

## **Teamwork: Creating a Marketing Team Utilizing your Staff**

**Presented by Nancy Hyman**

### **Why Develop a Marketing Team?**

Back in the old days...

Successful enough

Lack of training or plan

Roles not defines

### **Today**

Full team supports internal and external program

Give full team a chance to shine!

You are a talented team!

### **Benefits to Building a Marketing Machine**

Camaraderie

Talents are identified

Each team member is valued

Practice Success

Team hours fully utilized

### **Five Key Steps**

**Organize leadership**

**Leadership qualities**

**Assign responsibility: 4 scenarios**

**Accountability and team cooperation: Long term event plan and daily activities**

**Doctor's role**

## **FIVE KEY STEPS AND SAMPLES**

### **Organize Leadership**

1 Team Leader plus Team

TL reports to Doctor and/or Manager

Offices of 6 or less are all on the team

Project categories

Assign sub-category teams

### **Leadership Qualities**

Non- patient time to organize/complete tasks

Multi-tasker

Enthusiastic!

Excel spreadsheets

Google Docs

Manual Sheet

Do not shirk other responsibilities: Takes time!

### **Assign Responsibility**

Team leader assigns sub-leaders per category

Sub- leaders meet with their team weekly or monthly

Select from current team

Outside resources

Statistics reviewed monthly

Dated events: meet weekly

Daily events: meet monthly

### **Four responsibility scenarios**

DDS Relations

Photo booth

Asking Patients for Referral

OSHA Meeting

### **Team 1: DDS relations**

Nancy is sub-team leader *plus* Dr. Hyman *plus* Chris

Nancy (manager), Chris (creative) and Dr. Hyman

Chris: Create monthly target list drawing (12 per year)

Create lunch drawing (created once)

Create annual event invitations

Create referral cards

Bulk email support

DDS Visits:

Nancy: Target list and routes

Nancy and Dr. Hyman: Select Thursday mornings

Nancy: Deliver lunch winner meal

Deliver target list drawing winner gift card

Deliver OH winner gift card

Nancy: Referral card rotations

Nancy: Invitations

OSHA meeting

Flu Shot

Pink's Hot Dogs Holiday Party

### **Team 2: Photo booth**

Ernest (RDA) is sub-team leader *plus* clinical team *plus* Chris *plus* Patty (front office)

Train Photo booth team

Clinical Team with select stand-outs

Patty offers at initial exam tour

Website: Photo booth section

### **Team 3: Asking Patients for Referrals**

Valerie (Front Office) is sub-team leader *plus* balance of Front Office Team (two) *plus* Chris

Valerie: AFR and coach team

Every parent/patient every time!

Chris: Create patient to patient referral cards (review annually)

### **Team 4: OSHA Meeting (bi-annual)**

Dr. Hyman *plus* full team

Chris: Save the date and invitations created (email and hard copy)

Front office team: mailing, collate responses and reminder calls (non-respondents and attendees)

Nancy: Speaker contract, venue and menu

Nancy and Dr. Hyman: Personal invitation to DDS office

Day of event:

- Registration

- Nancy, Dr. Hyman and two team members greet and register

- Full team: spread out!

- Full team: Distribute OSHA certificates

### **Accountability and Team Cooperation**

Meet consistently

Check task lists daily

Change roles when needed

Rewards

1 year overview

Break into 3 month segments

Work backwards

Check in weekly

Team leader and Sub-leaders

Full marketing team meet monthly

Doctor attends monthly meeting?

### **Long Term Event Plan**

6-7 months prior: Save the date

Hand deliver and mail

4 months prior: Invitations

Hand deliver and mail

3 months prior: resend to non-respondents

1 month prior: call/fax non-respondents

1 week prior: confirmation letter and directions

2 days prior: reminder phone call

### **Daily activities: Meet monthly for statistical review**

Asking patients for referrals (family and friends)

Photo-booth posts

DDS referrals calls

### **Doctor's Role**

DDS Relations: Visits, lunches, promote and attend doctor sponsored events, progress reports and other communications

Photo-booth: Take photos with patients

AFR: What is your comfort level?

OSHA meeting: Front and center at event