

**Your List**



**Presentation**



**Products**

# Strategic Marketing Planner

**START**



## Clients

+ Add client

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Clients



Presentation



Products

## Clients

+ Add client

A

Bill Watson

Jack Milton

Kim Hopkins

Maria Smith

Chuck Willis

Ryan Phillips

Pauline Simmor

Jane Fletcher

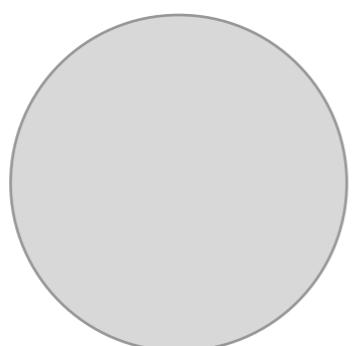
Erick Roy

B

Bill Watson

Jack Milton

Kim Hopkins



First Name

Bill

Last Name

Watson

Practice Name

Sorenson Family Dental

Phone

801-231-4421

Email

bill@sfdental.com

Address

335 Main Street

Zip

84112

Initial Contact

10/13/17

Notes

Bill is the office manager of SFD. He works at his office Monday through Thursday between 8:00 and 6:00. Best to reach him by text. Loves Utah State football.

Save Contact

Start Presentation

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## Clients

+ Add client

Cancel

## Edit Client

Done



First Name

Bill

Last Name

Watson

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Sorenson Family Dental

Phone

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335 Main Street

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Delete Contact

Start Presentation

## Calculator

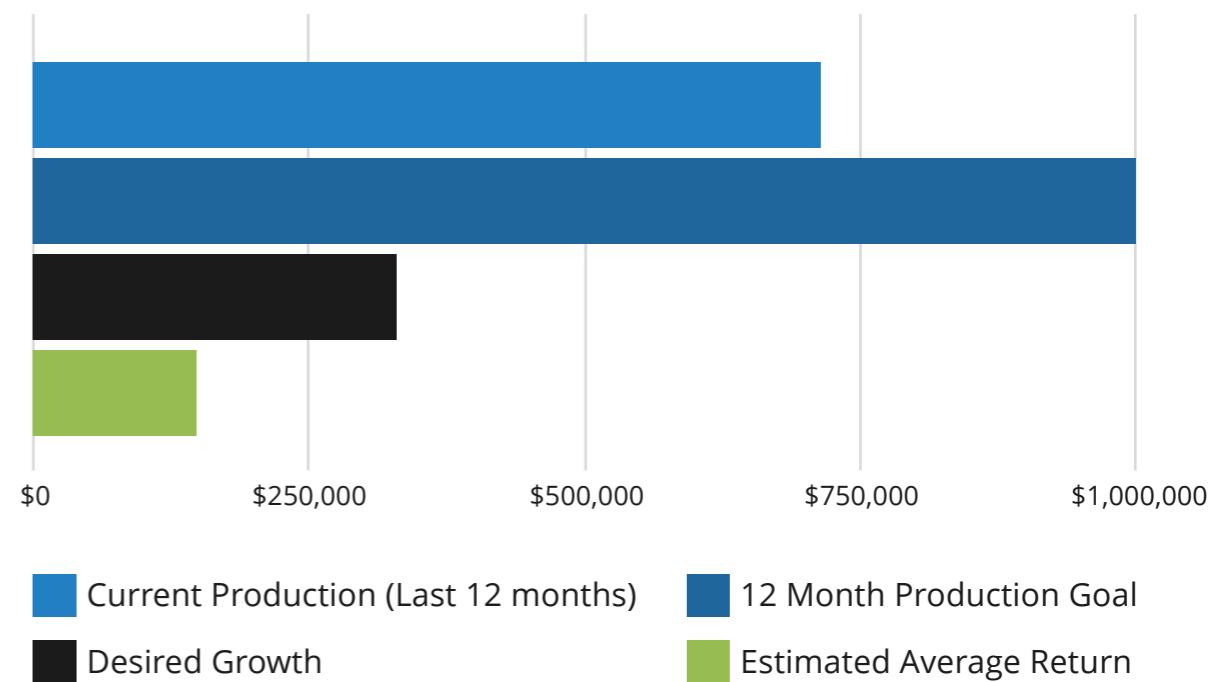
Client's Name



## Growth Goal

Current Production (Last 12 Months)	\$1,440,000
12 Month Production Goal	\$1,004,000
Desired Growth	\$345,000

## 12 Month ROI Estimate



## 5 Year ROI Estimates

Year 1	\$75,000
Year 2	\$150,000
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Clients



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Your Budget

Brand Definition

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## Brand Definition

Every marketing relationship should start with a process of understanding. We need to know how to tell your story and communicate your experience effectively.

The quality and quantity of your patient base will always be a direct result of the perceptions you create through your messaging.

For this reason, included in every Dental Branding marketing plan is a Brand Definition process. Your Dental Branding Marketing Strategist will work with you to develop a powerful message that is custom to you and differentiates you from your competition.

What's included in the Brand Definition?

### VISION & VALUES:

- A vision statement
- Defined core values
- An explanation of how to incorporate the vision & values
- Exercises to integrate your vision & values with your team

### DIFFERENTIATION:

- Your tag line
- Your headline
- Your key benefit bullet points
- An explanation of how to incorporate your differentiation

### COMPETITIVE ANALYSIS:

- An Analyzation of 6 competitor's websites
- An explanation of how to analyze your competitor's messaging to ensure differentiation

### TRUST BUILDING:

- Defined key benefit bullet points
- An explanation of how to use this foundation for messaging

### YOUR AUDIENCE:

- Demographics by population, households, income, ethnicities & median age
- An explanation of how we use the demographics



