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