



MARKETING SURVEY & CHECKLIST FOR PROFITABLE NATUROPATHIC PRACTICES

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Is marketing your weakest link/skillset? Do have a clear vision for exactly what you need to put into place to accelerate your practice growth?

The following survey and check-list will help you assess the most important and effective marketing elements that work for the best Naturopathic practices.

- ☐ Ideal Client Description – documented and written out.
 - I understand my ideal client and market. I understand their needs and desires, personality, perspectives, lifestyles... almost better than they do. And Yes, It's written down on my business binder.
 - I pretty much know who my ideal client is, I just haven't fully written it down anywhere.
 - I am still working on getting clarity about this.
- ☐ Main message to my ideal client market – documented and written out. Their problem; your solution; your promised successful result.
 - I'm not that clear on how to articulate my main message(s), but I pretty much know in my mind what it is.
 - I'm not clear what my message should be nor how to articulate it.
 - I'm not sure how to articulate a problem/solution statement for my practice.
- ☐ Have developed "narrative/story" of my business as it relates to ideal client/market. (similar to message only lengthier.)
 - Yes
 - No

- ☐ Have purchased and registered a domain name for my business and have recorded the details (including registrar) in a safe and organized location.
- ☐ Website & hosting company
 - In place.
 - Not yet built or being built.
 - Value downloads that build credibility and expertise with Opt-in system for mailing list or email sequences.
 - Videos.
 - Scheduler.
- ☐ Paying for SEO service.
- ☐ Google advertising.
- ☐ Facebook Advertising/Sponsor/Boost.
- ☐ I regularly track results (analytics) from my SEO and/or ads; I know how effective it is being for my business.
- ☐ I have Autoresponder/email sequence system set up for automated follow up to new leads, especially those who opt-in for our educational pdf, video or newsletter.
- ☐ I have a tracking system/structure in place for all of my marketing strategies so that I know where most of my high-quality clients are coming from and which marketing strategies/tactics are the most effective.

Word of mouth/relationship marketing is among the most effective, with the least time and expense involved. It's easy to deploy but must be done so intentionally.

Client Referrals

- ☐ Have regular, weekly client referral request conversations
- ☐ Have referral cards and system for rewarding/thanking.
- ☐ Have referral request letter; send to new clients.
- ☐ I don't do anything yet, but I'd like to have more of my clients referring people to me.
 - ☐ I regularly track results from my client referral system; I know how effective it is being for my business.
 - ☐ I have clear results / purposes articulated for what I want this medium to produce.

Testimonials/Reviews

- ☐ Have system/process for regularly requesting client testimonials or reviews (google, yelp, fb...)
- ☐ I regularly copy/past reviews and testimonials to my website page(s).

Business Alliances

- ☐ Have a plan and system for developing and nurturing professional referral alliances
- ☐ Do not have a plan/system; Would like one.
- ☐ I have _____ (number) regularly referring alliances.
- ☐ I meet/connect with them ☐ monthly ☐ biannually ☐ annually
- ☐ Regularly network: ☐ Weekly Group ☐ Social community events ☐ Chamber
 - ☐ I regularly track results from my business alliances and community events; I know how effective it is being for my business.
 - ☐ I have a clear purpose / intended results articulated for what I want this to produce.

Inactive Clients/Patients

- ☐ I never reach out to inactive patient/clients. I assume if they need us they'll call.
- ☐ I send out birthday cards or something in their mail once a year.
- ☐ We have an email drip/email sequence or "newsletter" that patients/clients receive regardless of being under active care or not.
 - ☐ I regularly track results from my past clients; I know how effective it is being for my business.
 - ☐ I have a clear purpose / intended results articulated for what I want this to produce.

Networking & Community Involvement In person or Virtually

- ☐ I don't have time to network.
- ☐ I attend a regular networking business group.
- ☐ I belong to our chamber of commerce and/or regularly meet with/network other business owners in order to tap into their circle of influence.
- ☐ I am in and regular contribute to or lead at least one online private group.
- ☐ Regularly network: ☐ Weekly Group ☐ Social community events ☐ Chamber
- ☐ I regularly track results from my business alliances and community events; I know how effective it is being for my business.
- ☐ I have a clear purpose / intended results articulated for what I want this to produce.

Social Media

- Accounts set up with ☐ Facebook ☐ LinkedIn ☐ Instagram ☐ Yelp ☐ Tick-Tock
- Regularly Post to above: -----
- Type of postings are: ☐ Daily ☐ Weekly ☐ Monthly
- ☐ Generic ☐ Specific & Educational with CTA
- ☐ Includes Video ☐ Includes Photo ☐ Just text

- ☐ I regularly track results from my social media; I know how effective it is being for my business (I know how many qualified leads it is producing.)
- ☐ I Have clear purposes / intended results articulated for what I want each of my social media tactics to produce.