Clients



Presentation



Products



Your Budget

\$0/\$3000

Brand Definition

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Internal Marketing

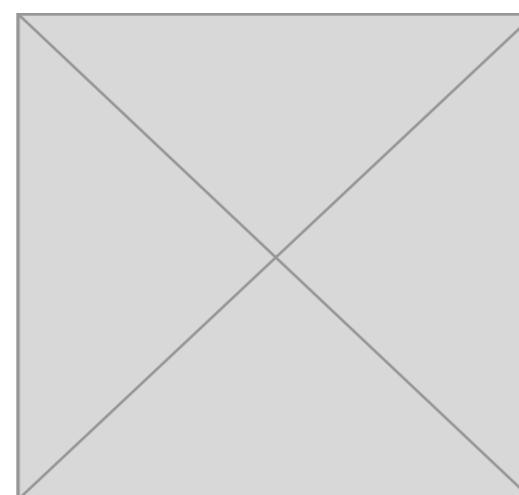
External Marketing

Marketing to Suburban

Summary + Confirmation

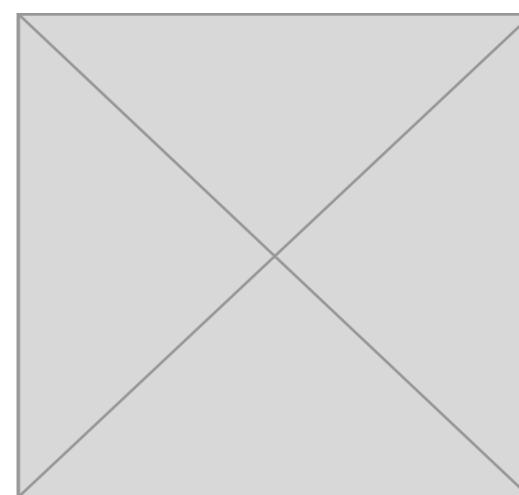
Next Steps

# Foundation Options



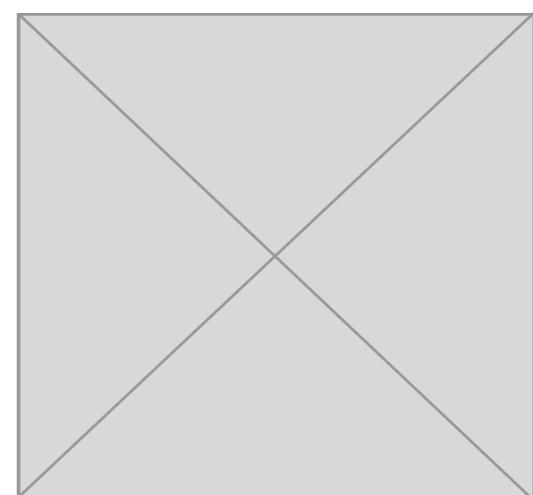
## Custom Logo i

- 4-6 initial logo concepts
- Up to 5 rounds of revisions
- Talk with an art director

Add

## Responsive website w/ 12 months hosting

- 4-6 initial logo concepts
- Up to 5 rounds of revisions
- Talk with an art director

Add

## Video and Photography

- 4-6 initial logo concepts
- Up to 5 rounds of revisions
- Talk with an art director

Add

Clients



Presentation



Products



Your Budget

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# Internal Marketing



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# External Marketing

## Urban

A digital marketing focus ideal for highly populated areas.

## Urban

A mix of digital and traditional marketing to maximize results in a suburban demographic

## Urban

A traditional marketing focus ideal for rural areas

## Digital Marketing

## A Mix of Digital and Traditional

## Traditional Marketing



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## Marketing to Suburban



Clients



Presentation



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Calculator

Client's Name



Your Budget

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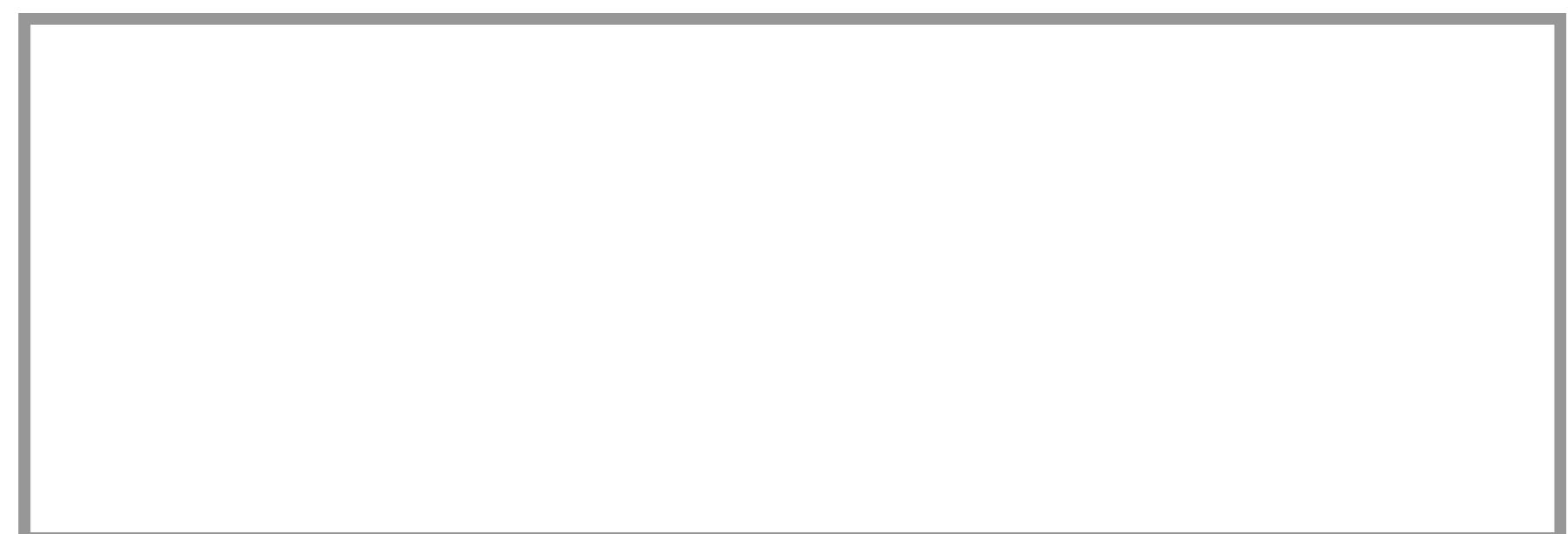
External Marketing

Marketing to Suburban

Summary + Confirmation

Next Steps

## Summary + Confirmation



---

Dental Branding Email

---

---

Henry Schein Email

---

---

Client Email

---

**Send Email**



Clients



Presentation



Products



Your Budget

## Next Steps

Brand Definition

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Marketing to Suburban

Summary + Confirmation

Next Steps



Clients



Presentation



Products

# Welcome!

We want to help you make money.  
Let's get started

Name

Email

Password

Password

Create Account



Your List



Presentation



Products

## Clients

[+ Add client](#) Search

A

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Your List



Presentation



Products

## Clients



Cancel

## Edit Client

Done



First Name

Dallin

Last Name

Rees

I think right here we have the opportunity to include either

1. Information that is going to help people follow up
2. Information to track progress
3. Information that they will commonly need during the process
4. All of that.
5. Graphs of what is changing with them.

Delete Contact

Start Presentation

A

Bill Watson

Jack Milton

Kim Hopkins

Maria Smith

Chuck Willis

Ryan Phillips

Pauline Simmons

Jane Fletcher

Erick Roy

B

Bill Watson

Jack Milton

Kim Hopkins

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## Calculator

Client's Name



## Your Budget

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Marketing to Suburban

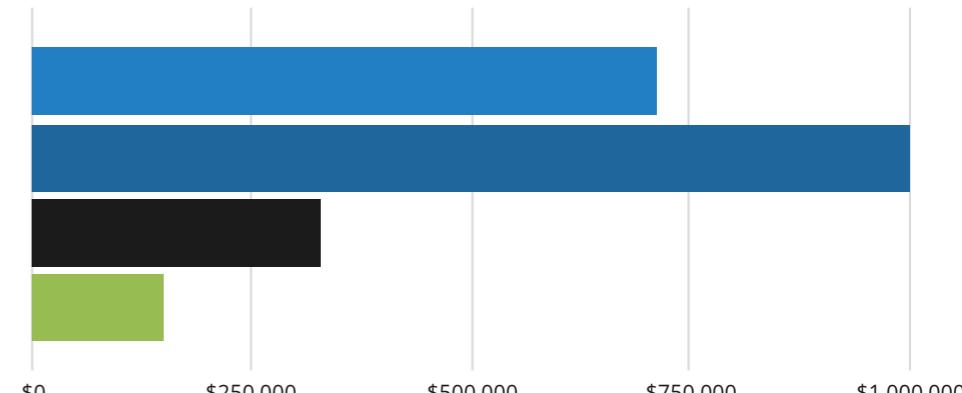
Summary + Confirmation

Next Steps

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## 12 Month ROI Estimate



## Estimated Budget Returns

Monthly Marketing Budget	\$5,000
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## Monthly Budget

