Census Growth

Developing and Executing a Strategic Marketing Plan

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Census Growth

Developing and Executing a Strategic Marketing Plan

Disclosure of Commercial Interests

Premier Coaching and Training, Inc. has had consulting contracts with the following organizations:

- Health Care Advisory Services, LLC
- Health Services Management Team, LLC
- Luther Place Management and Rehabilitation Center
- Miro Health Care
- NewMark Health Care Center
- Genesis Healthcare, LLC Program
- ProHealthCare Senior Living, FL
- Pomegranate Health Program
- Quail Valley Health Care
- The Anderson
- Liberty Health Care
- Liberty Senior Care
- Autumn Care
- Jupiter Senior Living
- Pine Trace, Upland
- The Barry, Upland
- Marquette Health System
- Meric Health System (AFI Program)
- The Anderson
- LVC Consulting
- Broadway Health System
- The Anderson

Introduction

Luke Fannon

Experience

- 25+ Years of Healthcare Sales and Marketing Experience
- 20+ Years of Increasing Referrals and Leads in Senior Care Industry
- 15+ Years of Senior Leadership Experience
- Started Independent Consulting Firm in 2005
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Results
- $500 Mil. in Revenue and 70 Communities: AL, SNF, CCRC
- Numerous Awards – President’s and Chairman’s Club
- Inc. Magazine’s 14th Fastest Growing Privately Held Co.
- Clients and employers alike have experience double and triple digit revenue and profitability growth.
- Our clients include Acute & Sub Acute Rehab, Outpatient Rehab/CORF’s, Home Care, Adult Day Health Care, Assisted Living, DME and Pharmaceutical

Group Discussion
What do you want to get out our time together?

Program Goal
- Create a Strategic Marketing Plan to Help You Grow Census!
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Program Objectives

- Process of Creating a Strategic Marketing Plan
  - What information do you need
  - Process
  - Identifying the right marketing strategies, tactics and targets based on your market
- Set Realistic Objectives for Referrals and Admissions Based on Census Targets
- ID Successful Strategies and Tactics
- Monitor Plan’s Execution and Track Progress

“If you fail to plan, you are planning to fail.”
Benjamin Franklin

What is a Marketing Plan?

Susan Ward in www.about.com:

“A marketing plan outlines the specific actions you intend to carry out to interest potential customers and clients in your product and/or service and persuade them to buy the product and/or services you offer.”
What ‘Actions’ Should We Choose?

<table>
<thead>
<tr>
<th>Product</th>
<th>Consumer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionals</td>
<td>Media</td>
</tr>
</tbody>
</table>

Who are your customers?

Who are your customers?

Where are your customers?
Planning to Create a Marketing Plan?

- Metrics from last 2 years (pref)/last quarter (min)
- List of all professional referral sources
- List of all sources of referrals (other than professionals)
- List of previously executed (past year) marketing strategies and tactics
- List of community and other organizations
- List of competitors, strengths & weaknesses
- List of your strengths & weaknesses

Process

- Analyze metrics and referral trends
- Create Goals and Objectives
- ID competitive position in the market place
- Review previous marketing strategies
- ID Strategies and Tactics
- Create Action Plan

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SNF
- Admissions
- Discharges
- Referrals
- Conversion Rate = Admissions/Referrals
- Decline
- Lost Leads
- Utilization – LOS

ALF
- Move Ins
- Move Outs
- Referrals
- Move Ins/Referrals
- Tours/Referrals
- Move Ins/Tours
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Process
- Analyze metrics and referral trends
Metrics are a critical management tool providing leadership the ability to:
- Objectively evaluate sales and marketing team and other team member performance.
- Identify opportunities to improve performance and increase census.
- Make strategic and tactical marketing decisions based on objective information presented.

