Putting Together an Effective Marketing Plan Template
INTRODUCTION TO A MARKETING PLAN
A marketing plan is a roadmap that outlines how your practice marketing goals will be achieved. It usually covers a period of one year.

Developing a marketing plan will help you:
• Capture top level thinking and stimulate reflection
• Identify, allocate and manage your resources better
• Stay on track throughout the year
• Bring your marketing goals and strategy to life
• Optimize your marketing efforts and spend

A research study that was conducted among nearly 3,000 people, has shown that writing a business plan correlated with increased success in every one of the business goals included in the study.* This was found to be true for every company included in the study regardless of the type of the company, their growth stage or the intent for the business plan.

A marketing plan is an integral part of a business plan.

*Source: http://smallbiztrends.com

Key Contents of a Marketing Plan
Executive Summary
Situational & Patient Analysis
Marketing Strategy & Tactics
Implementation
Financials & Evaluation
Conclusion
Executive Summary

Marketing Plan At-a-Glance
The Executive Summary is an overview of the major points in your marketing plan.

You will introduce here:
• Your practice
• Your current situation
• How you are going to achieve your marketing goals and objectives

The Executive Summary is written after you have finalized all the other sections.

You are writing the Executive Summary for
• Any practice members who are partaking in this initiative but who do not have time to read the entire plan

What to include:
• Your practice summary
  • Years in business
  • Vision
  • Mission statement
  • Main services offered
  • Patients
  • Annual revenue
  • Management / Key practice staff members
• Problem or Opportunity
• Marketing goal and marketing objectives
• Marketing strategy and tactics that will enable you to achieve your goal
  • Why this strategy?
  • Why now?
  • E.g. Invisalign® treatment is becoming increasingly popular among patients
  • What specific actions?
• Marketing budget
• Forecast
  • What is your Invisalign case starts estimate and revenue forecast?
• Evaluation
  • What metrics do you have in place to determine whether you’ve been successful?

TIPS
• No more than one page
• Concise, easy to read
• Layman terms / no jargon
• Emphasize key points with bold type, bullets
• Write the Executive Summary last
Situational & Patient Analysis

An Overview of Your Internal and External Environment
This section is a summary of your inward and outward analysis:
- Inward analysis:
  - Practice Summary
  - Patient Analysis
- Outward analysis:
  - Market Summary
  - Competition Overview

This analysis will help you discover:
- Your unique practice identity, and the internal and external factors that are affecting your practice.

The outcome of this analysis will help you identify your marketing goals, your USP (Unique Selling Proposition) and your target patients.

**INWARD ANALYSIS: PRACTICE SUMMARY**

When analyzing your practice, think of it as if it were a person. This will enable you to discover its unique identity.

With this in mind, identify your practice’s strengths, weaknesses, and practice goals.

Include here:
- Years since founding
- Your unique practice identity
- **Core values**
  - What are your and your practice staff core values?
    - E.g. Integrity
  - Which one of these values are reflected in the way you are providing service and / or communicating with your patients?
  - What are the values you live by and your practice is guided by?
- **Brand / personality**
  - If your practice were a person what would its personality be?
    - E.g. Flexible, friendly or fun
  - How would you like your practice to be perceived by your patients?

**TIPS**

You can find out this information by:
- Talking to your practice team members
- Documenting your patients’ complaints / positive feedback
- Conducting patient surveys
- Analyzing your financial data and / or marketing reports
- Doing an online research
INWARD ANALYSIS: PATIENTS

The patient analysis will enable you to identify your distinct, major groups of patients and create their patient profile based on shared characteristics. You will use this information to tailor your services, marketing messages and marketing communication channels to your target patients.

To create your patient profile, find the answers to these questions:

Revenue potential
• How many patients do you have?
• Is this number increasing or decreasing Year Over Year?
• If decreasing or increasing, why is that?
• What group of patients bring you the highest revenues?

Characteristics of people who are valuing your practice services
• Demographic characteristics:
  • Age
  • Gender
  • Education
  • Marital Status
  • HHI (Household Income)
  • Family Size
  • Occupation
  • Etc.
• Psychographic characteristics:
  • Interests
  • Attitudes
  • Aspirations
  • Lifestyle
• Behavioral characteristics:
  • Are patients more likely to start orthodontic treatment in certain situations e.g. they’re getting married?
  • What are the communication channels they use to stay informed?
  • Do they mainly use online sources to research about orthodontic treatment?