&lt;\$2,499

\$2,500 - \$3,499

\$3,500 - \$4,999

\$5,000 +

## Typical annual rate of return

150-300%

200-400%

250-500%

300-600%



Clients



Presentation



Products



Your Budget

\$0/\$3000

Brand Definition

Foundation Options

Internal Marketing

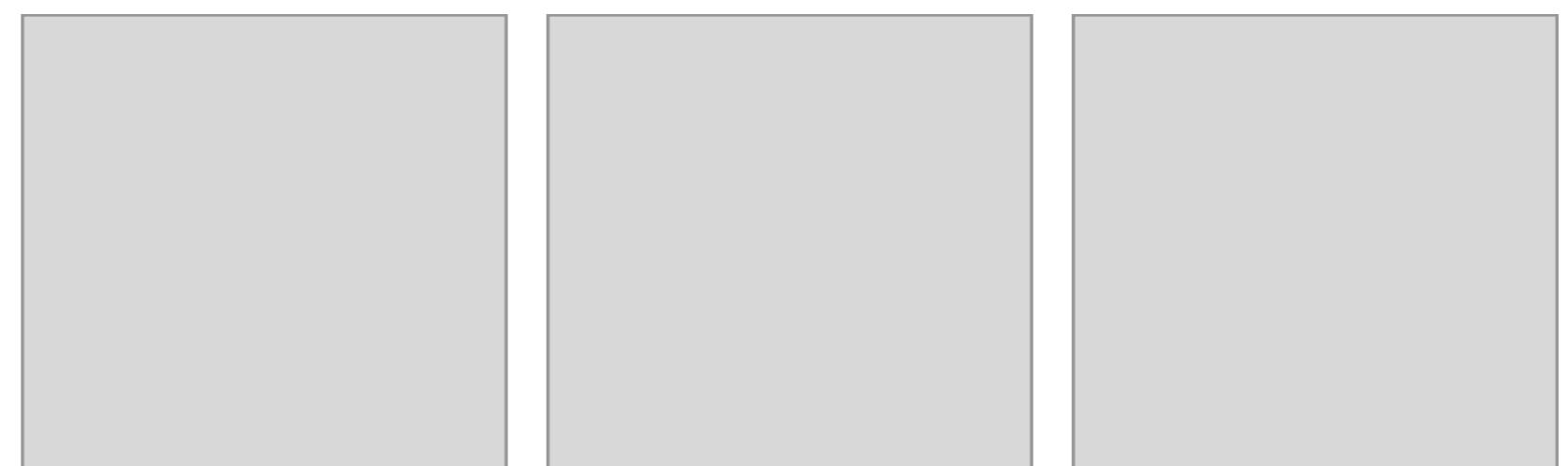
External Marketing

Marketing to Suburban

Summary + Confirmation

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## Foundation Options



### Custom Logo



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### Video and Photography

- 4-6 initial logo concepts
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[Add](#)[Add](#)[Add](#)

Clients



Presentation



Products

## Clients

+ Add client

 Search

**Let's start by adding a client!**

Click the "Add Client" button in the  
top right corner.

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Your List



Presentation



Products

## Calculator

Client's Name



Previous

Next

## Growth Goal

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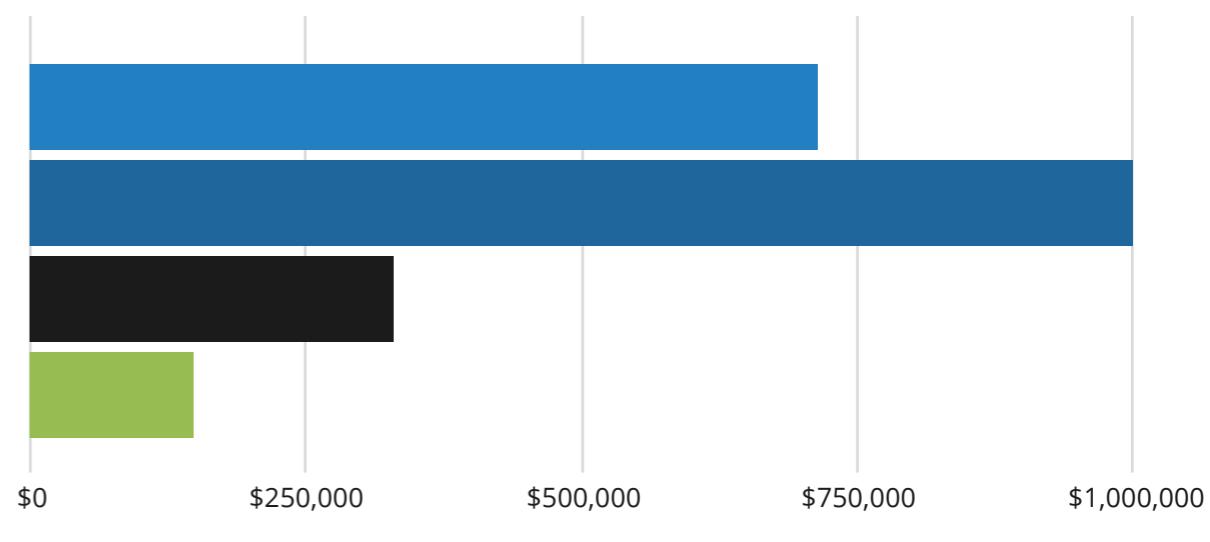
## Monthly Budget

- <\$2,499
- \$2,500 - \$3,499
- \$3,500 - \$4,999
- \$5,000 +

## Typical annual rate of return

- 150-300%
- 200-400%
- 250-500%
- 300-600%

## 12 Month ROI Estimate



Current Production (Last 12 months)       12 Month Production Goal  
 Desired Growth       Estimated Average Return

## 5 Year ROI Estimates

Year 1	\$75,000
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Clients



Presentation



Products

## Calculator

Client's Name



## Your Budget

Brand Definition

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Marketing to Suburban

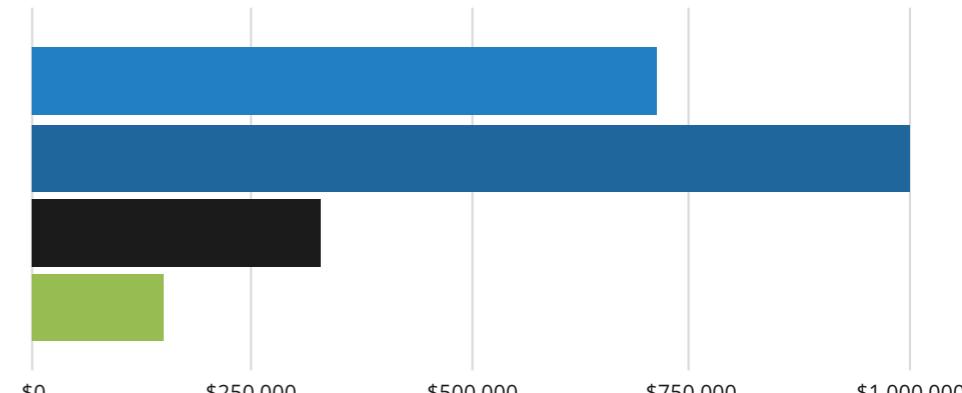
Summary + Confirmation

Next Steps

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\$3,500 - \$4,999

\$5,000 +

## Typical annual rate of return

150-300%

200-400%

250-500%

300-600%



Clients



Presentation



Products

## Clients

+ Add client

 Search

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X

## Add a client

Click the “Add Client” button in the top right corner to add your first client to your list.



