

The **MARKETING CHECKLISTS - INTERNAL**

For Selection, Review, and Assessment of Practice Marketing Projects

(See *Marketing Manager* for more information.)



Review Every Twelve Months , or as needed.

1. Marketing Management.
(Assigned to: _____.)

Reviewed Every Three Months, or as needed.

2. Internal: Marketing Motivation
(Assigned to: _____.)
3. Internal: Extra-Ordinary Service (Assigned to: _____.)

4. Internal: General Internal
(Assigned to: _____.)
5. Internal: Patient Education
(Assigned to: _____.)
6. Internal: Patient Referrals
(Assigned to: _____.)
7. Internal: Recall/Retention/Reactivation
(Assigned to: _____.)

Date of Selection, Review, and or Assessment: _____

1. MARKETING MANAGEMENT		Assigned to: _____						
Select Activity to be performed:	Effectiveness of Project/Activity: 1 = Worked Well 2 = Worked OK 3 = Didn't work too well							
Recurring Activity	Scheduled Activity	Frequency of Use:	1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often					
<input checked="" type="checkbox"/>	Review, assess, & select once every 12 months, or as needed.	Fill In ⇒	1	2	3	1	2	3
<input type="checkbox"/>	1. Marketing Director. Clinic Director assumes role also as Marketing Director, and oversee all marketing activities.		□	□	□	□	□	□
<input type="checkbox"/>	2. Marketing Director. Marketing Director to schedule time each week dedicated to marketing activities.		□	□	□	□	□	□
<input type="checkbox"/>	3. Marketing Coordinator. A staff member acts as the Marketing Coordinator for the office, and schedules at least 2 hours each week for this function.		□	□	□	□	□	□
<input type="checkbox"/>	4. Statistics. Keep new patient statistics and track their sources carefully (such as "No. of New Pts. From Yellow Pages, etc.)		□	□	□	□	□	□
<input type="checkbox"/>	5. Goals. Set new patient goals each month for the upcoming 1-2 months.		□	□	□	□	□	□
<input type="checkbox"/>	6. Past Successful Activities. Put together a list of marketing activities that have previously worked. (See checklist #13.)		□	□	□	□	□	□
<input type="checkbox"/>	7. Planner. Fill out a Marketing Planner each month for the next 3 months.		□	□	□	□	□	□
<input type="checkbox"/>	8. Marketing Calendar. Display Marketing Calendar for all to see, and update each month.		□	□	□	□	□	□
<input type="checkbox"/>	9. Recurring Procedures. Keep a list of recurring marketing procedures and updated every three months.		□	□	□	□	□	□
<input type="checkbox"/>	10. Monthly Planning. Review the marketing planner every month with the clinic director/staff and update it with new or adjusted SCHEDULED projects and action steps.		□	□	□	□	□	□
<input type="checkbox"/>	11. Weekly Coordination. Marketing Coordinator ensures all planned projects are on track each week.		□	□	□	□	□	□
<input type="checkbox"/>	12. Quarterly Coordination. Every three months, all recurring procedures are reviewed.		□	□	□	□	□	□
<input type="checkbox"/>	13. Marketing Director. The clinic director, as also the marketing director, personally supervises long range marketing plans on a monthly basis.		□	□	□	□	□	□