Price sensitivity:
• How likely are they to buy an expensive treatment?

Service offering preference:
• What type of orthodontic treatment do they prefer?

TIPS

You can find out this information by:
• Documenting information about your patients
• Analyzing your existing patient data
• Conducting patient surveys
• Talking to your practice staff who interacts on a daily basis with your patients
• Online sources
• Talking to your Invisalign® Territory Manager

OUTWARD ANALYSIS: MARKET SUMMARY

A market analysis will help you discover the key trends and create the profile of your potential patients in the dental / orthodontic market.

Knowing your potential patients’ profile will help you create more effective marketing messages and reach your potential patients easier by using the communication channels they are using.

Market trends
• What are the main shifts in the market?
• Where is the market heading to?
Market growth
• Has the dental / orthodontic market increased or decreased?
• At smaller scale / locally
  • Has the # of HH (households) increased or decreased?
  • Are certain treatments on the rise / decline for all doctors in your community?
• What is driving the growth / decrease?

Potential patients (patients you don’t currently have)

Revenue potential
• Do any of these groups of patients grow faster than others?
• Do any of these groups of patients have a significantly higher income than others?

Patient profile
• Age range, gender, income range, education, occupation
• Lifestyle, interests, attitudes
• Decision making process, communication channels they use
  • E.g. Do they do most of their research about orthodontic treatment online or do they mainly rely on recommendations from friends?

Treatment drivers
• What are your potential patients’ needs and wants?

Price sensitivity
• How likely are they to buy an expensive orthodontic treatment?

Treatment barriers
• Reason why they don’t accept certain treatments

Service offering preference
• What type of orthodontic treatment would they prefer?

OUTWARD ANALYSIS: COMPETITION OVERVIEW

The competition analysis will help you establish what makes you unique in the market and what attributes you need to highlight to attract your main patients.

When analyzing your key competitors, consider the following:
• Their position in the market
• Their USP (Unique Selling Proposition)
• The main services they offer
• Their strengths and weaknesses
• Their marketing goals
• Their objectives
• Their strategy and tactics

TIPS

You can find out this information by:
• Talking to your customers
• Asking your Invisalign Territory Manager
• Reading local newspapers, doing a research online e.g. Invisalign Doc Locator
• Personal observations

TIPS
• Use free / paid reports and market publications e.g. ibisworld.com, micromarketmonitor.com, dentistryiq.com
• Reference specialty articles / blogs or websites e.g. dentaleconomics.com, ada.org
• Ask your Invisalign Territory Manager
### SWOT Analysis

After you have done your internal and external practice analysis, show your most important takeaways in a S.W.O.T. matrix. S.W.O.T. stands for Strengths, Weaknesses, Opportunities and Threats.

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<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>• What does your practice do well?</td>
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<td>• What makes you better than your competitors?</td>
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<td>• What do your patients / practice staff say positively about your practice?</td>
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<td>• What other internal factors work in your favor?</td>
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<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
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<tr>
<td>• What external changes could have a positive impact on your practice?</td>
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<td>• E.g. An increasing number of patients prefer clear aligners</td>
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<td>• Can you take advantage of the changes in your local market?</td>
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<td>• E.g. The number of HH (households) in your community is growing</td>
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<td>• What are the other external factors that would be favorable to your practice?</td>
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<thead>
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<th>Weaknesses</th>
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<tr>
<td>• What are your areas of improvement?</td>
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<td>• What are your competitors’ advantages?</td>
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<td>• E.g. A higher advertising budget?</td>
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<td>• What do patients / practice staff say your competitors are doing better?</td>
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<tr>
<td>• What other internal factors are hindering your practice?</td>
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<table>
<thead>
<tr>
<th>Threats</th>
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<td>• What are the external changes at macro level that could affect your practice negatively?</td>
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<tr>
<td>• What are the less positive aspects in your local market that could affect your practice?</td>
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<tr>
<td>• What other external factors would hinder your practice?</td>
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</tbody>
</table>
Marketing Strategy & Tactics

The Choices That Bring Your Marketing Plan to Life
Marketing Strategy

The marketing strategy is the “what” in your marketing plan – what you are going to do to achieve your marketing goals. It helps you identify ways in which you can reach your target patients.

