**Template:**

**A Step-by-Step Marketing Plan and Budget for Your Medical Spa**

**(Your Business Name)**

**Marketing Plan**

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| **Marketing Goals**  What are your three most important business goals for the next six months to a year? Write down your S.M.A.R.T (specific, measurable, attainable, relevant, time-bound) goals below. For example: “Get my injectors to 75% of capacity each month by the end of the first quarter.” |
| 1.  2.  3. |
| Business Summary: Who are you?  Defining who you are as a medical spa helps you determine your best patients. (A tip here: Think bigger than where you are today. While you may have “decades of experience” or consistently deliver “results that turn back the clock,” those things aren’t *who you are* in a way that brings goals to light. They’re *what you do*. Go a little deeper.) |
| Where are you located?  What service(s) do you provide?  What makes your medical spa different from every other place patients could go for  your services?  What are you known for—and what do you wish you were known for?  How can you continue to improve? |
| Target Market: Who’s your ideal patient?  Defining your best patient is key to evaluating your offerings and what marketing methods you should use, ranging from online ads and email marketing campaigns to cross-promotions with other businesses, pop-up events, and open houses.  Also, keep in mind that your *ideal* patients may or may not look like your *current* patients. If they don’t look alike, it’s time to reimagine your marketing efforts to reach out to this new demographic. |
| Predominantly female or male? Or about equal, ideally?  How old are they?    Where do they live?    Where do they work?  What do they value?  What motivates them to come to you?  How can you honor those motivations? |
| Strategy: How will you reach your ideal patients?  Now it’s time to outline the ways you’ll attract, convert, and retain patients  at each point of their journey—from awareness to advocacy.  Awareness: How will you help new patients find your business? |
| Which (if any) traditional advertising outlets will you use?  Will you host pop-up events? Open-houses? How will you encourage patients to attend (e.g., discounts or a chance to win a free treatment during the event)?  Is your website live? If not, who will build it? Does your business management software integrate so clients can easily book services?  Are your profiles set up and optimized on Yelp, Bing, and Google? How about on your vendors’ websites, like Allergan®?  Do you have co-op dollars from any vendors (think CoolSculpting®)? How do you plan to use them?  Do you plan to run Pay-Per-Click (PPC) ads?  What social media platforms will you use?  Are your social media profiles fully optimized?  Do you have a staff member who’s responsible for posting and engaging regularly?  Do you plan to run social media ads? What will you promote? |
| Action: How will you convert prospects into patients? |
| What’s your introductory offer for new patients? How will you promote it?  When potential patients show interest in a consultation, what’s your plan for follow-up phone calls to explain what the first visit is like? |

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| Loyalty: How will you keep patients coming back? |
| How will you check in with patients after their first few treatments?  How will you stay in touch with existing patients?  How will you get existing patients to return when you haven’t seen them in a while?  How will you help patients understand related treatments that can enhance their results? (Related question: Do you know and track which treatments patients are likely to pair together?) |
| Advocacy: How will you retain patients and encourage them to spread the word? |
| How will you encourage happy patients to write reviews (and promote the ones you  receive)?  Do you have a referral program to reward your most loyal patients?  How will you stay connected with your current patients? Events? Social media contests? Live treatment Q&A sessions? |

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| **Budget**  What’s your monthly marketing budget? How much will be allocated to each strategic effort?  Double click on the chart, below, to input into the Excel spreadsheet |
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| **Key Performance Indicators (KPIs)**  KPIs  Are you seeing results from your marketing? Your KPIs will help you evaluate your efforts and see if you’re reaching your goals.  Remember: Marketing takes time. While you’ll want to keep tabs on your KPIs every month, you’ll really only need to re-evaluate every six months.  Double click on the chart, below, to input into the Excel spreadsheet |
| New Clients: This number should grow every month. If not, you’ll likely want to increase marketing efforts and spending related to Awareness.  New Patient Offers Sold: Not where you want to be? It might be time to reevaluate your introductory offer duration and price. Here are some [tips for successful intro offers in the MINDBODY app](https://support.mindbodyonline.com/s/article/215861297-Tips-for-successful-intro-offers-in-the-MINDBODY-app?language=en_US).  Referral Types: What are the top three ways customers hear about your business? If word-of-mouth referrals are two to three times higher than other forms, are you tracking the other ways? If not, people may simply not remember and report “word of mouth.” If you are tracking them, though, consider revisiting your marketing mix, seeing where people are dropping out of their interactions with you, and/or investing more in your marketing budget. |

MINDBODY has everything you need to run your medical spa and achieve your goals.

Visit <https://www.mindbodyonline.com/wellness-management-software> to find out more.

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