

Assessing Your Internal Marketing

Purpose: Assess how well your practice is implementing internal marketing as a strategic approach to laser vision correction procedure growth and development. Analyze doctor and staff commitment to the business and service processes that support internal marketing. Review your current patient support materials for accuracy, currency, and consistency and identify materials for changes or updates.

Preparation: Gather the patient support materials regularly circulated in your practice.

Practice name: _____ Date: _____

Doctor and staff commitment to LVC

	Yes, definitely	Somewhat	Not at this time
A. Regular staff meetings update everyone on goals and other information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Continuing education and training programs are in place for staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Staff scheduling is continuously adjusted to manage LVC growth.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Staff are encouraged to make suggestions to streamline and improve internal systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Time is allocated for planning and assessment of the LVC practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. A budget has been developed for LVC internal marketing programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Doctor pro-actively discusses LVC with potential candidates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Staff proactively discusses LVC with potential candidates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I. Staff seeks to understand and use knowledge about LVC.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Internal marketing operations

	Yes, definitely	Somewhat	Not at this time
A. Incentive programs reward/celebrate success.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Job descriptions and duties are designed to optimize patient service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Employee performance is evaluated for patient service and LVC teamwork.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Procedures for handling LVC inquiries and follow up are in place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Computer and telephone tools are available for LVC.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Procedures for handling difficult patient interactions, schedule delays, and similar situations are clearly communicated and performed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Marketing calls are handled away from the front desk.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Telephone system is audited routinely and updated if needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I. Telephone protocols are developed and monitored.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
J. Incoming and outgoing marketing calls are documented.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
K. Marketing call data is updated at least 3 times a week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L. Patient surveys are distributed, collected, and analyzed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M. Magazines and books are current and well-stocked.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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- B. How often does your staff check that these support materials are in stock?
 Bi-monthly Monthly Quarterly Semi-annually
- C. Are all of your support materials marked with your practice's contact information?
 Yes No
- D. Are all of your support materials marked with your logo and slogan?
 Yes No
- E. When do you offer these support materials to prospective patients?

Patient Information Packets

- A. Are the materials in the Patient Information Packets packaged in the same order each time they are compiled?
 Yes No
- B. How do you package or group the materials together?

- C. Do you have a master packet for staff reference?
 Yes No

WHAT NOW?

Share your completed worksheet with your BDM as you work together to develop an Action Plan. Keep your completed worksheet for future reference — it will serve as an instructive benchmark of your practice at this point in time.