

Monthly Marketing Review and Planning Checklist

SAMPLE

{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 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.
















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

Month Ending: August 2025

1. STATISTICS

New Patients: 42  1 month  3 months Reactivated Patients: 16  1 month  3 months

2. REVIEW

Effectiveness of Project/Activity: 1 Didn't work 3 Worked OK 5 Worked Great.		
	Who's responsible	
Internal (routine procedures. Friendly, interested, caring, expert.)		1-2-3-4 
• New adjustment call	Sue	1-2-3-4 
• Birthday cards	Sue	1-2-3-4 
• Welcome card	Betty	1-2-3-4 
• Newsletter.	Sam	1-2-3-4 
• Special promotions.	Sam	1-2-3-4 
• Referral programs. (Care to Share)	Jane	1-2-3-4 
• Patient Education	Craig	1-2-3-4 
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External		1-2-3-4 
• Internet (Google, etc.)	Beth	1-2-3-4 
• Website	Beth	1-2-3-4 
• Social media	Stan	1-2-3-4 
• Advertising	Dr. Smith	1-2-3-4 
• Community Events: workshops, screenings	Stan	1-2-3-4 
• Allies – Community Referral Sources	Stan	1-2-3-4 
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3. PLAN

Plan for the next 4-8 weeks.

New actions and or improvements. (who is in charge?) .		
	Month: _____	Following Month: _____
• New adjustment call		
• Birthday cards		
• Welcome card		
• Newsletter.		
• Special promotions.		
• Referral programs. (Care to Share)		
• Patient Education		
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External		
• Internet (Google, etc.)		
• Website		
• Social media		
• Advertising		
• Community Events: workshops, screenings		
• Allies – Community Referral Sources		
• Other		
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