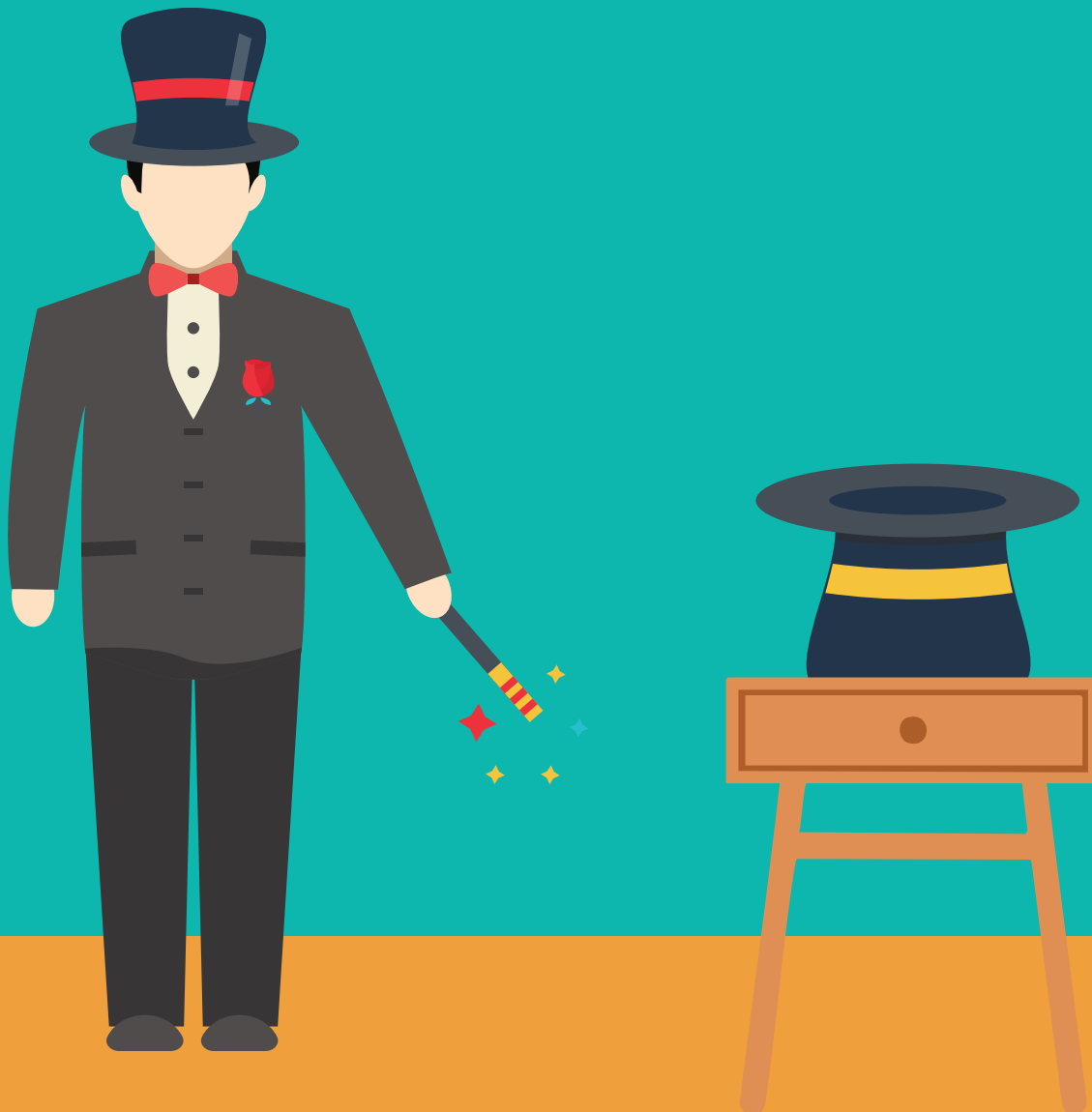


Vision HQ

A FIELD GUIDE TO
**MARKETING YOUR
VISION PRACTICE**

**10 ACTIONABLE TACTICS FOR
REACTIVATION AND ACQUISITION**



MARKETING IS IMPORTANT

There are a lot of practices not doing a lot of marketing. Most practices completely stopped their marketing during the COVID shutdown, and only somewhat started it back up once they reopened. Then everyone got super-busy from the pent-up demand, and most practices didn't feel the need to boost their marketing any more. This is good for you.