There are two main types of marketing strategies you can choose from:
• Strategies that are geared towards your existing patients
• Strategies that are geared towards new patients

The best strategy for your practice is the one that:
• Has the highest impact on your practice
• Is actionable and timely – can be implemented in the foreseeable future
• Is consistent with your practice identity
• Is aligned with your practice resources – human, capital, and technical
• Will bring you a positive ROI

Your marketing strategy is:
• Tailored to your target patients
  (best current patients and / or best potential patients)
• Consistent with your practice USP
  (Unique Selling Proposition)
• Informed by your marketing goals and objectives

1. Target Patients
Your target patients are your best patients:
• The patients who value / are most interested in your services
• Have the greatest revenue potential

Refer to the work you have done in the previous section. You have identified your target patients in your inward and outward analysis of your Marketing Plan.

2. Unique Selling Proposition (USP)
The USP is your key differentiator, what makes your practice stand out:
• Your competitive advantage
• What is the reason for which your practice is superior to your competitors?
• The key benefit to your patients
• What is your philosophy towards the patient, what is that you want him / her to think of your practice?
• What do your patients value in your practice the most?

Your USP is a memorable statement that is consistent with your unique practice identity (core values, brand / personality, vision, mission statement).

You can use this framework to create your USP:
For .......... (target patients) who .......... (target patients’ need / opportunity) our practice is a .......... (type of dental practice) that .......... (statement of benefit).
3. Marketing Goals and Objectives

Your marketing goals stem from your business goals and they are shaped by the outcome of your S.W.O.T. analysis.

For example:

- **Business goal**
  - I want to increase my revenues by 10% by the end of year.

- **Opportunities**
  - Invisalign® clear aligners become more and more popular among patients. Patients are more health-oriented nowadays.
    - E.g. males 25+ years old

- **Strengths**
  - I am an Invisalign trained provider and I can meet my target patients’ needs.

- **Marketing goal**
  - To achieve my business goal, I aim to increase the number of Invisalign patients for my practice.

To increase the likelihood of meeting your marketing goal, make sure it is clearly defined. Establish the marketing objectives that will help you define how you are going to meet your marketing goals using the S.M.A.R.T. framework.

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<th>Specific</th>
<th>Measurable</th>
<th>Attainable</th>
<th>Relevant</th>
<th>Time-bound</th>
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</thead>
<tbody>
<tr>
<td>Describe exactly what needs to be done</td>
<td>Ensure that success or progress can be measured</td>
<td>Set your objective so that it can be attained by those responsible for achieving it (important for motivation)</td>
<td>Make sure that reaching your objective is relevant to your goal</td>
<td>Set timelines and milestones for when results will be achieved</td>
</tr>
</tbody>
</table>

**Example**

S.M.A.R.T. Objective: I want to have 39 new Invisalign case starts by the end of year.

Non-SMART Objective: I want more Invisalign case starts for my practice.

We recommend you establish your goals and objectives in collaboration with your Invisalign Territory Manager.

**Marketing Tactics**

Building a marketing plan is about making choices. In making these choices, some of the things you should consider are:

- How big are your growth goals?
- How much are you willing to invest in marketing?
- What is your practice’s attitude and philosophy towards marketing?

The marketing tactics that you will implement need to be aligned with your marketing strategy.

**Key steps to consider when developing your marketing tactics:**

- **Key messaging**
  - What message are you going to highlight in your marketing materials? Keep in mind your USP.
- **Communication channels**
  - Where are your patients consuming information?
  - What are the best communication channels to reach your audience?
- **Learn from your competition**
  - How do your competitors promote themselves?
  - What can you learn from them?
  - How are you going to differentiate yourself?
Whatever your choices may be, before developing any new marketing tactics, make sure you have first covered the beginning level marketing activities. Top Invisalign® practices have used these as a foundation for their marketing plans. Many of these items can be found at the Invisalign Marketing Site at little or no cost.

**Marketing tactics ideas geared towards your existing patients**

In your practice, display the following Invisalign brand materials:
- Consumer brochure
- Straight Talk brochure
- Poster
- TV spot and / or Videos on the monitor in your lobby
- Window cling
- Appointment reminders
- Customized materials featuring your own Invisalign patients
  - E.g. Casebook

In addition, you can organize Invisalign Day events (ask your Territory Manager for details).