Admissions/Discharge (Move in/Move Out) Differential
- Admissions > Discharges Census
- Admissions < Discharges Census
- Admissions = Discharges Census

Admissions are a Factor of Two Metrics
- Total Referrals Received x Conversion Ratio

Conversion Ratio
- Admission ÷ Referrals
- Decline Ratio = Declines/Referral
- Lost Lead Ratio = Lost Lead/Referral
- Acceptance Ratio = Admissions/Accepted Referrals

Utilization
- LOS - Length of Stay

Referral Metrics
- Referral Trends are an indicator of the success or failure of marketing plan strategies and tactics. What works & what doesn’t!
- Overall
- Trend of qualified referrals vs. unqualified referrals
  - A high percentage of unqualified leads suggests that you need to improve your communication to referral sources and change your messaging in advertising, public relations and special events.
- Trend of referral channels: Professionals, Advertising/PR and Special Events - 3 major channels of referrals.
- Trend of individual referral sources.
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**Process**
- Analyze metrics and referral trends

**Conversion Ratio**
- Overall effectiveness of your Process of Converting Referrals into Admissions
- Indicator of the effectiveness of the Skills your admissions sales and marketing teams employ during the process
- Potentially indicator of your Reputation
- Potentially an indicator of your ability to Meet the Needs of Your Customers

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**Process**
- Set goals and objectives (SNF)
  - Current Average Daily Census for Previous Quarter
  - Census Goals (either budgeted or other)
  - Average Admissions/Month Previous Quarter
  - Conversion Rate/Month Previous Quarter
  - LOS (SNF only)

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**Process**
- Set goals and objectives (ALF)
  - Current Average Daily Census for Previous Quarter
  - Census Goals (either budgeted or other)
  - Average Move-Ins/Month Previous Quarter
  - Average Move-Outs/Month Previous Quarter
  - Conversion Rate/Month Previous Quarter
  - Tour/Referral Rate Previous Quarter
  - Move-In/Tour Ratio
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Process

➢ Evaluate Competitive Position in Market
  ➢ Physical Plant and Location
  ➢ Programs and Services
  ➢ Reputation
  ➢ Feedback from Referral Sources (on your facility/competitors)
  ➢ Contracts
  ➢ 5-Star Rating
  ➢ Resident Satisfaction
  ➢ Pricing
  ➢ Marketing Tools

Qualitative Assessment

➢ Referral Process: Nursing and admissions and marketing team compared favorably with typical facilities in the market for their efforts on behalf of the case managers and their patients.
  ➢ Referral Process: Client did not compare favorably to typical facilities they worked with because they are frequently closed Monday through Friday for public holidays (MLK Day, Friday after Thanksgiving and others holidays) when all of their competitors are open.
  ➢ Bed availability declines were mentioned as an issue over the Christmas holidays that other competitors did not experience.
  ➢ Most competitors are going to 7-day per week admissions processes to meet their needs vs. Client’s policy is that weekend admissions must be set up by Friday.
  ➢ CO (a competitor) was specifically mentioned as more willing to accept clinically complex patients that client declines.

➢ Reputation is very good and case managers report few (if any) complaints from patients returning to hospital from facility
  ➢ Hospital referral sources report they would like to see client accept fresh trachs and dialysis patients
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Process

- Evaluate Competitive Position in Market
  
<table>
<thead>
<tr>
<th>Facility</th>
<th>Social Media</th>
<th>Email Marketing</th>
<th>Referral Networks</th>
<th>Overall Website</th>
<th>Social Media</th>
<th>Online Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>RC</td>
<td>4</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>GL</td>
<td>2</td>
<td>5</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>SH</td>
<td>1</td>
<td>6</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>EB</td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>PB</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

- Review Marketing Strategies and Tactics
  
  Referral Sources
  - Need Based
    - Quality Care for Patients
    - Customer Service
  - Education
  - In-services
  - CEUs
  - Distribution of Collateral Materials
  - New Programs and Services
  - Strategic
    - CEO Meeting
    - Department Head Meetings
    - Program Development
  - Personal
  - Networking Events
  - Open Houses
  - Thank you for Referrals