<input type="checkbox"/>	14. Delegation. Marketing activities are delegated to other staff by marketing director with Mktg Coordinator's help.	□□□	□□□
<input type="checkbox"/>	15. Filing. All filing is kept up to date each month.	□□□	□□□
<input type="checkbox"/>	16. Community Events. Someone assigned to keep a comprehensive list of upcoming community events from Chamber of Commerce, and other sources, and keep it updated each month.	□□□	□□□
<input type="checkbox"/>	17. Segmentation. Every three months, look over calendars and check with your local Chamber of Commerce, and other community organizations, for a list of 3 upcoming events over the next three months (e.g. Christmas, Halloween, health fairs, festivals, etc.) and tie these into your upcoming marketing plans.	□□□	□□□
<input type="checkbox"/>	18. Budget. Marketing Coordinator and/or Marketing Director do quarterly marketing budgeting.	□□□	□□□
<input type="checkbox"/>	19. Training. The staff and doctors receive some kind of training and re-training related to patient service, quality communication, referral procedures, preparation before special promotions, etc. at least once per quarter.	□□□	□□□
<input type="checkbox"/>	20. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	21. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	22. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	23. Capacity Goals. Set long-range goals defining the realistic comfort capacity of doctor and office.	□□□	□□□
<input type="checkbox"/>	24. Monthly Report. Send in marketing <u>planner</u> each month to Clinic Director and marketing consultant , along with the new patient tracker and basic monthly stats.	□□□	□□□
<input type="checkbox"/>	25. Services. The clinic director to review scope of services, and add or subtract new services and products to be delivered and sold at the clinic, as needed, in the last 6 months.	□□□	□□□
<input type="checkbox"/>	26. Fees. The clinic director to thoroughly review the fees charged by the office in the last 9 months, and adjust them appropriately.	□□□	□□□
<input type="checkbox"/>	27. Brand. As Mktg Dir., the clinic director effectively ensures that all communication inside and outside of the clinic emphasizes the unique and special benefits of the services and products offered at your clinic.	□□□	□□□
<input type="checkbox"/>	28. Positioning Strategy. A strategic plan is implemented to ensure that the office has a unique and effective marketing "position".	□□□	□□□
<input type="checkbox"/>	29. Market Segmentation. A list of 5 different groups or "markets" that you usually treat as patients or could treat (elderly, children, employees of a local factory, accident victims, people with certain conditions like Fibromyalgia, ethnic groups, etc), is defined and a plan to generate NP's from these segments is developed.	□□□	□□□
<input type="checkbox"/>	30. Systems Assessment: Assess and grade the effectiveness and frequency of systems in this department at least once in the last 12 months.	□□□	□□□
<input type="checkbox"/>	31. Systems Assessment: Job Performance. The Marketing coordinator is upbeat, keeping to his/her schedule, complying with procedures, and effectively coordinating all marketing activities such that the statistics are improving.	□□□	□□□
<input type="checkbox"/>	32. Systems Assessment: Statistics. New patients and office visits are consistently at 85% or higher of the capacity goals originally established.	□□□	□□□
<input type="checkbox"/>	33. Write in your own procedures here	□□□	□□□
<input type="checkbox"/>	34. Write in your own procedures here	□□□	□□□
<input type="checkbox"/>	35. Write in your own procedures here	□□□	□□□

2. MOTIVATION		Assigned to: _____						
Select Activity to be performed:		Effectiveness of Project/Activity: 1 Worked Well 2 Worked OK 3 = Didn't work too well						
Recurring Activity	Scheduled Activity	Frequency of Use: 1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often						
<input checked="" type="checkbox"/> Review, assess, & select once per month, or as needed.		Fill In ⇒	1 2 3			1 2 3		
<input type="checkbox"/>	1. Each Day – PMA. Work each day to create a Positive Mental Attitude toward that day's work.		□	□	□	□	□	□
<input type="checkbox"/>	2. Team Spirit Maintained. Doctor(s) and staff pay special attention to <i>increase</i> and keep the team morale HIGH for each other as a team, staff, doctors, management, owners, etc.		□	□	□	□	□	□
<input type="checkbox"/>	3. Marketing Attitudes. Read, review and <i>work</i> to maintained "Successful Marketing Attitudes" on a weekly basis (see article in "Mkt. Mgr. Binder").		□	□	□	□	□	□
<input type="checkbox"/>	4. Demand. Each day, the <u>marketing director</u> WANTS to develop the practice, & positively demands that the practice grow.		□	□	□	□	□	□
<input type="checkbox"/>	5. Desire. Each day, the <u>marketing coordinator</u> strongly desires the development of the practice.		□	□	□	□	□	□
<input type="checkbox"/>	6. Service Orientation. Each week, at staff meetings or during the day, doctors and staff keep <u>each other</u> focused towards marketing and patient service, rather than on insurance limitations, accounts payable, or other admin. challenges.		□	□	□	□	□	□
<input type="checkbox"/>	7. Purpose. Each week at staff meetings and during the day, the clinic leader maintains a clear sense of mission. She or he is enlivened by it, and inspires the staff, doctors, patients, and community about the mission of the office.		□	□	□	□	□	□
<input type="checkbox"/>	8. New Patient Goals. Each day and each week, monthly, weekly, and daily new patient goals are set.		□	□	□	□	□	□
<input type="checkbox"/>	9. Morning Rally and "Pre-view" . Doctor(s) and FD CA start each day by getting to the office at least 10 minutes before the first patient to "preview" the day, and plan out promotional, patient educational, and service actions for that day, and end on a motivational theme.		□	□	□	□	□	□
<input type="checkbox"/>	10. Chiropractic News. Doctor(s) and staff read and discuss positive chiropractic news stories each month.		□	□	□	□	□	□
<input type="checkbox"/>	11. Patient Success. At least once per month, doctor(s) & CA's review at least 3 patient successes together.		□	□	□	□	□	□
<input type="checkbox"/>	12. Staff Motivation. Staff talked to each other each day about how they had room to see more new patients.		□	□	□	□	□	□
<input type="checkbox"/>	13. Compliments. Doctors and staff compliment each other for excellent job performances each week.		□	□	□	□	□	□
<input type="checkbox"/>	14. Mission of Office. Doctor and staff review the office mission the each month and discuss how to better apply it.		□	□	□	□	□	□
<input type="checkbox"/>	15. Bonus System. Some kind of regular bonus system for new patients, office visits, or some other measure of volume is in place.		□	□	□	□	□	□
<input type="checkbox"/>	16. Game. Establish and participate in a game or challenge for the staff with rewards based upon performance goals achieved.		□	□	□	□	□	□
<input type="checkbox"/>	17. Motivational Resources. Each month doctor(s) & CA's read & discuss motivational literature, tapes, videos, sayings, etc.		□	□	□	□	□	□
<input type="checkbox"/>	18. Motivational Quotes. Each week, doctor(s) and C.A.'s read a motivational quote and discuss how to apply it in practice. (See the Marketing Tool Kit, "Motivation" section.)		□	□	□	□	□	□
<input style="background-color: red;" type="checkbox"/>	19. Seminar. Doctor(s) and staff scheduled for an upcoming philosophy and/or motivation seminar in the next six months		□	□	□	□	□	□
<input type="checkbox"/>	20. <i>Write in your own procedures here.</i>		□	□	□	□	□	□
<input type="checkbox"/>	21. <i>Write in your own procedures here.</i>		□	□	□	□	□	□

