

MARKETING PLAN

A targeted and focused marketing plan is crucial to the successful growth of a bariatric program. The bariatric team should work collaboratively with the marketing and public relations (PR) team to strategize and develop a plan that will achieve program goals. A marketing plan is derived from information gained from a SWOT (strengths, weaknesses, opportunities and threats) analysis along with a strategic vision statement of where the bariatric program would like to be three to five years in the future. The bariatric team should provide the marketing and PR professionals a SWOT analysis and vision for the future. Equipped with this information, the teams can begin to strategically plan the strategic efforts that will work towards achieving the long-range bariatric program goals.

If the bariatric program is new or in its early states, development of a comprehensive marketing plan is suggested. This plan would include but not limited to the following:

- I. Market Situation: Overview of existing program
 - a. History of program
 - b. Operations/services offered
 - c. Target population
 - d. Competitive advantage
 - e. Current volume or desired first year volume
 - f. Current market share or desired first year volume
 - g. SWOT Analysis
 - h. Competitors
- II. Marketing Solution (How a marketing plan can help the current situation)
- III. Marketing Goals (be specific on what is to be achieved)
- IV. Marketing Objectives (state the overall objective of the campaign)
- V. Marketing strategies (be specific with actions)
- VI. Monitoring plan for effectiveness

An in-depth analysis and review is helpful to educate the marketing and PR team on how to proceed and position the program to achieve its goals.

For programs that are more established and need to re-define themselves or expand, a more focused approach is suggested.

The first step is to develop the strategic vision. This is a statement of where the program will be in the future. It should be concise and detailed. For example:

ABC bariatric program aims to be a market leader by increasing market share by 20% from the current market share of xxx by (year) by offering (insert competitive advantage/s here) to (insert patient population here) in (geographical region)

Once the strategic vision statement is finalized, planning efforts to achieve goals begin. The next step is to develop the strategic plan. At this stage, it is important to know the current market

share captured by the bariatric program, community physician referral patterns, competitor analysis (position in the market, strengths, weaknesses, etc.) market pricing, the bariatric program SWOT analysis, and most importantly, the marketing budget allocated. Once all this data is collected, it should be reviewed and discussed by all members of the team and the marketing efforts identified.

An outline should be simple and include but not limited to the following:

- I. Strategic Vision Statement
- II. Tactics (list specific actions to achieve vision)
 - a. Enhance website by adding xxx
 - i. Optimize website by using keywords to appear higher on the page in organic searches
 - ii. Paid online strategy (pay per clicks)
 - iii. Banner ads
 - b. Enhance social media presence by XXX
 - i.e. Facebook page, Twitter, Pinterest, Instagram, Blog, YouTube
 - c. Develop collaterals (marketing materials) to distribute to xxx
 - i. List the collaterals needed i.e. brochures, flyers, etc.
 - ii. Advertise on radio/TV xxx each week/month -List radio and TV station and schedule
 - d. Perform/expand physician outreach
 - i. List physicians specialties to target
 - ii. List who will do this and when
 - e. CME presentations (what topics and when)
 - f. Print ads -List publications and when/ how often to advertise
 - g. Offer promotional pricing during the months of xxx
 - h. Host/participate in an XXX event at (location) on (date)
 - I.e. Fashion show, live seminar, health fair, benefit fairs at local companies
 - i. Press releases on XXX topic
 - I.e. List new technology used or new procedures, Interesting patient story
 - j. Develop partnerships with XXX to enhance visibility and awareness (for hospital based programs, identify other departments with similar patient populations and co-market)
 - k. Develop patient retention strategy to include XXX.
 - I.e. Newsletter, support groups, cooking classes, grocery store tours, fitness classes.
- III. Outcomes monitoring of plan – adjust tactics as needed.

Bariatric programs are encouraged to be as creative and original as possible when developing a marketing strategy. It is important to also ensure that the patient intake process is well established and flows smoothly. A negative impression is created if the marketing plan significantly improves volume and the bariatric program is not ready to receive or process the inquiries. A comprehensive review and updating of current processes coupled with detailed staff education on how to respond to the growth is essential.

The last step in a good marketing plan and campaign is to measure its success. The bariatric program and marketing team should establish how and who will monitor the outcomes such as return on investment, market share index, surgery volumes, number of new visitors to website, new physician and patient referrals, and other available analytics. Determine how often the monitoring will occur and report monthly or quarterly to the team. It is important to make adjustments to the plan over time if it is determined that some initiatives are working better than others.

Once the bariatric program successfully converts interest to consult to surgery, it is important for the bariatric program to implement ways to retain patients after surgery. Analyze the bariatric program from a patient's perspective. What do patients want? What is motivational and interesting to them? How do programs keep patients connected? Each bariatric program should create support services aimed to meet the unique needs of post op patients throughout their entire journey. What may be motivating for an early post-op patient may not be of interest to those 2 years or more post-surgical. Bariatric team meetings with input into these issues help to develop pertinent initiatives to improve patient retention and follow-up.

Regardless of the business structure of private practice, hospital-based, academic medical center or other business design, working with skilled marketing professionals will significantly help to improve bariatric program volumes and market share through targeted marketing tactics and strategies. Developing a clear vision with meaningful objectives will help to develop the right plan to meet the target goals.