Your List



Presentation



Products

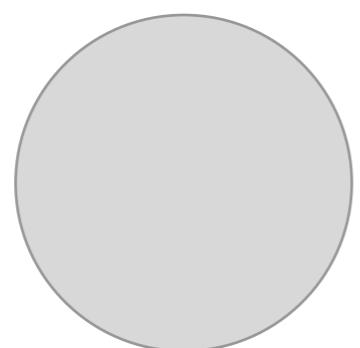
## Clients

+ Add client

Cancel

## New Client

Done



First Name

Bill

Last Name

Watson

Practice Name

Sorenson Family Dental

Phone

801-231-4421

Email

bill@sfdental.com

Address

335 Main Street

Zip

84112

Initial Contact

10/13/17

Notes

Bill is the office manager of SFD. He works at his office Monday through Thursday between 8:00 and 6:00. Best to reach him by text. Loves Utah State football.

Save Contact

Start Presentation

X

Fill in their information and click "Start Presentation" to walk them through your sales pitch.

## Clients

+ Add client

Search

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Bill Watson

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First Name \*

Bill

Last Name \*

Watson

Practice Name \*

Sorenson Family Dental

Initial Contact

10/13/17

Email \*

you@yourpractice.com

Phone \*

555-555-5555

Address \*

555 Main Street

Zip \*

11111

Notes

Type any information you might need in the future

Save Contact

Start Presentation

## Calculator

Client's Name



## Your Budget

Brand Definition

Foundation Options

Internal Marketing

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Marketing to Suburban

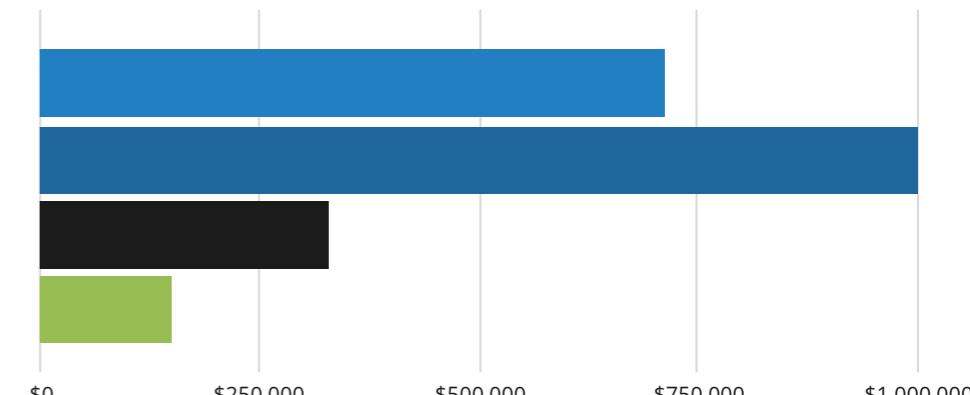
Summary + Confirmation

Next Steps

## Growth Goal

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## 12 Month ROI Estimate



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## Monthly Budget

&lt;\$2,499

\$2,500 - \$3,499

\$3,500 - \$4,999

\$5,000 +

## Typical annual rate of return

150-300%

200-400%

250-500%

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## 5 Year ROI Estimates

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Clients



Presentation



Products

## Calculator

Client's Name



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## Marketing to Suburban

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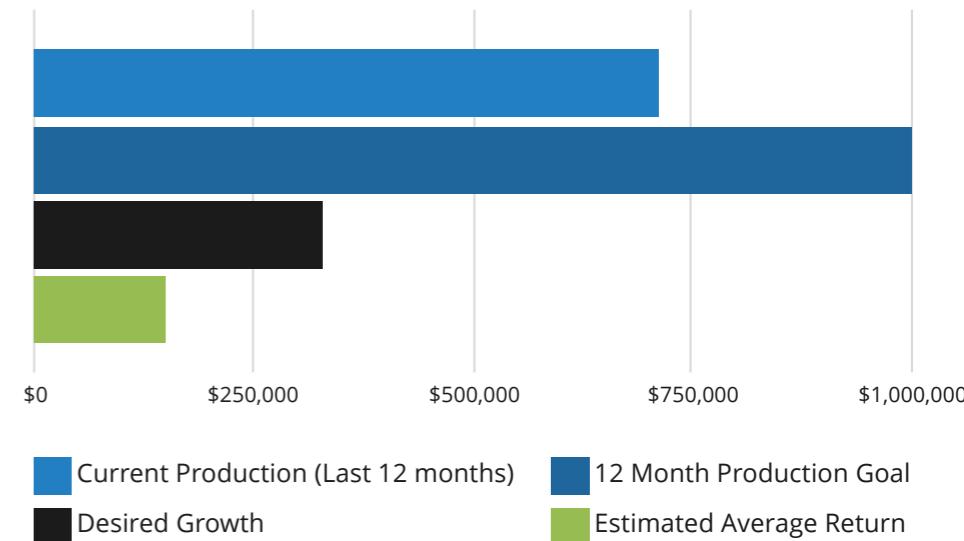
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Client's Name Calculator

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## Marketing to Suburban

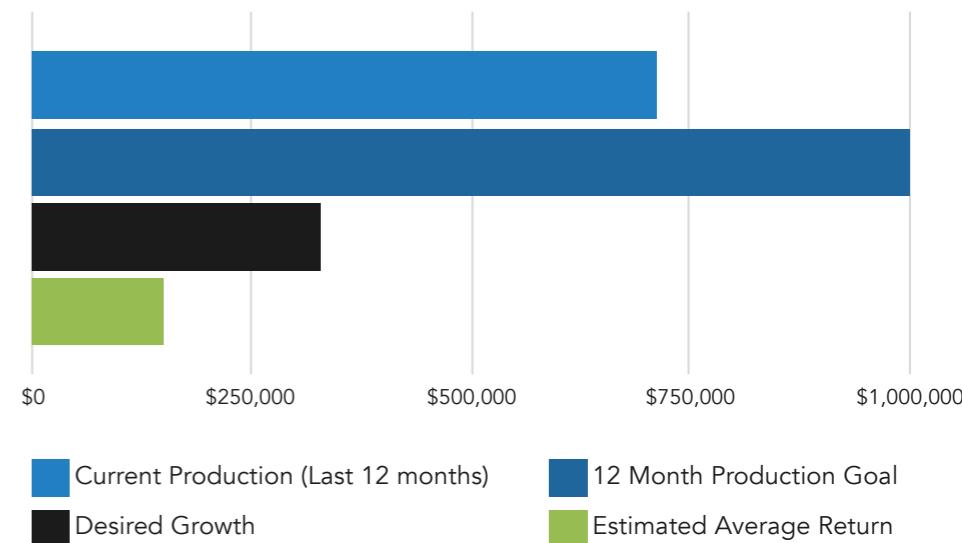
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# Calculator