3. EXTRA-ORDINARY SERVICE PROCEDURES		Assigned to: _____								
Select Activity to be performed:		Effectiveness of Project/Activity: 1 Worked Well 2 Worked OK 3 = Didn't work too well								
Ongoing Activity	Scheduled Activity	Frequency of Use: 1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often								
<input checked="" type="checkbox"/>	Review, Assess, & Select once every three months, or as needed.	Fill In ⇒			1	2	3	1	2	3
<input type="checkbox"/>	1. Reception. Warmly greet each person that enters the office with a smile, handshake, or whatever is appropriate to make each person feel very special and welcomed.									
<input type="checkbox"/>	2. Gratitude Attitude. Demonstrate the "gratitude attitude" with all new patients. Let them know that you are grateful that they chose you, and continue to choose your office.									
<input type="checkbox"/>	3. Guests. Treat each person that is in your office as a <u>guest</u> , and go out of your way to make them feel "at home", and important.									
<input type="checkbox"/>	4. Communication. Always maintain <u>positive</u> and <u>ample</u> communication with everyone in the office, both staff and non-staff each day.									
<input type="checkbox"/>	5. Patient Interest. All staff genuinely interested IN <u>each patient</u> when they work with him or her as if that was the clinic's only patient.									
<input type="checkbox"/>	6. Happy Clinic. Work each day to make the practice more upbeat and harmonious.									
<input type="checkbox"/>	7. Phone Greeting. Warmly greet each person that calls your office with a smile.									
<input type="checkbox"/>	8. Reception Room. Treat the reception room as " <u>receiving</u> " room not a waiting room.									
<input type="checkbox"/>	9. No Waiting Time. Allow little to no waiting for patients. Never more than ten minutes.									
<input type="checkbox"/>	10. Patient Transportation. Assist in patient transportation whenever needed.									
<input type="checkbox"/>	11. Bottlenecks. Locate and help to correct any service bottlenecks or constraints that could discourage more service volume.									
<input type="checkbox"/>	12. Service Encounter. Help create at least one major extra-ordinary and outrageous service encounter with at least one patient each month.									
<input type="checkbox"/>	13. Child Care. Assist in the care of children when they are in the office.									
<input type="checkbox"/>	14. New Patient Call. Call each new patient the night after his or her first adjustment.									
<input type="checkbox"/>	15. Welcome Letter. Send each new patient a "welcome letter".									
<input type="checkbox"/>	16. Cards. Send out all birthday and holiday cards to patients.									
<input type="checkbox"/>	17. Patient Paperwork. Ensure all new patient paperwork and other forms are complete and easy to for patients to fill out.									
<input type="checkbox"/>	18. Beverages. Provide bottled water or other beverages for patients.									
<input type="checkbox"/>	19. Fruit. Schedule a time period to provide fresh apples for patients.									
<input type="checkbox"/>	20. Treats. Have a special day of treats in the office, such as cookies from a local bakery with apple cider.									

