



The PatientPath Marketing Planner

Your plan to diversify your patient base—and gain more followers, leads, and treatment acceptance.

Brand Design

Keep your brand colors, fonts, and voice consistent throughout all marketing to help with brand recognition.

Colors: _____

Fonts: _____

Tagline: _____

Brand Voice: _____

Brand Value Statement: _____

Services to Promote: _____

Practice Goals

Know your target audience: where they like to shop, what sites they like to visit, and what social platforms they use the most. This will help you decide where best to put your marketing dollars to work.

Primary Audience:

Secondary Audience:

Focus of Our Marketing Efforts:

- ---

- ---

- ---

New Patient Appointment Goal:

•

 / month

Marketing Budget

\$

 Total Marketing Spend of Previous
Year ÷

 Total Number of New Patients
Previous Year = Your Cost Per New Patient

Pro Tip: Use this formula to calculate your new budget based on your growth goals.

Monthly:

Annually:

Marketing Strategy

A good marketing strategy can be summed up into one sentence. The clearer and more direct your strategy is, the easier it is to execute. When creating marketing materials, try focusing on one or two key benefits to make sure your message stays clear.

Community Strategy: _____

Measurement: _____

Doctor Referral Strategy: _____

Measurement: _____

Patient Referral Strategy: _____

Measurement: _____

Brand Awareness Strategy: _____

Measurement: _____

Lead Generation Strategy: _____

Measurement: _____

Other: _____

Measurement: _____

Social Media Strategy

Pro Tip: Ideally, you'll want to choose a hashtag that has no other posts associated with it to make sure that your content is the only content your audience sees. Another pro tip is to create template designs that allow you to easily post content quickly when you need it. This also adds to your brand consistency because you're not reinventing the wheel every time you create a new post.

Brand Hashtag(s): _____

Monthly Posting Themes: _____

Monthly Plan

Month 1 _____

Doctor

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Patient

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Community

Date: _____

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Tactic: _____

Date: _____

Tactic: _____

Digital

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Monthly Plan

Month 2 _____

Doctor

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Patient

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Community

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Tactic: _____

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Tactic: _____

Digital

Date: _____

Tactic: _____

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Tactic: _____

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Tactic: _____

Monthly Plan

Month 3 _____

Doctor

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Patient

Date: _____

Tactic: _____

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Tactic: _____

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Community

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Tactic: _____

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Tactic: _____

Monthly Plan

Month 4 _____

Doctor

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Tactic: _____

Date: _____

Tactic: _____

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Tactic: _____

Patient

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Tactic: _____

Date: _____

Tactic: _____

Community

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Tactic: _____

Digital

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Tactic: _____

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Tactic: _____

Date: _____

Tactic: _____

Monthly Plan

Month 5 _____

Doctor

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Patient

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Tactic: _____

Date: _____

Tactic: _____

Community

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Tactic: _____

Date: _____

Tactic: _____

Digital

Date: _____

Tactic: _____

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Tactic: _____

Date: _____

Tactic: _____

Monthly Plan

Month 6 _____

Doctor

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Tactic: _____

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Tactic: _____

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Tactic: _____

Patient

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Tactic: _____

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Tactic: _____

Digital

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Tactic: _____

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Tactic: _____

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Tactic: _____

Monthly Plan

Month 7 _____

Doctor

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Tactic: _____

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Tactic: _____

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Tactic: _____

Patient

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Community

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Digital

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Tactic: _____

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Tactic: _____

Monthly Plan

Month 8 _____

Doctor

Date: _____

Tactic: _____

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Tactic: _____

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Tactic: _____

Patient

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Tactic: _____

Monthly Plan

Month 9 _____

Doctor

Date: _____

Tactic: _____

Date: _____

Tactic: _____

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Tactic: _____

Patient

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Tactic: _____

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Tactic: _____

Community

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Digital

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Tactic: _____

Monthly Plan

Month 10 _____

Doctor

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Tactic: _____

Patient

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Monthly Plan

Month 11 _____

Doctor

Date: _____

Tactic: _____

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Monthly Plan

Month 12 _____

Doctor

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Tactic: _____

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Tactic: _____

Patient

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Tactic: _____

Digital

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Date: _____

Tactic: _____

Other Tactic Details

Notes:

This image shows a blank sheet of white paper with horizontal blue lines, resembling notebook paper. The lines are evenly spaced and run across the width of the page. In the top right corner, there is a light blue decorative swirl. In the bottom left corner, there is a yellow circular outline with a light blue swirl behind it. The rest of the page is empty.



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