Client's Name



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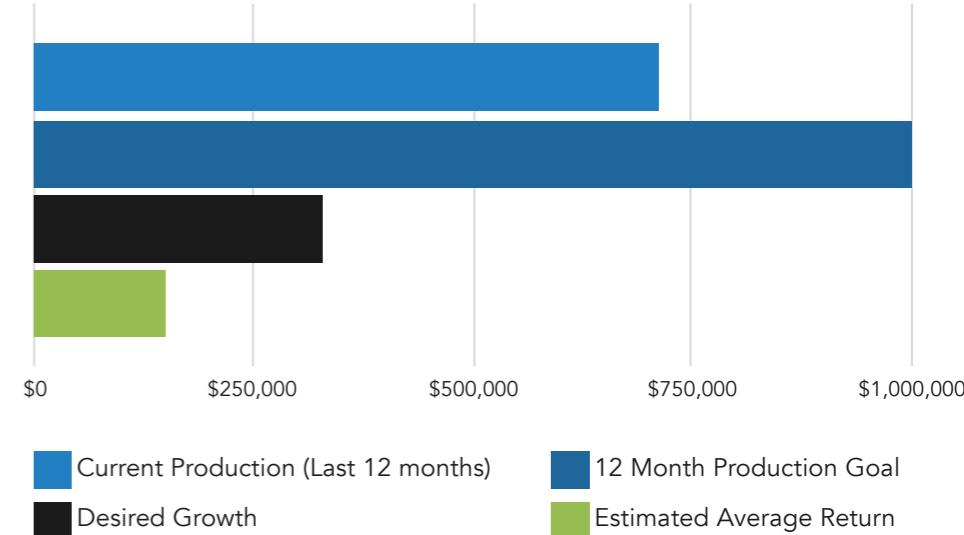
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# Calculator

Client's Name 

## Calculator

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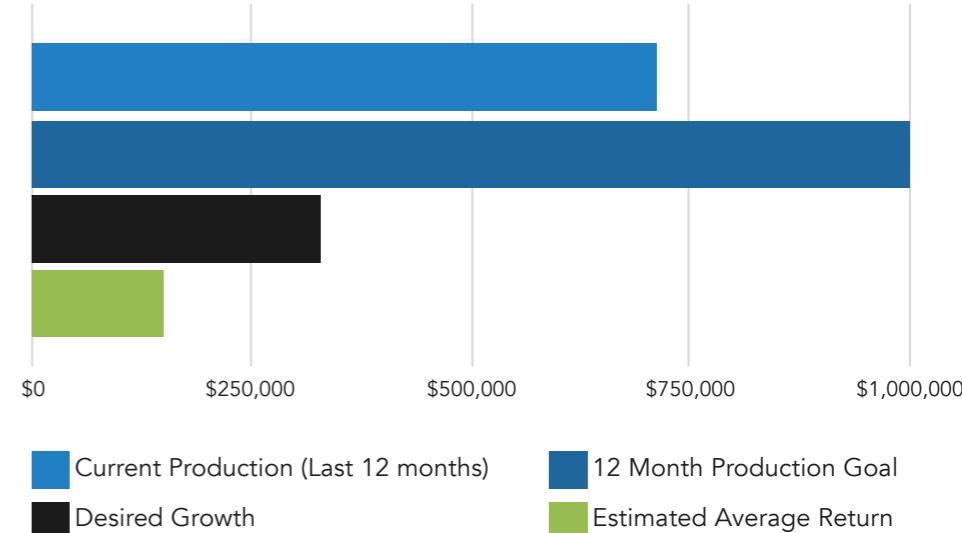
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# Calculator

Client's Name [Next](#)

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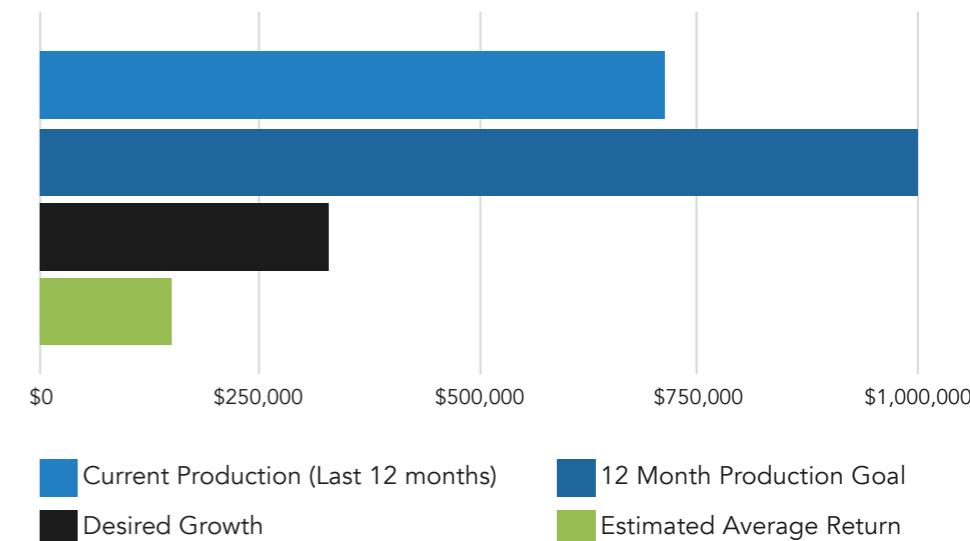
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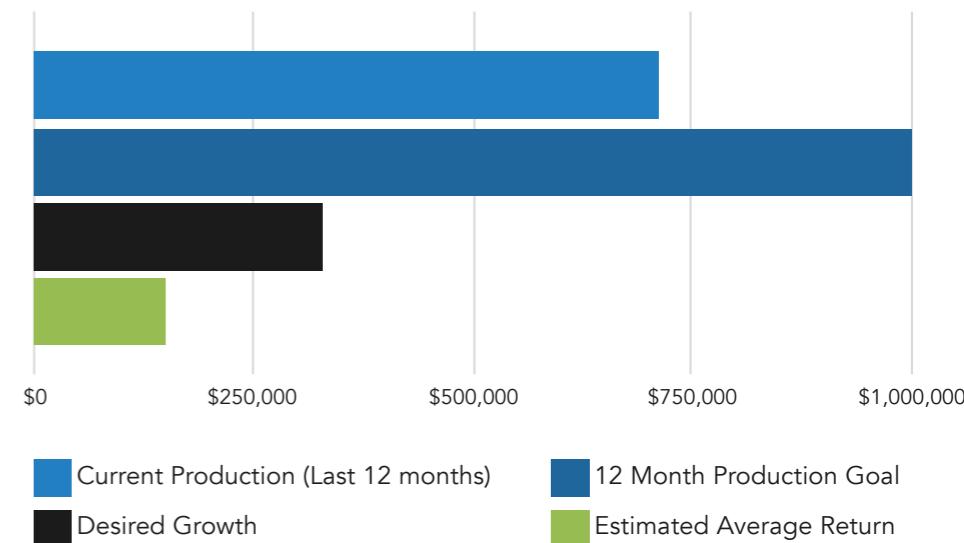
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\$2,500 - \$3,499

