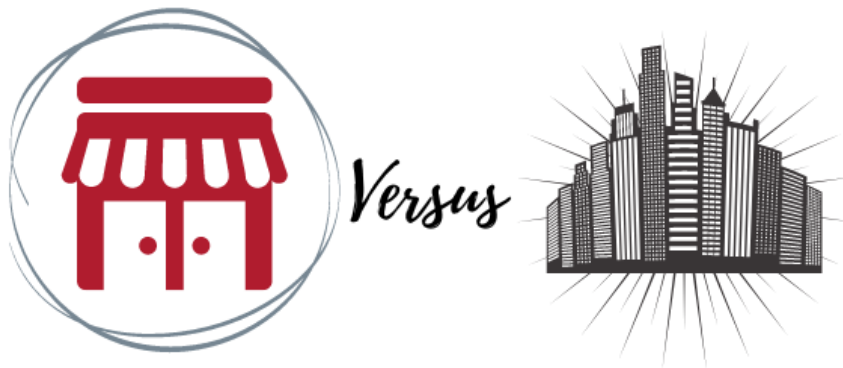
Why it matters:

B2B and Event Marketing

What employers are your best patients coming from?

How can you get more patients from that employer?

Start with small employers. You want to build something around the people that already_____ you!



Community Involvement

What is the point of Community Involvement?

Ensure Community events are included in your yearly _____.

Change all words from “Giving Back” to _____.

Promote online with pictures, and especially the WHO, WHAT, WHEN, WHERE and _____.



What community charities align with who you are?

What community events do you want to be involved in?

Take action this week!

- ☐ Start filling in the blanks using the marketing budget spreadsheet to develop a 12 month budget and plan for your marketing dollars.
- ☐ Watch [this video](#): How Successful People Think
- ☐
- ☐
- ☐

Week Ten

A Realistic Budget and Plan Designed For You, By You

What is one “ah-ha” moment you had since we last met?

Let's review:

What is your expected rate of return for Marketing with Meaning? 1: _____

What is the formula for determining your production per New Patient?

Total NP Production \div _____ = _____

The “best” gift for a patient is one that is customized to the patient’s likes, and delivered to their home or place of business, a week or 2 before their appointment. True False

“Giving Back” should be replaced with “_____”.

_____ is better than Perfection.

Key Concepts we'll cover today:

1. _____
2. _____

Why it matters:

What are you going to stop doing, so at least 25% of your time is focused on marketing? For Practice Ambassadors, how are you going to protect your time?



Developing a marketing budget

After developing the budget, complete the table below.

Type of Marketing	Budgeted Spend	Percentage of total	Multiply by?	Expected ROI
Interruption	\$	%		\$
Permission	\$	%		\$
Marketing w/Meaning	\$	%		\$

If you have the same ROI as you've had in the past (determined in lesson 1), your ROI for Marketing with Meaning would be:

To determine how many *NP's a month* you need to meet the "expected ROI" above:

Add up the "expected ROI" amount and

DIVIDE by your typical Average Production Per New Patient (or NP Value)



$$\frac{\$ \text{Total expected ROI}}{\text{Your APNP}} = \text{Total NP's/year}$$

$$\frac{\text{Total NP's/year}}{12 \text{ months}} = \text{NP's/Month}$$

What are you going to do to teach everyone on your team their role in marketing?

Dental Assistants-

Business Assistants/OM's-

Hygienists-

Doctors-

Something to think about:

If Marketing with Meaning is relationship-based marketing, what does relationship-based case acceptance and dentistry look like?

Take action this week!

☐ Watch [this video](#): Denzel Washington's Life Advice

☐☐☐☐

Week Eleven

Creating Your Practice Marketing Routine

What made this week AWESOME?

Let's review:

List below your purpose as Marketing Director or Practice Ambassador.

What is your overall yearly budget for marketing? \$_____

What percentage are you going to spend on Marketing with Meaning? _____%

Should you include existing patient retention in your marketing budget?

☐ Yes

☐ No

_____ of your patients generate 80% of your revenue.

Word of Mouth Marketing isn't _____.

We must remove the emotion from our data, so we can _____.

All patients are not created _____.