To reach your patients outside of your practice, promote Invisalign treatment:
- On your website
- On your social media pages
- In newsletters (if any)
- In your email reminders to patients
  - E.g. Customize one of the Invisalign flyers and attach it to your email or include a generic ClinCheck® video

**Marketing tactics ideas geared towards new patients**

To reach out to new patients outside of your practice, promote Invisalign treatment:
- On your website
  - Add the YouTube Invisalign channel link to your website and / or customize the last end-frame of the Invisalign brand TV spot and post it to your website
- On your social media pages
  - E.g. Post your own patient testimonial videos
- In online directory listings
- In online paid ads
- In local radio ads
- In brochures that you could place in public places
  - E.g. Health spas, gyms, beauty salons, community centers
- In direct mail materials
- In flyers that you can hand out to offices in your area

In addition, you can leverage your existing patients and / or network to put in motion a patient referral program. Start by creating advocates out of your existing Invisalign treatment patients and leverage your relationship with Health professionals outside of your practice.
Implementation

Making Your Marketing Plan a Reality
This is the heart of your marketing plan and what brings your marketing strategy to life. In this section you will detail the execution of your marketing tactics.

When kicking-off the implementation of your tactics, you will need to identify the following:

• Resources needed – practice members with marketing responsibilities
• Key milestones for your marketing tactics. It’s important to achieve all your milestones on time and on budget.

We recommend you use the templates below to increase the effectiveness of your implementation efforts.

### Marketing Activities Calendar Example

The Marketing Tactics Calendar will give you an overview of all your marketing activities. This will help you plan better, stay organized and also, it will help you and your team commit to your deadlines. This type of template will also help you identify your busy months so that you can allocate the necessary resources ahead of time.

To customize this template with your own marketing tactics, list all the marketing activities that you’re planning in a given year along with the month in which they are scheduled.

<table>
<thead>
<tr>
<th>Marketing deliverable/tactic</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
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<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Responsibility</th>
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<td>Direct mail</td>
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<td>Receptionist</td>
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<td>Invisalign® Day Events</td>
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<td>Office Manager</td>
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<td>Invisalign Ads on social media (specify channel)</td>
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<td>Practice Google Ads (specify name of the ad)</td>
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<td>Practice website promos</td>
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<td>Referral campaign e-mails</td>
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<td>Receptionist</td>
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</table>

Please note:
This is just an example. Work with your Marketing person / the practice member responsible for marketing in your practice to create a customized Marketing Activities Calendar.
**Project Tracker Example**
This template is useful when you are looking at each tactic at a time. Start by breaking down each activity or tactic in smaller parts which in the Invisalign Day example would be – setting up a date for your event, creating a flyer, emailing your current patients etc. Next, work your schedule backwards and estimate how much time each one of these tasks would take so that you don’t miss any of your deadlines. The last step is to identify the practice members who will undertake various tasks. To ensure a flawless execution, our recommendation is to have no more than two people assigned to each activity.

**Project Name: Invisalign Day Event**

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsibility</th>
<th>Mon 1/1/16</th>
<th>Tue 1/2/16</th>
<th>Wed 1/3/16</th>
<th>Thur 1/4/16</th>
<th>Fri 1/5/16</th>
<th>Mon 1/8/16</th>
<th>Tue 1/9/16</th>
<th>Wed 1/10/16</th>
<th>Thur 1/11/16</th>
<th>Fri 1/12/16</th>
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<tbody>
<tr>
<td>Set up date with the Invisalign Territory Manager</td>
<td>Receptionist</td>
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<td>Create Flyer</td>
<td>Office Manager</td>
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<tr>
<td>Flyer approval</td>
<td>Doctor</td>
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<td>Content for e-blast due</td>
<td>Office Manager</td>
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<td>Send email to prospective patients</td>
<td>Receptionist</td>
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<td>Role play in preparation for the event</td>
<td>All practice staff</td>
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<td>Order flowers and other supplies (be specific)</td>
<td>Receptionist</td>
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<tr>
<td>Invisalign Day Event - Meet &amp; Greet</td>
<td>All practice staff</td>
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<td><strong>After the event</strong></td>
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<td>Send follow up emails</td>
<td>Receptionist</td>
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<td>Post mortem meeting - what worked/what didn’t</td>
<td>All practice staff</td>
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Please note:
This a fictitious example, talk to your Invisalign Territory Manager to find out what are the tasks and milestones for organizing an Invisalign Day Event.
Financials

This section offers a financial overview as it relates to your marketing goals, objectives and tactics. You will show here your strategy’s immediate, and expected long-term results. This information will help you track your progress vs your goal and it will bring credibility to your marketing plan.

What to include:

**Invisalign® cases forecast**

- How many cases do you need to have each month / quarter to meet your yearly objective?