\$3,500 - \$4,999

**\$5,000 +**

#### Typical annual rate of return

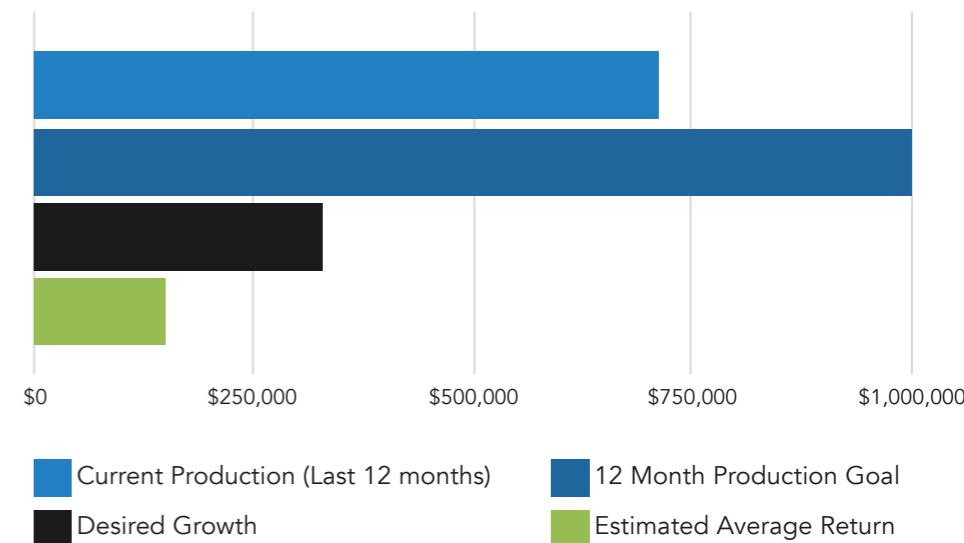
150-300%

200-400%

250-500%

**300-600%**

#### 12 Month ROI Estimate



#### 5 Year ROI Estimates

Year 1	\$75,000
Year 2	\$150,000
Year 3	\$200,000
Year 4	\$230,203
Year 5	\$250,000

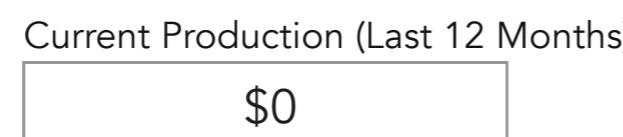
[Previous](#)Client's Name [Next](#)

## Growth Calculator

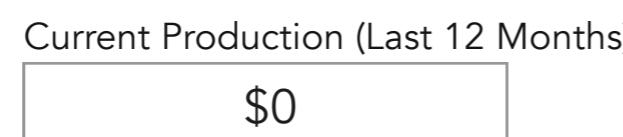
Brand Definition



Foundation Options



Internal Marketing



External Marketing

Marketing to Suburban

Summary + Confirmation

Next Steps



Client



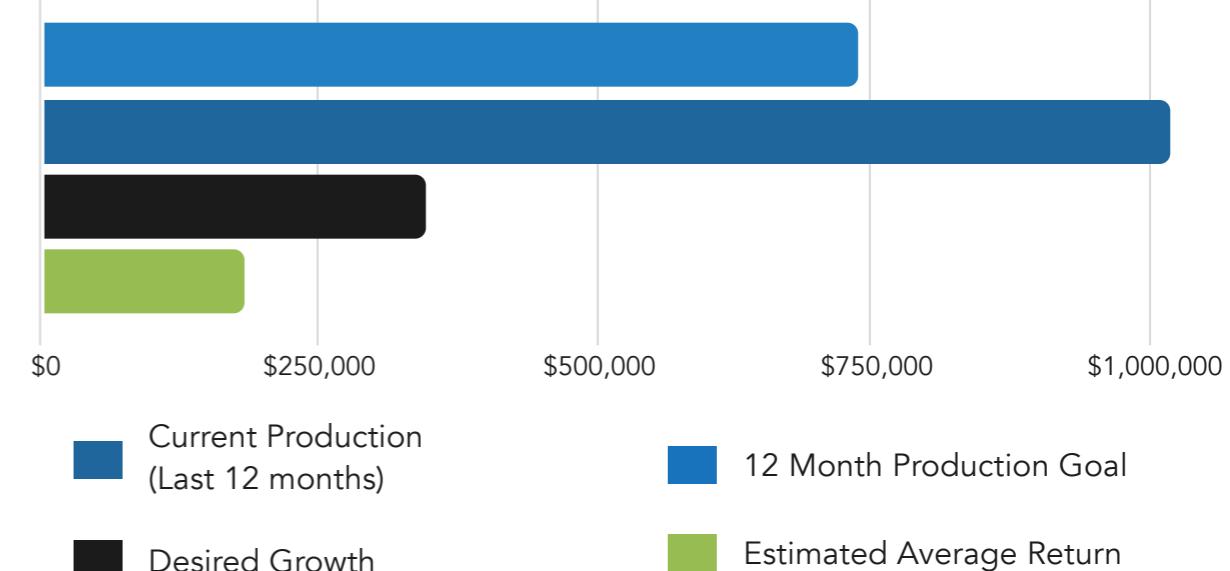
Presentation



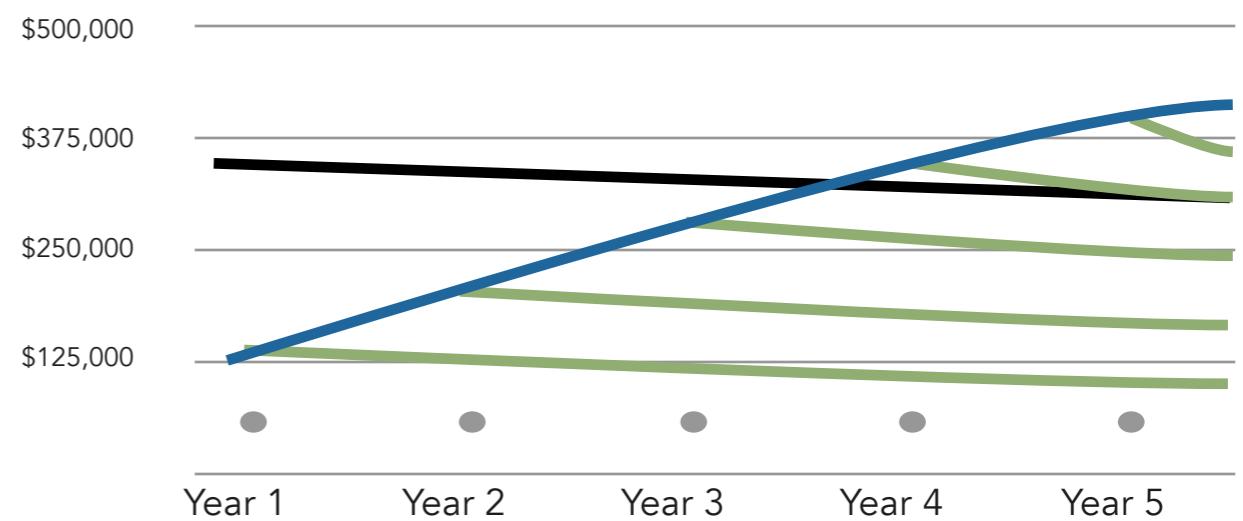
Products

## Growth Goal

## 12 Month ROI Estimate



## 5 Year ROI Estimates





# Strategic Marketing Planner

## START



## Clients

+ Add client

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## Welcome to the Strategic Marketing Planner

To get started, add a client to your list using the button in the top right corner.