- Resource
  - Information and resources even if you don't benefit by receiving a specific referral/admission

- Thank you for Referrals
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Process

- Review Marketing Strategies and Tactics

<table>
<thead>
<tr>
<th>Referral Source</th>
<th>2 Year Ref Trend</th>
<th>Education Ops</th>
<th>Strategic Ops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital 1</td>
<td>+5%</td>
<td>In person</td>
<td>2</td>
</tr>
<tr>
<td>Hospital 2</td>
<td>–4%</td>
<td>In person</td>
<td>2</td>
</tr>
<tr>
<td>Referral Source 1</td>
<td>Referral Source 2</td>
<td>Work with Home Care</td>
<td>3</td>
</tr>
<tr>
<td>Home Care</td>
<td>+1%</td>
<td>In person</td>
<td>2</td>
</tr>
<tr>
<td>Hospice</td>
<td>+5%</td>
<td>In person</td>
<td>2</td>
</tr>
<tr>
<td>ALF</td>
<td>+5%</td>
<td>In person</td>
<td>2</td>
</tr>
</tbody>
</table>

ID New Referral Sources

- Client Honolulu, HI

- 5 Referring Hospitals
- 4 Admit/Year from Group Homes
- 13 Group Homes in Honolulu
- 5 admits/mo. from 'home'
- Where do they come from? No Idea!
- 16 ALF's
- No Relationship
- 17 Home Care Agencies
- 19 PCP's
- 1 Specializes in Respiratory Programs
- No Relationships

Media

- Print, Radio, TV, Direct Mail
- Organization Support
- Public Relations
- Website
- Facebook and other social Media
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Process

- Review Marketing Strategies and Tactics

<table>
<thead>
<tr>
<th>Media tactic</th>
<th>Deployed</th>
<th>Message</th>
<th>Referrals/Mer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>Yes</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Facebook</td>
<td>Yes</td>
<td>Memory</td>
<td>0</td>
</tr>
<tr>
<td>Radio</td>
<td>Yes</td>
<td>Care</td>
<td>3</td>
</tr>
<tr>
<td>Print</td>
<td>Yes</td>
<td>Nutrition, Medications</td>
<td>2</td>
</tr>
<tr>
<td>PR</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Consumer
  - On-Site Special Events
  - Off-Site Special Events
  - Health Fairs
  - Charitable Efforts
  - Professional Organizations Participation

- Event Attendance Referrals Secondary Impact

<table>
<thead>
<tr>
<th>Event</th>
<th>Attendance</th>
<th>Referrals</th>
<th>Secondary Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA Event @ Facility</td>
<td>300</td>
<td>0</td>
<td>Article in Paper at VA Residents</td>
</tr>
<tr>
<td>Pictures with Santa</td>
<td>50</td>
<td>0</td>
<td>Put on Facebook</td>
</tr>
<tr>
<td>BP Screen @ Sr. Ctr</td>
<td>50</td>
<td>2</td>
<td>Sr. Center Newsletter Referrals from KVU</td>
</tr>
<tr>
<td>Health Fairs</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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**What 'Actions' Should We Chose?**

<table>
<thead>
<tr>
<th>Product</th>
<th>Consumer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionals</td>
<td>Media</td>
</tr>
</tbody>
</table>

### Product
- Improve Services
- Add Services
- Improve Admissions Processes
- Pricing & Managed Care Contracts
- Criteria for Admission

### Community
- On Site Special Events
- Off Site Special Events
- Health Fairs
- Charitable Efforts
- Organization Participation

### Professionals
- Expand Existing Referral Sources
- Develop New Referral Sources
- Education
- Customer Service
- Strategic Relationships
- ACO & Bundled Payment Program Participation