To: Clinic Director From: _____
Marketing Manager System (www.pmaworks.com)

Date: _____

<input type="checkbox"/>	21. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	22. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	23. Write in your own procedures here.	□□□	□□□

4.		GENERAL INTERNAL			Assigned to: _____		
Select Activity to be performed:		<i>Effectiveness of Project/Activity: 1 = Worked Well 2 = Worked OK 3 = Didn't work too well</i>					
Ongoing Activity	Scheduled Activity	<i>Frequency of Use: 1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often</i>					
<input checked="" type="checkbox"/> Review, assess, & select once every three months, or as needed.		Fill In ⇨					
					1	2	3
					1	2	3
<input type="checkbox"/>	1. Clean Office. Ensure that the office is clean and neat, including bathrooms, well ventilated, and heated or cooled.				□□□	□□□	
<input type="checkbox"/>	2. Share the benefits of your services with other patients.				□□□	□□□	
<input type="checkbox"/>	3. Compliments. Staff to compliment doctor to other patients.				□□□	□□□	
<input type="checkbox"/>	4. Professional Appearance. Ensure that the appearance of staff and doctors is professional.				□□□	□□□	
<input type="checkbox"/>	5. Bulletin Board. Keep the bulletin board current with promotional themes, interesting and informative for patients.				□□□	□□□	
<input type="checkbox"/>	6. Answering Machine. Call in at least two times each month to ensure that your answering machine (or service) is picking up quickly, and that the message is clear and very friendly.				□□□	□□□	
<input type="checkbox"/>	7. "Patient of the Month". Display a picture and success story of a "Patient of the Month".				□□□	□□□	
<input type="checkbox"/>	8. Success Stories. Collect "success stories" from patients and display them.				□□□	□□□	
<input type="checkbox"/>	9. Certificates. Ensure Doctor's and CA's professional certificates are displayed.				□□□	□□□	
<input type="checkbox"/>	10. Upgrade the office area used by patients, such as move some furniture, posters, painted a wall, added a plant, etc. What specifically: _____ When: _____				□□□	□□□	
<input type="checkbox"/>	11. Doctor Resume. Display resume and picture of doctor in reception.				□□□	□□□	
<input type="checkbox"/>	12. "Stack a Day". Scheduled all maintenance patients with regular patients in on one day to increase awareness on increased capacity.				□□□	□□□	
<input type="checkbox"/>	13. Write in your own procedures here.				□□□	□□□	
<input type="checkbox"/>	14. Write in your own procedures here.				□□□	□□□	
<input type="checkbox"/>	15. Write in your own procedures here.				□□□	□□□	

5. PATIENT EDUCATION PROCEDURES		Assigned to: _____					
Select Activity to be performed:		Effectiveness of Project/Activity: 1 = Worked Well 2 = Worked OK 3 = Didn't work too well					
Recurring Activity	Scheduled Activity	Frequency of Use: 1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often					
<input checked="" type="checkbox"/> Review, assess, & select once every three months, or as needed.		Fill In ⇒					
		1	2	3	1	2	3
<input type="checkbox"/>	1. Staff Education. Doctor educated staff about chiropractic at least once per month.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2. Consultation. Every patient receives a thorough consultation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3. Report of Findings. Every patient receives a thorough and effective report of findings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4. Posters. Ensure that educational posters are displayed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5. Information. The doctor "Informs while he/she performs" with each patient on each visit. "Table talk" is educational.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	6. Re-Exam. Every patient receives a re-exam when appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	7. Re-Report. Every patient receives a re-report, and educated on maintenance care when appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	8. V.S.C. Ensure every patient thoroughly understands subluxation, V.S.C., misalignment, and other key clinical terms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9. V.S.C. Ensure every patient knows the consequences of a subluxation, V.S.C., misalignment, and other key clinical terms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	10. Video. Every patient receives a pre-consultation video.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	11. Video. Every patient receives a pre-report video.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	12. Report of Findings. Every patient receives a written report of findings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	13. New Patient Lecture. Every patient attends a new patient lecture held regularly each month.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	14. Pamphlets. The doctors and staff discuss chiropractic pamphlets with patients and hand them out.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	15. Pamphlets. Every patient receives a reading assignment from a pamphlet.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	16. Publicity. Scrapbook of new and good publicity about chiropractic, your doctor, etc., kept up. Items placed on bulletin board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	17. Case of the Week. Talk about "Case of the Week" to all your patients.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	18. Survey. Survey or test your patients to gauge the level of their understanding of chiropractic care (every 4-6 months).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	19. Chiropractic Library. Ensure library of chiropractic information for patients is used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To: Clinic Director From: _____