Client



Presentation



Products

## Clients

+ Add client

Cancel

## New Client

Done

Bill Watson

First Name \*

Bill



Last Name \*

Watson

Practice Name \*

Sorenson Family Dental

Phone \*

801-231-4421

Email \*

bill@sfdental.com

Address \*

3342 S 2311 E

City

Orem

State

UT

Zip \*

11111

Initial Contact

10/13/17

Notes

**Save Client****Start Presentation**

## Clients

+ Add client

Cancel

Client

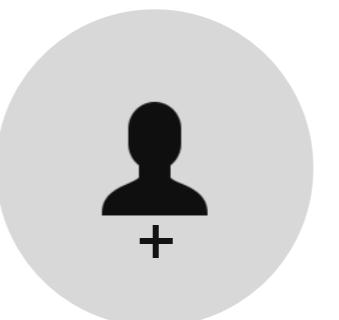
Done

A

Bill Watson

First Name \*

Bill



Last Name \*

Watson

Practice Name \*

Sorenson Family Dental

Phone \*

801-231-4421

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bill@sfdental.com

Address \*

3342 S 2311 E

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11111

Initial Contact

10/13/17

Notes

Delete Client

Start Presentation

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## Growth Calculator

### Brand Definition

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### External Marketing

### Marketing to Suburban

### Summary + Confirmation

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## Growth Goal

Current Production (Last 12 Months) \$0

12 Month Production Goal \$0

Desired Growth \$0

## Estimated Budget Returns

Monthly Marketing Budget \$0

## Estimated Budget Returns

Annual Marketing Budget \$0

Estimated Low-End Return \$0

Estimated High-End Return \$0

Estimated Average Return \$0

Estimated Growth Percentage \$0

### Monthly Budget

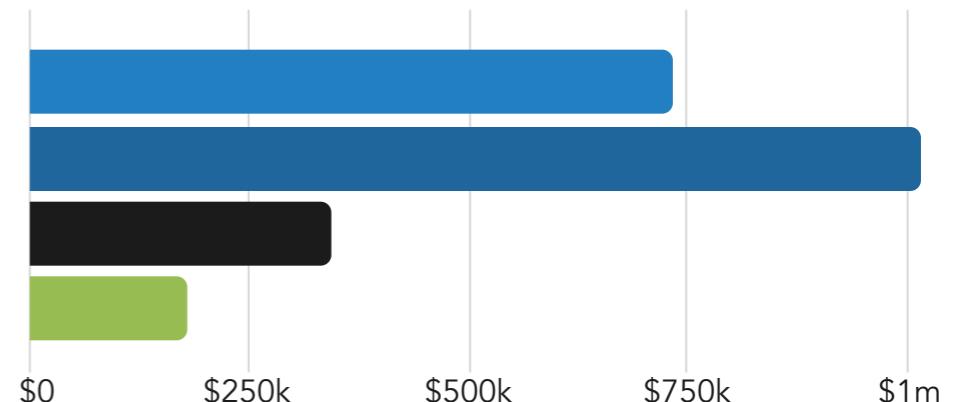
&lt;\$2,499 Typical annual rate of return 150-300%

\$2,500 - \$3,499 200-400%

\$3,500 - \$4,999 250-500%

\$5,000 + 300-600%

## 12 Month ROI Estimate



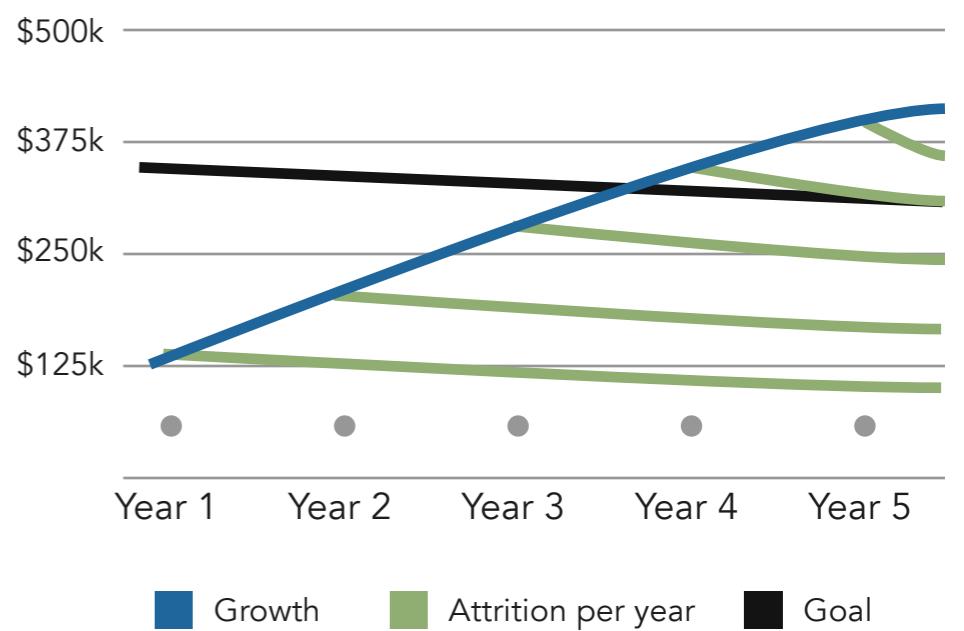
Current Production  
(Last 12 months)

12 Month Production Goal

Desired Growth

Estimated Average Return

## 5 Year ROI Estimates



Growth

Attrition per year

Goal



Client



Presentation



Products

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## Brand Definition

\$0/\$5,000

[Brand Definition](#)

The quality and quantity of your patient base will always be a direct result of the perceptions you create through your messaging. Your Dental Branding Marketing Strategist will work with you to develop a powerful message that is custom to you and differentiates you from your competition.

[Internal Marketing](#)

What's included in the Brand Definition?

[External Marketing](#)

### Vision & Values

- A vision statement
- Defined core values
- An explanation of how to incorporate the vision & values
- Exercises to integrate your vision & values with your team

[Marketing to Suburban](#)

### Differentiation

- Your tag line
- Your headline
- Your key benefit bullet points
- An explanation of how to incorporate your differentiation

[Summary + Confirmation](#)

### Competitive Analysis

- An Analyzation of six competitor's websites
- An explanation of how to analyze your competitor's messaging to ensure differentiation

[Next Steps](#)

### Trust Building

- Defined key benefit bullet points
- An explanation of how to use this foundation for messaging

### Your Audience

- Demographics by population, households, income, ethnicities & median age
- An explanation of how we use the demographics



Client



Presentation



Products

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## Foundation Options

\$0/\$5,000

Foundational items enhance all your marketing efforts and ensure increased effectiveness.

Custom Logo 

---

Responsive Website 

---

12 Months of Hosting 

---

Video and Photography 



Client



Presentation



Products



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## Internal Marketing

\$0/\$5,000

You should think of your external marketing as a feeder for your internal marketing. If your internal marketing systems aren't functioning efficiently, you're wasting opportunity and not maximizing your growth and profitability.

Our internal systems include employee marketing training, internal marketing tools, accountability and ongoing measurements. They focus on building habits that become part of your daily tasks.

Select the internal systems that are right for your needs:

 Referral System  Ancillary Services System  Case Acceptance System  Reactivation System  Smile Savings System 

Client



Presentation



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## External Marketing

\$0/\$5,000

Select your external marketing mix.