### Media
- Website
- Social Media
- Advertising
- Public Relations

### Product/Improve Services
- Quality of Care (Best for Patients)
- Star Rating, Resident Satisfaction
- Cleanliness, Landscaping
- Paint and Interior Decorations
- Renovations

### Product/Add Services
- Year Units
- Memory Care Neighborhoods
- Outpatient Rehabilitation
- Advanced Respiratory Program
- Partnerships with Hospitals & Other Providers
- Palliative Care Program

### Product/Improve Processes
- Improve TAT
- Improve Criteria for Admission
- Reduce Information Requested
- Improve Communication
- Reduced Room Readiness TAT
- Improve Medical Paperwork Processes
- Change Application Processes

### Product/Pricing & Managed Care Contracts
- Add Managed Care Contracts
- Adjust Pricing
- Care Level and Medication
- Administration Pricing Adjustments
- Incentives
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### What 'Actions' Should We Choose?

#### Consumer/Need Based Events

**On-Site**
- VA Programs
- Parkinson’s
- Alzheimer’s Virtual Reality
- Orthopedic
- Cardiology

**Off-Site**
- Health Screenings
- Health Fairs

#### Consumer/Soft Events

**On-Site**
- Pictures with Santa
- Holiday Events
- Family Dinner
- Lunch on Us
- Veterans Day Event
- Charity Events

**Off-Site**
- Bingo @ Sr. Center
- Charity Events
- Chamber, Rotary

### 360° Relationship

#### Personal Relationship

- Thank You (200 Annually)
- Networking Events
- Open Houses
- Happy Hours
- Coffee on the Go
- Dinner on the Go

#### Need Based Relationship

- Assistance with challenges when you do not benefit
- Articles of Professional Interest
- Invitations to Networking Events

#### Strategic Relationship

- Medical/Financial/Marketing Relationship
- Meeting an Extraordinary Need/Program Development or Service Enhancement
- Allowing a Service to Business
- Practice
- Strategic Partnership
- School-Based Products Development
- ACO/Bundled Payment Participation
- Post-Acute Network Participation

#### Resource Relationship

- Medical/Financial/Marketing Relationship
- Meeting an Extraordinary Need/Program Development or Service Enhancement
- Allowing a Service to Business
- Practice
- Strategic Partnership
- School-Based Products Development
- ACO/Bundled Payment Participation
- Post-Acute Network Participation
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What ‘Actions’ Should We Chose?

<table>
<thead>
<tr>
<th>Media/Traditional</th>
<th>Media/PR</th>
</tr>
</thead>
<tbody>
<tr>
<td> Paid Source of Information for Consumers About Your Product</td>
<td></td>
</tr>
<tr>
<td> Print</td>
<td></td>
</tr>
<tr>
<td> TV</td>
<td></td>
</tr>
<tr>
<td> Street Mall</td>
<td></td>
</tr>
<tr>
<td> Support Special Events</td>
<td></td>
</tr>
<tr>
<td> Free Source of Information for Consumers About Your Product</td>
<td></td>
</tr>
<tr>
<td> Support Charitable Efforts</td>
<td></td>
</tr>
<tr>
<td> Promote</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Media/Website &amp; Social Media</th>
<th>Media/Marketing Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td> On‐line Source of Information for Consumers About Your Product</td>
<td></td>
</tr>
<tr>
<td> Develop Website</td>
<td></td>
</tr>
<tr>
<td> Create Content and Video for Website</td>
<td></td>
</tr>
<tr>
<td> Blog Monthly (website and Facebook)</td>
<td></td>
</tr>
<tr>
<td> Respond to Line Reviews</td>
<td></td>
</tr>
<tr>
<td> Encourage On‐line Reviews</td>
<td></td>
</tr>
<tr>
<td> Respond to Negative Reviews</td>
<td></td>
</tr>
<tr>
<td> Update Regularly</td>
<td></td>
</tr>
<tr>
<td> Main Brochure</td>
<td></td>
</tr>
<tr>
<td> Brochures for Specialty Programs (Memory Care)</td>
<td></td>
</tr>
<tr>
<td> Insurance Card List</td>
<td></td>
</tr>
<tr>
<td> Physician List</td>
<td></td>
</tr>
<tr>
<td> Room Layouts</td>
<td></td>
</tr>
<tr>
<td> Pricing Sheets</td>
<td></td>
</tr>
</tbody>
</table>