By zagging when everyone else zigs – **by ramping UP your marketing when everyone else has it turned down** – you can stand out more easily. Your marketing efforts will be more effective when you're the only postcard or the only coupon or the only email or the only social media ad. In some cases, you may even be able to negotiate better ad rates due to less demand.

This is a mindset. Whether you're pushing for new patients or reactivating existing ones – this document discusses both – ramp up your marketing with the following strategies and tactics and see results.

STRATEGY: FIND YOUR AUDIENCE

It all starts with a question: "Who are my patients?" If your first instinct is to answer "everyone with eyes!" then reframe the question: "who are my *ideal* patients?" Think about the types of patients whom you would want to see all day, every day, and figure out their demographic breakdown – maybe you find you love working with first-generation immigrants, or retirees, or young professionals, or moms. Once you've determined your ideal audience, dedicate the majority of your marketing efforts towards them.

If you're new to this idea, your natural instinct will be to think "why should I target a specific group of patients – I don't want to limit myself." That's perfectly normal. It's wrong, but it's normal. The truth is, specific is always better than general.

When you target your ideal patients, you will reach a higher percentage of those patients – which is great for you, since those are your ideal patients. Just as important, though, you'll become more memorable to everyone else. People will associate you with something, so you will appear in their mental search results *even when they're not in your ideal patient demographic*. They will still think of you.

Moral of the story: determining your audience can be the difference between a successful campaign and just shouting into the void, so find your audience, and market to them.

STRATEGY: FIND YOUR FOCUS

This is very much related to finding your audience above. All too often, as business owners we want to be all things to all people. We worry so much about losing potential customers that we don't work to gain customers. Have you ever seen a handyman or plumber with "we specialize in everything!" on the truck? Yeah, that grabs nobody. No one looks at that and says "Ooh! I need...everything..."

Same with your practice. "Family optometry with a focus on adults, children, and eyewear" means you don't have a focus. It might check all your boxes, but it won't get you patients. As contradictory as it seems, pick ONE thing, and focus on that. If your office has the latest awesome technology, push that hard. If you put an emphasis on patient comfort, lean into that. Be KNOWN for something. Just like with the audience focus, having a practice focus helps you stand out, and your wake will pick up plenty more.

CHART YOUR COURSE

After you've done the preliminary work of defining your ideal audience and finding your focus, it's time to put thoughts into action, your launch strategy, if you will.

Here are 10 actionable tactics you can use to market your practice better, both for reactivation and new patient acquisition. They've been proven through actual vision practice experience and run the gamut of required technical expertise. Should you use all of them? Sure you should, but you don't have to. Start at the beginning (the first, second, and third tactics are helpful to start with) and make your way through the rest. See what works for you.

HAVE A (MEMBERSHIP) PLAN

Implementing an in-house membership plan is a great first tactical step to reactivation and acquisition. With more and more patients losing or refusing vision insurance, it's becoming more and more important to create an efficient process to provide care for your uninsured patients. Whether you administer your own plan or use a third-party platform like VisionHQ, the important thing is that you Have a Plan.

1

TAKE YOUR SCHEDULING ONLINE

If you use these marketing strategies successfully, you'll (hopefully) have a large number of patients trying to schedule appointments. Using **online appointment scheduling software** will allow you to handle this new demand without overwhelming your front desk team. And if it integrates directly with your patient management system? Even better.