Date: _____

Marketing Manager System (www.pmaworks.com)

<input type="checkbox"/>	20. Educational Rewards. Provide patient with incentives to become more educated on chiropractic care.	□□□	□□□
<input type="checkbox"/>	21. Research. Provide research data for patients.	□□□	□□□
<input type="checkbox"/>	22. Video. Every patient to see a re-report or progress video when appropriate.	□□□	□□□
<input type="checkbox"/>	23. "What's New in Chiropractic" Keep a bulletin board in adjusting, therapy, or other rooms and post news articles on chiropractic.	□□□	□□□
<input type="checkbox"/>	24. Prompters. Use a white board in your adjusting room to write questions that your patients will be prompted to ask you.	□□□	□□□
<input type="checkbox"/>	25. Pamphlet Sequence. Give all new patients a series of educational pamphlets.	□□□	□□□
<input type="checkbox"/>	26. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	27. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	28. Write in your own procedures here.	□□□	□□□

6. REFERRAL PROCEDURES		Assigned to: _____							
Select Activity to be performed:		Effectiveness of Project/Activity: 1 = Worked Well 2 = Worked OK 3 = Didn't work too well							
Ongoing Activity	Scheduled Activity	Frequency of Use: 1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often							
<input checked="" type="checkbox"/> Review, assess, & select every three months, or as needed.		Fill In ⇒		1 2 3			1 2 3		
<input type="checkbox"/>	1. Reception. Ask "Who referred you" to all new patients.			□□□			□□□		
<input type="checkbox"/>	2. Coupons. Hand out Health Care Coupons to patients for their specific friends, with a specific schedule, and schedule them whenever possible.			□□□			□□□		
<input type="checkbox"/>	3. Referral Board. Keep an up to date list of patients that refer on a bulletin board. (With their approval in writing.)			□□□			□□□		
<input type="checkbox"/>	4. Asked for Referrals. Ask for referrals wherever possible, and schedule them when possible.			□□□			□□□		
<input type="checkbox"/>	5. Compliment patients that refer in new people.			□□□			□□□		
<input type="checkbox"/>	6. "Thank You's" . Thank patients personally for referring others.			□□□			□□□		
<input type="checkbox"/>	7. "Thank you" Cards. Send cards for referrals from patients, doctors, and other professionals.			□□□			□□□		
<input type="checkbox"/>	8. Specific Recommendations. Tell patients to bring in a <i>specific</i> friend/family member for a check-up, and schedule them for an appointment whenever possible.			□□□			□□□		
<input type="checkbox"/>	9. Spouse. Encourage patients to bring spouses to new patient class and report of findings, and schedule them whenever possible.			□□□			□□□		
<input type="checkbox"/>	10. Family Plans. Promote Family Plans and/or family policy to patients.			□□□			□□□		
<input type="checkbox"/>	11. Kids. Make sure toys for kids are available while parents are with doctor.			□□□			□□□		
<input type="checkbox"/>	12. Kids Board. Keep "Our Chiropractic Kids Photo Board" to date.			□□□			□□□		
<input type="checkbox"/>	13. Practice & Rehearsal. Practice scripts and dialogue for asking for referrals at least once every other month.			□□□			□□□		
<input type="checkbox"/>	14. Card Quota's. Set a target for a certain number of cards to hand out each week.			□□□			□□□		
<input type="checkbox"/>	15. Family History. Use a Family Health History form.			□□□			□□□		
<input type="checkbox"/>	16. Outside Referrals. Refer your patients to the services of your other patients wherever appropriate.			□□□			□□□		
<input type="checkbox"/>	17. Non-Patients in the Office. Educate non-patients whenever they are in the reception room, and schedule them for a complimentary consultation and/or exam.			□□□			□□□		
<input type="checkbox"/>	18. Referral Dinner. Schedule a dinner for patients and their friends and give a free lecture. Make appointments.			□□□			□□□		
<input type="checkbox"/>	19. Frequent Referral Program. Hold a "Care to Share" monthly referral program for your patients.			□□□			□□□		