Key Concepts we'll cover today:

1. _____
2. _____

Why it matters:

What are you doing consistently (Every day, or 1x/weekly) to show the team the successes of your/their marketing efforts?



Create a list of your daily, weekly and monthly marketing duties

			Reporting	Community Events
Daily				
Weekly				
Monthly				

Take action this week!

- ☐ Watch [this video](#).: The Time You Have (in Jellybeans)
- ☐ Look ahead to next week and prepare to present your results from the last 12 months to the group next week, as if you were presenting to the owners/doctors of your practice.
- ☐
- ☐
- ☐

Week Twelve

Let's Take Action!

Assignment:

1. Process all of your reports for the last 12 months.
2. Determine the success of your marketing efforts.
3. Test, Track, Adjust
4. Report.



COST PER NP

Amount Spent



of NP's

RETURN ON INVESTMENT (ROI)

Total Production



Amount Spent

VALUE PER NP

Total Production



of NP's

FORMULAS

TO REMEMBER

W.O.M. FACTOR

of Patients Referred



Total NP's

3 Types of Marketing & their effectiveness

Type	Financial Investment	Time Investment	ROI	Conversion Rate	Speed of Acquisition
Interruption (advertising)	\$\$\$		1:3	50%	
Permission (Digital)	\$\$		1:10	70%	
Marketing w/ Meaning (PR and Community)	\$		1:20	90%	

List the 4 reports you'll need to pull each month

- 1.
- 2.
- 3.
- 4.

How'd you do?

- a. I think I need more help...
- b. I rocked it!
- c. I rocked it AND I think I need more help...



LET'S CONTINUE THE CONVERSATION...

Please let me know if you would like to continue discussing ways My Dental CMO can help simplify your dental marketing and excel your practice to the next level.



MyDentalCMO@gmail.com



614.655.1173



@K14Nation



MyDental
CMO

Appendix

COST PER NP

Amount Spent



of NP's

RETURN ON INVESTMENT (ROI)

Total Production



Amount Spent

VALUE PER NP

Total Production



of NP's

FORMULAS TO REMEMBER

W.O.M. FACTOR

of Patients Referred



Total NP's

ONLINE SUCCESS

Reach
Engagement



Likes

REAPPOINTMENT RATE

of patients reappointed



Total patients seen

IS IT WORTH IT? SHOULD I KEEP DOING IT?

RETURN ON INVESTMENT (ROI)

Total Production from
expenditure in question



Amount Spent



Compare with industry standards

1:3 Interruption
1:10 Permission
1:20 Interruption



ARE THEY HIGH QUALITY NP'S?

Total Production



of NP's



Compare with Original Avg.
Production Per NP

Video Resources

- ▶ Dan Heath: Build Peaks, Don't Fix Potholes
- ▶ How to Achieve a Growth Mindset
- ▶ Life Vest Inside Kindness Boomerang One ...
- ▶ Kara Lawson: Handle Hard Better
- ▶ Practice to be the greatest! | Deion Sanders ...
- ▶ Success isn't linear
- ▶ How Incredibly Successful People THINK
- ▶ Denzel Washington's Life Advice Will Leave ...

WHAT do I get them?

Try local! Look for someone in your area who makes custom baskets, introduce yourself and explain what you are looking for.

- When it is time for one to be sent all you have to do is make a phone call

<https://www.oliveandcocoa.com/>

<https://www.williams-sonoma.com/>

<https://bouqs.com/>

<https://www.mancrates.com/>

<https://urbanstems.com/>

<https://www.goldbelly.com/>

<https://www.homewetbar.com/>

<https://milkbarstore.com/>

<https://www.1800baskets.com/>

<https://www.harryanddavid.com/>

<https://www.thebrobasket.com/>

<https://www.gifts.com/>

<https://www.ediblearrangements.com/>

<https://www.minted.com/>

<https://www.stonewallkitchen.com/>

<https://www.thegrommet.com/>

<https://www.uncommongoods.com/>

<https://shopboxfox.com/>

<https://farmgirlflowers.com/>

<https://www.gifftree.com/>

20
Examples
with gifts
between
\$50 &
\$100

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

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