**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\_\_** 🡹 🡻 1 month 🡹 🡻 3 months

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| *Effectiveness of Project/Activity:* **1 Didn’t work 3 Worked OK 5 Worked Great**. |
|  | Who’s responsible | List Special Dates/Times |  |
| **Internal** (**r**outine procedures. Friendly, interested, caring, expert.)  |  |  | 1-2-3-4-5 |
| * Patient newsletter
 | Bert | 2 and 4th 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 |
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| **External** |  |  | 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
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**MONTHLY MARKETING PLAN** (For the next 4-8 weeks.)

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

**STATISTICS**

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| **External** |  |  | 1-2-3-4-5 |
| * Website
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