To: Clinic Director From: _____

Date: _____

Marketing Manager System (www.pmaworks.com)

<input checked="" type="checkbox"/>	20. Other Referral Program. Utilize some type of "Frequent Referral Program".	□□□	□□□
<input checked="" type="checkbox"/>	21. Give talks or interviews to patient's friends, family, business, association, or other people connected to patient.	□□□	□□□
<input type="checkbox"/>	22. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	23. Write in your own procedures here.	□□□	□□□
<input type="checkbox"/>	24. Write in your own procedures here.	□□□	□□□

7. RETENTION, REACTIVATION & RECALL		Assigned to: _____							
Select Activity to be performed:		<i>Effectiveness of Project/Activity: 1 = Worked Well 2 = Worked OK 3 = Didn't work too well</i>							
Ongoing Activity	Scheduled Activity	<i>Frequency of Use: 1 = Used Often, 2 = Used about 1/2 the time, 3 = Didn't use too often</i>							
<input checked="" type="checkbox"/> Review, assess, & select once every three months, or as needed.		Fill In →		1 2 3			1 2 3		
<input type="checkbox"/>	1. Recall System. Maintain an effective recall system, and make it work.			□□□			□□□		
<input type="checkbox"/>	2. ROF. Every patient receives a complete and excellent report of findings discussing non symptomatic care.			□□□			□□□		
<input type="checkbox"/>	3. Multiple Schedule. Schedule multiple-appointments with each new patient.			□□□			□□□		
<input type="checkbox"/>	4. M. A. Card. Utilize a multiple appointment card with each new patient.			□□□			□□□		
<input type="checkbox"/>	5. Financial Consultation. Every patient receives a complete and excellent financial consultation after their report of findings.			□□□			□□□		
<input type="checkbox"/>	6. Re-Exam. Every patient receives progress exams throughout their treatment program when appropriate.			□□□			□□□		
<input type="checkbox"/>	7. Comparative Analysis. Use of SEMG, or some other diagnostic testing to show patients their progress.			□□□			□□□		
<input type="checkbox"/>	8. Follow-up Financial Consultations. Every patient received follow-up financial consultations updating them on their account, and moving them over onto a cash basis or wellness program when completed with regular care.			□□□			□□□		
<input type="checkbox"/>	9. Re-issue M.A. card. Issue a new multiple appointment card on each patient when the old one is used.			□□□			□□□		
<input type="checkbox"/>	10. Reactivation. Send a reactivation letter to all inactive patients three months after their last visit.			□□□			□□□		
<input type="checkbox"/>	11. Maintenance. Every patient that completes the Structural Correction phase of their care is scheduled for maintenance care.			□□□			□□□		
<input type="checkbox"/>	12. Wellness. Active Maintenance Program (wellness care) in place, including a special financial program.			□□□			□□□		
<input type="checkbox"/>	13. Dropouts. Contact each patient dropout, and reason for dropping out found and reported to Clinic Director.			□□□			□□□		
<input type="checkbox"/>	14. Newsletter. Mail out a patient newsletter.			□□□			□□□		
<input type="checkbox"/>	15. Re-Report. Every patient receives a re-report, and educated on maintenance care when appropriate.			□□□			□□□		
<input type="checkbox"/>	16. Survey. Use quality care and patient service surveys with all patients and use the results to improve clinic services.			□□□			□□□		
<input type="checkbox"/>	17. Involvement. Involve patients in clinic activities, such as advisory boards, focus groups, external promotions or community activities, such as listening to our radio programs, helping at lectures, screenings, donations, goodwill activities, etc.			□□□			□□□		
<input type="checkbox"/>	18. Reactivation Program. See Marketing Checklist #8, Special Promotions. Also, in the Marketing Tool Kit under Special Promotions.			□□□			□□□		
<input type="checkbox"/>	19. Write in your own procedures here.			□□□			□□□		
<input type="checkbox"/>	20. Write in your own procedures here.			□□□			□□□		