Email Marketing/Blog combo

- ☐ Article emailed to database and also posted onto blog page: ☐ Weekly ☐ Monthly
- ☐ Video Marketing – educational: ☐ Sent via email ☐ Uploaded to FB
- ☐ Have or plan to have an Autoresponder/email sequence system in place for automated follow up to leads, especially those who opt-in for our value free-be or newsletter.
- ☐ I send regular marketing/promotional emails to my data base of customers: ☐ Weekly ☐ Seasonally
- ☐ I regularly track results from my email marketing & blogs; I know how effective it is being for my business (I know how many qualified leads it is producing.)
- ☐ I Have clear purposes / intended results articulated for what I want my email marketing & blogs to produce.

In-house mailings

- ☐ New Customer Letter mailed: ☐ With referral cards
- ☐ Customer Birthday Cards mailed: ☐ With offer/promo/discount ☐ Without
- ☐ Customer Holiday Cards mailed
- ☐ Newsletter ☐ USP mailed to customer data base ☐ Emailed to customer data base
- ☐ Seasonal promo offerings sent via email ☐ 1x a year ☐ 2x a year ☐ 3x a year ☐ 4x a year
- ☐ I offer/promote Gift Certificates. I track and follow up and pre-schedule recipients.
 - ☐ I regularly track results from my mailings; I know how effective it is being for my business.
 - ☐ I have a clear purpose / intended results articulated for what I want the above to produce.

Host Events

- ☐ Customer event at facility
- ☐ Other _____

Public Relations/Advertising feature

- ☐ TV feature or advert ☐ Radio feature/advert ☐ Print advertisement or Feature article
- ☐ Mainstream Media outlets ☐ Book/eBook
- ☐ I have a clear purpose / intended results articulated for what I want this to produce.

Speaking

- | | | | |
|--|----------------------------------|------------------------------------|---------------------------------|
| <input type="checkbox"/> Give Live talks: | <input type="checkbox"/> Monthly | <input type="checkbox"/> Bi-annual | <input type="checkbox"/> Annual |
| <input type="checkbox"/> Host Webinar: | <input type="checkbox"/> Monthly | <input type="checkbox"/> Bi-annual | <input type="checkbox"/> Annual |
| <input type="checkbox"/> Host in-person local workshops: | <input type="checkbox"/> Monthly | <input type="checkbox"/> Bi-annual | <input type="checkbox"/> Annual |

- ☐ I regularly track results from my speaking events; I know how effective it is being for my business.
- ☐ I have a clear purpose / intended results articulated for what I want this to produce.

Direct Mail Advertising

- ☐ Direct mail mailing to local region
 - ☐ I regularly track results from my direct mail campaigns; I know how effective it is being for my business.
 - ☐ I have a clear purpose / intended results articulated for what I want this to produce.

Branding

- ☐ Logo. Colors. Shapes. Fonts. Images. Photos. Icons.
- ☐ I have the above elements identified in a style guide document and use them to ensure uniformity and cohesiveness in all forms of communication that go out including website, social medial posts by me or my staff, and other documents that we produce for clients or marketing.
- ☐ Signage.
- ☐ Business Cards.
- ☐ Collaterals (brochure/rack cards, etc).

Being a great naturopathic doctor, or other wholistic practitioner is not the same skill as being a highly effective business owner who generates repeatable bottom-line results.

You are an expert at helping your clients and patients get healthy, learn better habits, feel good and be whole.

Are you an expert at growing your business, attracting new clients, retaining them, and sustaining your business growth? Are you an expert at managing your time well? Are you an expert at managing your finances in a manner that causes your business to thrive? Do you have the confidence for leading, managing and inspiring others? Do you have an empowering mindset that keeps you positive and motivated? Do you know how to focus on just the right marketing actions for a Naturopathic practice? Are you good at consistently repeating your successes?

If you are not, and you want to be, you can be. Business and Entrepreneurial skills can be learned, just like the knowledge and skills of natural medicine, nutrition, and therapies.

If you want to be great at the business side and have a profitable, sustainable business, that doesn't run you ragged, then it's time for a little natural medicine business training.

Call or click the link below for a private Business Analysis session. It will give you valuable insight into how you can:

- o improve your effectiveness at business,
- o increase your income,
- o increase the number of clients you serve and ultimately
- o lead you to that level of financial success and freedom you've been yearning for..

This valuable hour gives you an experience of what it's like to have a professional naturopathic business coach directly mentor you through strategies, systems and even patient management methods. You will finally know exactly what work will be necessary to have you grow your business and directly impact your results for the better.

Schedule a Free, Private Business Analysis – Strategy Session

877.239.0340

Or, [Metromm.com/Free-resources/Business-Analysis](https://metromm.com/free-resources/business-analysis)