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Process

 Analyze metrics and referral trends
   Create Goals and Objectives
   ID competitive position in the market place
   Review previous marketing strategies
   ID Strategies and Tactics
   Create Action Plan

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Format of Strategic Marketing Plan

 Goal
   Objectives
   Strategies
   Tactics
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Marketing Plan Elements

> **Goal:** It's a number! A Measurable and specific milestone that defines ultimate top line success.
> **Objectives:** NUMBERS! Measurable and specific milestones that when met should get you to your goal(s). 3 to 5 Objectives in a plan!
> **Strategies:** Broad statements of activity that articulate the approach your organization will take to achieve its objectives.
> **Tactics:** Specific actions that when completed will result in you realizing your strategies and achieving your objectives:
  > **Time Frame for Completion:**
  > **Someone responsible for completing it (NOT THE TEAM)**

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**Strategies/SNF Case Study**

1. Increase Referrals from Existing Hospital Referral Sources through Education About RCC's Competitive Advantages.
2. Increase Referrals from Existing Hospital Referrals Sources through Participation in Accountable Care Organizations and Bundled Payment Programs
3. Increase Referrals from Existing Hospital Referrals Sources through Improvement in Admissions Processes and Criteria for Admissions
4. Develop Assisted Living, Adult Day Health Care, Home Health and Hospice Referral Sources
5. Develop and Implement Advertising Campaign
6. Develop and Implement Internet Strategy
7. Develop and Implement Public Relations Campaign
8. Develop and Implement Special Event Campaign
9. Train and Coach Team to Maximize Effectiveness

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**Strategies/ALF Case Study**

1. Develop Hospital, SNF, Home Care, Hospice and PCP referral sources.
2. Develop and Implement Advertising Campaign
3. Develop and Implement Internet Strategy
4. Develop and Implement Public Relations Campaign
5. Develop and Implement Special Event Campaign
6. Train and Coach Director of Community Relations and ED to Maximize Effectiveness
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Strategies/Memory Care (NP) Case Study
1. Develop marketing support tools
2. Educate existing referral sources about new program
3. Develop new referral sources in the behavioral/psych market
4. Develop new referral sources in the snf, alf, home care market
5. Develop community-based tactics to promote new program
6. Train and coach Marketing Director and Administrator to maximize effectiveness

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Tactics/SNF Case Study
Increase Referrals from Existing Hospital Referrals Sources through Education about RCC’s Competitive Advantage
- Participate in Vendor Fairs in appropriate hospitals
- Schedule in-services at appropriate hospitals
- Distribute new collateral materials to case manager
- Schedule in-services with hospitalist groups
- Host VIP open house

Increase Referrals from Existing Hospital Referrals Sources through Participation in Accountable Care Organizations and Bundled Payment Programs
- Meet with senior leadership to discuss ACO participation
- Coordinate monthly/quarterly participation in post-acute network participation
- Coordinate meetings at facilities with ACO teams
- Provide requested metrics for ACO participation
- Identify and make appropriate service changes to meet ACO requirements

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Tactics/SNF Case Study
Increase Referrals from Existing Hospital Referrals Sources through Improvement in Admissions Processes and Criteria for Admissions
- Begin 7-day per week admissions
- Expand criteria of admissions to reduce declines
- Expand external case managers’ decision-making capabilities to improve TAT
- Create and distribute collateral materials to case managers with new criteria for admissions and insurance contracts
- Credential case managers at all hospitals