2

CREATE THE HOOK

You've set up your membership plan to better care for your uninsured patients, and you've got your online appointment scheduling system all set to handle the new demand...now let's **create the hook**.

Use a Comeback Special (name it however you want) to entice past-due patients to come back in to see you - maybe an eyewear credit if patients come in for an exam during a light month. We like credits for a few reasons: 1) the patient will likely spend more than the credit when they use it; 2) the credit helps with case acceptance for the future work; 3) it acts as a hook to get them back in later - so it's actually two hooks in one!

Maybe you don't like treatment credits and would prefer a percentage off - that works, too. The important thing here is that you have your hook, because you're going to use it in the upcoming steps.

3

SNAIL-MAIL PAST-DUE PATIENTS

Your past-due patients are the low-hanging fruit. They already know you, and hopefully already love you - they just might need **a little nudge to bring them back** to see you. Hitting them in their mailbox - their real mailbox, not their email inbox - might just do the trick. We recommend starting with a letter explaining your Comeback Special, your membership plan, or both. Follow that up a month later with a postcard with similar messaging, and then again a month after that. Keep it consistent, be persistent.

4

USE RINGLESS VOICEMAIL

We generally don't think of voicemail as high-tech, but this is pretty cool. Using a service like Stratics Networks, you can **record a message and insert it into your patients' voicemail boxes**. No conversation needed. Use it to get past-due patients back - it's more efficient than phone calls, and more personal than emails or texts.

5

CUSTOMIZE A FACEBOOK AUDIENCE

This gets a bit technical - it's not hard, but it's a multi-step process that's probably unfamiliar to most. The next page has all the How-To, but the upshot is this: you can create a **Facebook ad specifically for your existing patients** and have it display only in their feeds. How's that for targeting?

Facebook details on next page >

6

EMAIL & TEXT PAST-DUE PATIENTS

As ubiquitous as they are, let's not forget about emails & texts. **Send once-a-month messages** with a link to your online appointment scheduling software and watch the reactivations stream in. The text sends, especially, are much easier with a software solution.

7

WORK THE PHONES

Some patients prefer the personal touch of a live phone call from an actual person. Create phone lists of your past-due patients - no more than 10 people per list, to make it less daunting - and **assign those reactivation lists to your team members**. Make sure they mention your Comeback Special and ask if their insurance situation has changed. If they no longer have insurance (or if they didn't have it in the first place), then make sure they talk about your membership plan.

8

Consistency matters.

Effective marketing campaigns send the same consistent message through different sources and methods to meet the audience where they are. The tactics in this document run the gamut from direct mail to targeted Facebook ads, and depending on your practice demographics, some tactics will show better results than others. The important thing here is to **maintain message consistency** - whether you're reactivating or acquiring, your campaign needs to be a focused effort. Stay on target.

CONTACT PATIENTS 1X PER YEAR

Improve your patient relationships by encouraging them to come in once a year, instead of every 18-24 months. If they're covered for once a year, they should use their benefits and come see you! Think about contacting each patient once a year, using the method that has the most impact for your office. And remind them, they're already paying for the benefits, they should use them!

9

CONNECT WITH YOUR COMMUNITY

Wouldn't it be great to be able to market your practice to entire groups of potential patients at once? We thought so too, so we developed CommunityCONNECT™. Create a group, offer them a discount, and invite them. Super-simple, but super-powerful. Think retirement communities, church organizations, sports clubs...10x your marketing efforts with hardly any effort.

