

# Monthly Marketing Review and Planning Checklist

This is just a sample.

Customize to suit your situation. Try to keep it regular each month. Have fun helping more people.

**Goal:** Review past performance and make new, or revise as needed, practical plans and action steps that will generate more new patients, reactivated patients, and retained patients.

**Meeting venue.** Meetings are held routinely each month at a location and time where attendees can enjoy themselves. The manager is in charge of the meeting and should consider each monthly meeting as an entertainment event! Fun and a little crazy is fine. Unserious.

## **Procedure.**





1. List internal and external special marketing actions, and who is responsible. Add special dates if applicable.
2. Once per month (second week), in a team meeting, review how each marketing action worked. Grade it.
3. Based upon the prior months performance, make new plans for the next 4-8 weeks.

Review the marketing checklist. Categories can be delegated to a team member.

Month Ending: \_\_\_\_\_ 2025\_\_

## STATISTICS

(sample)

New Patients: \_\_40\_\_  1 month  3 months    Reactivated Patients: \_\_10\_\_  month  months

Effectiveness of Project/Activity: 1 Didn't work 3 Worked OK 5 Worked Great.			
	Who's responsible	List Special Dates/Times	
<b>Internal</b> (routine procedures. Friendly, interested, caring, expert.)			1-2-3-4-5
• Patient newsletter	Bert	2 and 4 <sup>th</sup> Tues	1-2-3-4-5
• New adjustment call	Doc's	Daily	1-2-3-4-5
• Birthday cards	Ernie	weekly	1-2-3-4-5
• Welcome card			1-2-3-4-5
• Special promotions.			1-2-3-4-5
• Referral programs. (Care to Share)			1-2-3-4-5
• Patient Education			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
<b>External</b>			1-2-3-4-5
• Internet (Google, etc.)			1-2-3-4-5
• Website			1-2-3-4-5
• Social media			1-2-3-4-5
• Advertising			1-2-3-4-5
• Community Events: workshops, screenings			1-2-3-4-5
• Allies – Community Referral Sources			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
•			1-2-3-4-5
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•			1-2-3-4-5

# MONTHLY MARKETING PLAN (For the next 4-8 weeks.)

Month Ending: \_\_\_\_\_ 2025\_

## STATISTICS

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