Develop Assisted Living, Adult Day Health Care, Home Health and Hospice Referral Sources
- Create list of targets
- Schedule in-services with Executive Director, DON and other team members in targets
- Create networking events hosted at facilities

Develop and Implement Advertising Campaign
- Obtain pricing for various print and radio
- Create and place ads
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**Tactics/Case Study**

Develop and Implement Internet Strategy
1. Update website
2. Create Facebook Page
3. Update minimally monthly

Develop and Implement Public Relations Campaign
4. Create topics for press releases and advertorials
5. Create and implement placement schedule

Develop and Implement Special Event Campaign
6. Cardiology Education Event for Professionals
7. Educational Event @ Local Senior Centers
8. Networking Event Hosted at Facility
9. School Children Event @ Facility
10. Summer Concert Program @ Facility
11. Community Fall Festival Participation

**Tactics/Structure**

Tactic: Thanksgiving Event @ Facilities
Responsible Person: Activities and Marketing Team
Completion Date: November

Cost: 2016: $200 to $400
2017: $200 to $400
2018: $200 to $400

Tactic: Meet with Senior Leadership at RWJUH
Responsible Person: Administrators
Completion Date: June 30, 2016
Cost: 2016: $0

**Tactics/Memory Care (NP) Case Study**

Develop marketing support tools

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Responsible P</th>
<th>TDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create brochure</td>
<td>Luke/Karen/NP</td>
<td>4/1/2015</td>
</tr>
<tr>
<td>Create Postcards Direct Mail</td>
<td>Luke</td>
<td>3/31/2015</td>
</tr>
<tr>
<td>Create Ads for Placement in Newspaper</td>
<td>Luke</td>
<td>3/31/2015</td>
</tr>
<tr>
<td>Place Ads</td>
<td>Taylor</td>
<td>As appropriate</td>
</tr>
<tr>
<td>Send out Direct Mail Piece</td>
<td>Terri/Taylor</td>
<td>As appropriate</td>
</tr>
<tr>
<td>Uniforms</td>
<td>Karen</td>
<td>4/1/2015</td>
</tr>
</tbody>
</table>
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Tactics/Memory Care (NP) Case Study

Educating existing referral sources about new program

Targets: Kingwood, Conroe, Livingston, Solara, ICON, Healthsouth, Methodist, St. Luke’s Woodlands, Memorial Hermann (Humble, KW, WL), VA, Home Care and Hospices

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Responsible P</th>
<th>TDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Distribute brochure to all case mgmt/sw dept.</td>
<td>Terri</td>
</tr>
<tr>
<td>B.</td>
<td>In-service all targets that will schedule one.</td>
<td>Terri/Karen</td>
</tr>
<tr>
<td>C.</td>
<td>Educate case managers during follow up on referrals and hospitalized residents</td>
<td>Terri</td>
</tr>
<tr>
<td>D.</td>
<td>CEU programs for all case mgmt/sw dept.</td>
<td>Terri</td>
</tr>
</tbody>
</table>

Targets:
- Kingwood
- Conroe
- Livingston
- Solara
- ICON
- Healthsouth
- Methodist
- St. Luke’s Woodlands
- Memorial Hermann (Humble, KW, WL)
- VA
- Home Care and Hospices

Action Items:
A. Distribute brochure to all case mgmt/sw dept. Terri 4/1/2015
B. In-service all targets that will schedule one. Terri/Karen 4/30/2015
C. CEU programs for all case mgmt/sw dept. Terri Ongoing

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Tactics/Memory Care (NP) Case Study

Develop new referral sources in the behavioral/psych market

Targets: See attached lists

<table>
<thead>
<tr>
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<th>TDC</th>
</tr>
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</tr>
<tr>
<td>B.</td>
<td>In-service all targets that will schedule one.</td>
<td>Terri/Karen</td>
</tr>
<tr>
<td>C.</td>
<td>CEU programs for all case mgmt/sw dept.</td>
<td>Terri</td>
</tr>
</tbody>
</table>