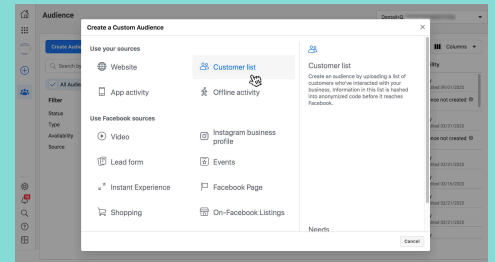
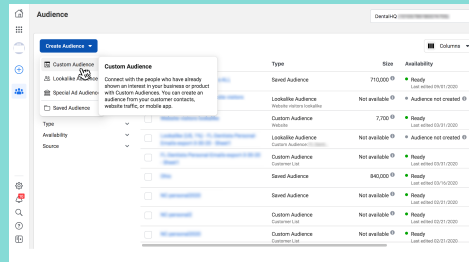
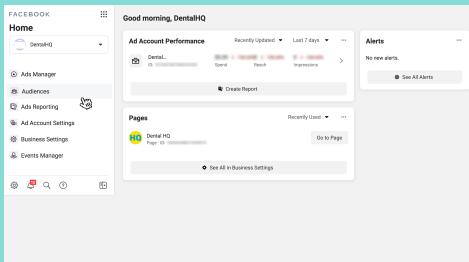
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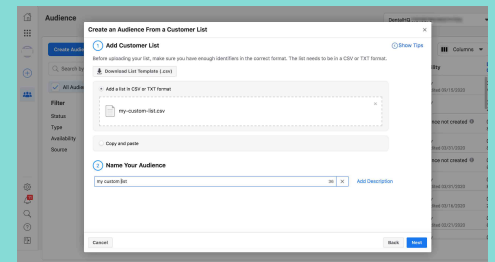
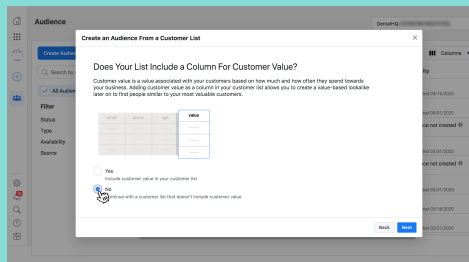
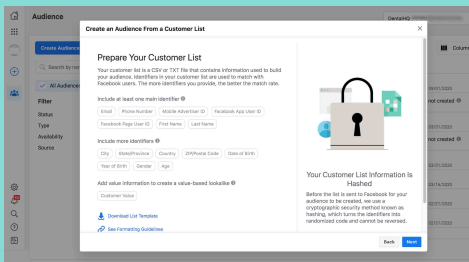
HOW TO ADVERTISE DIRECTLY TO YOUR PATIENTS ON FACEBOOK

This how-to assumes that you have a Business Page for your practice already. If you don't, there are plenty of resources online to show you how to do that. After you follow these steps, you will be able to create ads that only appear in your patients' Facebook feeds. Pretty slick.

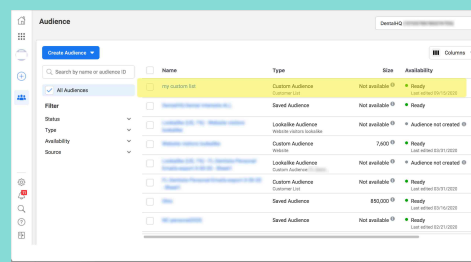
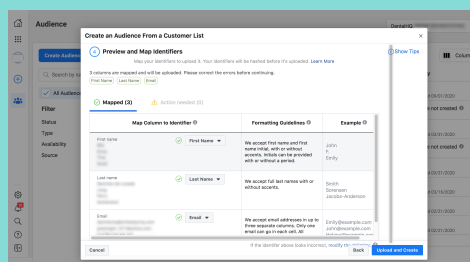
- 1 Go to **business.facebook.com** and click *Audiences* on the left
- 2 From the Audiences page, click *Create Audience* and then *Custom Audience*
- 3 Select *Customer list*



- 4 Prepare your patient list. Save a CSV file from your PMS with first name, last name, email, and phone#. When ready, click *Next*.
- 5 You probably don't have a Value field, so click *No* and then *Next*
- 6 Upload your CSV file, and give it a descriptive name. Click *Next*.



- 7 Make sure the fields in your CSV match up with what Facebook thinks they are. Click *Upload and Create*.
- 8 Your new Custom Audience should appear in your Audience list, and you're ready to target them!





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