For a realistic monthly and quarterly forecast, consider the following:

- How many Invisalign cases did you get in the same period last year?

- If you are doing the same tactics as last year but are increasing their volume and / or frequency, estimate the additional # of cases these tactics will bring you.

- If you are employing different tactics this year – what is your estimated incremental volume from these new tactics in the period when they are scheduled?

- Guesstimate based on historical numbers for similar tactics and / or industry standards (do on online research)

- Write down the assumptions you make when forecasting to be able to confirm / infirm later

**Revenue projections**

- Value ($) associated with your Invisalign cases

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**Example: Invisalign Cases Forecast template**

**Case Starts Forecast – Units**

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<td>Invisalign Cases</td>
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<td>(Total Invisalign Cases Current Year - Total Invisalign Cases Previous Year)/ Total Invisalign Cases Previous Year</td>
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**Case Starts Forecast – Revenue (Revenue = Unit Price * # Units)**

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<td>Invisalign Cases Reveneue</td>
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<td></td>
<td>(Total Invisalign Revenue Current Year - Total Invisalign Revenue Previous Year)/ Total Invisalign Revenue Previous Year</td>
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When done, you can use the Charts option in Excel to improve the visualization of your sales forecast.
Marketing budget

- Estimate your marketing spend
- How much will all your marketing activities cost?
- Alternatively, if you are doing the same activities as last year, you can derive your budget by multiplying the number of treatments you would like to get in the current year with the marketing investment per treatment from last year.
- Use the formula and guidelines provided below to help you determine the budget that will help you achieve your practice’s Invisalign® goals.

Marketing Budget Calculations Example

If your practice treated 6 patients last year and spent $3,000 in marketing and your goal is to treat an additional 6 patients this year (for a total of 12 treatments) you would calculate this year’s annual budget as follows:

<table>
<thead>
<tr>
<th>New Treatments</th>
<th>Marketing Investment per Treatment</th>
<th>Budget to Achieve Growth</th>
<th>Last Year’s Budget</th>
<th>Annual Budget</th>
<th>Quarterly Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>$500</td>
<td>$3,000</td>
<td>$3,000</td>
<td>$6,000</td>
<td>$1,500</td>
</tr>
</tbody>
</table>
### Evaluation

Monitoring and evaluating your implementation efforts and their outcomes, will help your team stay focused and it will allow you to modify or introduce new tactics that will help you achieve your goals.

### Conversion Rates

You can use this template as a starting point to track your conversion rates in a given year as well as YOY (Year Over Year):

<table>
<thead>
<tr>
<th>Month</th>
<th>No. Invisalign Inquiries (Phone/Email/Referral)</th>
<th>% Converted to Consultation = No. of Invisalign Consultations / No. Invisalign Inquiries</th>
<th>No. of Invisalign Consultations</th>
<th>% Converted to Treatment = Total No. of Invisalign Case Starts / No. Invisalign Consultations</th>
<th>Total No. of Invisalign Case Starts</th>
<th>% of Cases Treated with Invisalign</th>
<th>Increase Current Year vs Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>13</td>
<td>54%</td>
<td>7</td>
<td>71%</td>
<td>5</td>
<td>71%</td>
<td>11%</td>
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<td>Jan 2016</td>
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<td>Feb 2016</td>
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<th>No. of Invisalign Consultations</th>
<th>% Converted to Treatment = Total No. of Invisalign Case Starts / No. Invisalign Consultations</th>
<th>Total No. of Invisalign Case Starts</th>
<th>% of Cases Treated with Invisalign</th>
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<tbody>
<tr>
<td>Example</td>
<td>10</td>
<td>50%</td>
<td>5</td>
<td>60%</td>
<td>3</td>
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<td>Jan 2015</td>
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</table>

* This is an example of a Referral Patient Tracker you can use to monitor your patient referrals:

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Date</th>
<th>Referral Source</th>
<th>Scheduled Appointment</th>
<th>Attend Appointment</th>
<th>Outcome</th>
<th>Comments</th>
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<tbody>
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Conclusion

Key Takeaways
A strong conclusion reinforces your commitment to go through with your marketing plan and is cementing the support you may need from other practice members who are partaking in this initiative.

In your Conclusion, you will summarize the key points of your marketing plan. You will:

• Reiterate your practice vision
• Restate your marketing goals and objectives
• Talk about the opportunity and state your marketing goal
• Explain why you are set up for success – strengths, uniqueness, marketing tactics you have planned, timing, and case starts projections
• Show your marketing spend