Develop new referral sources in the snf, alf, home care market

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Responsible P</th>
<th>TDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Distribute brochure to all case mgmt/sw dept.</td>
<td>Terri</td>
</tr>
<tr>
<td>B.</td>
<td>In-service all targets that will schedule one.</td>
<td>Terri/Karen</td>
</tr>
</tbody>
</table>

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Developing and Executing a Strategic Marketing Plan

Tactics/Memory Care (NP) Case Study

Develop community based tactics to promote new program

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Responsible P</th>
<th>TDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Open House</td>
<td>Terri/Karen/team</td>
<td>6/25/2015</td>
</tr>
<tr>
<td>B. Educational Programs at Senior Center</td>
<td>Terri/Karen</td>
<td>4/1/2015</td>
</tr>
<tr>
<td>C. Educational Programs at Senior High Rise</td>
<td>Terri</td>
<td>4/1/2015</td>
</tr>
<tr>
<td>E. Educational event with Dr. Brams at CHCC</td>
<td>Terri/Karen</td>
<td>5/30/2015</td>
</tr>
<tr>
<td>F. Create ads to support above</td>
<td>Luke</td>
<td>As needed</td>
</tr>
</tbody>
</table>
Developing and Executing a Strategic Marketing Plan

**Marketing Plan Format**

- Marketing Plans created to be executed in a quarter (3 months)
- Excel Spreadsheet for Goals & Objectives
- Tactics are organized by strategy and include the following:
  - Action item to be completed
  - RP: Responsible Person who will complete the action item
  - TDC: Targeted Date of Completion for the action item
  - ADC: Actual Date of Completion when action item is completed
  - Notes: Information the team needs to know about the completion of an action item.
- To complete the marketing plan, a meeting should be held with the appropriate sales and marketing & operations/clinical team members to create the plan
- Create plan with input and buy in from all team members

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**Marketing Plan Creation Format**

- Marketing Plans created to be executed in a quarter (3 months)
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**Marketing Plan Execution & Accountability**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarterly</td>
<td>Create the Plan</td>
</tr>
<tr>
<td>Weekly</td>
<td>Schedule Action Items &amp; Review</td>
</tr>
<tr>
<td>Monthly</td>
<td>Review Plan</td>
</tr>
</tbody>
</table>

Best Practices
Census Growth
Developing and Executing a Strategic Marketing Plan

Marketing Plan Execution & Accountability

Best Practices

Schedule & Review marketing plan tactics weekly to ensure they are being completed - 30 minute meeting

Input date completed in ADC column and insert notes in note column (we call these accountability columns)

End of the 1st & 2nd months of plan have formal marketing plan review meeting with entire team (1 hour meeting). Review:

- Results from marketing plan execution
- Metrics (census, admissions, referrals, conversion rates etc.) and compare to goals and objectives
- Eliminate what doesn't appear to work (or adjust execution to see if you get better results)
- Add more tactics of what does work

End of 3rd month create new plan and celebrate your success

Conclusions

A Marketing Plan is an outline which describes how your organization is going to meet its census goals

A good marketing plan has the following 4 elements:

- Goal: One specific & measurable number which defines top line success
- Objectives: 3 to 5 specific & measurable numbers which when achieved will enable your organization to reach its goal
- Strategies: Broad statements which define how your organization will achieve its objectives
- Tactics/Action Steps: Specific actions, accomplished in a specific time frame by a designated team member
- It is organized to be achieved in quarterly (3 month) stages

Contact Information

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484-419-5846
lukefannon@petmarketing.com

Call for a free consultation or if you want to ask me any questions!
Our services include: Sales and marketing training, coaching, strategic marketing plan development, strategic consulting services
All of our programs are approved by NAB for LNHA and CALA Administrator CEUs.