Urban

A digital marketing focus. Ideal for highly populated areas.



Suburban

A mix of digital and traditional marketing to maximize results in a suburban demographic.



Rural

A traditional marketing focus ideal for rural areas.

Or choose by area of focus.



Digital Marketing



Traditional Marketing



Mix of Digital and Traditional



Client



Presentation



Products

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## Marketing to Suburban

\$0/\$5,000

Move the slider to select an external marketing budget amount for Suburban/Mix of Digital & Traditional marketing. Below are the available monthly payments amounts for a 12 month term.

**\$0 per month**



Marketing to Suburban

Summary + Confirmation

Next Steps



Client



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## Summary & Confirmation

\$0/\$5,000

Thank you for starting a partnership with Dental Branding. We are thrilled to be working with you. Based on our information, you recently talked with Blake about your marketing plan. This is the information we have based on your conversation.

Budget: \$5,000 per month

Custom Designed Logo

Responsive Website

Custom Photography and Video

Split to Urban and Suburban

Referral service

Smile Savings System

Total cost

[Send Confirmation](#)

Client



Presentation



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Client's Name

[Finish](#)[Growth Calculator](#)

\$0/\$5,000

[Brand Definition](#)[Foundation Options](#)[Internal Marketing](#)[External Marketing](#)[Marketing to Suburban](#)[Summary + Confirmation](#)[Next Steps](#)

# Congratulations!

We are so excited to start working on your marketing plan. Here is what you can expect to happen within the next 48 hours.

## Orientation Call

To kick everything off we will schedule an orientation call. The purpose of the call is to align expectations, present your timeline and introduce you to your marketing team.

## Timeline

Your Dental Branding Marketing Strategist will work with you to establish an ideal timeline for the completion of your custom marketing plan. Everything will be implemented according to the defined timeline.



Client



Presentation



Products

## Clients

+ Add client

 Search

A

Bill Watson

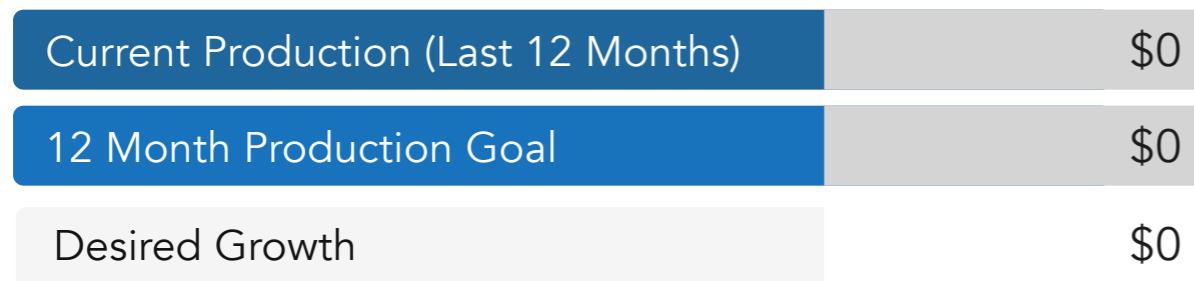
+801-231-4421

bill@dentalpractice.com

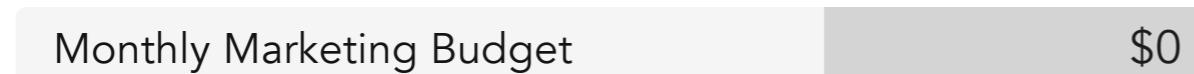
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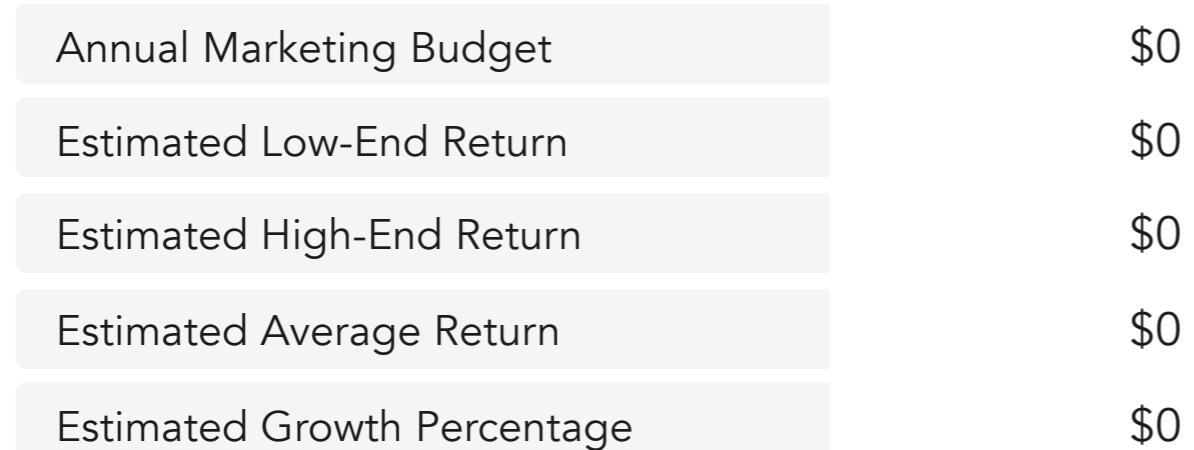
## Growth Goal



## Estimated Budget Returns

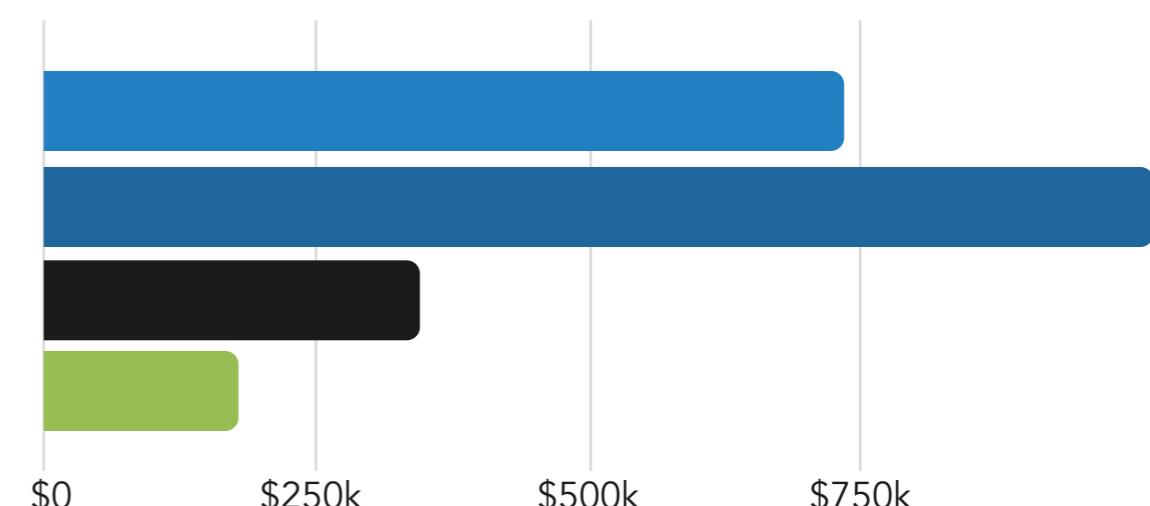


## Estimated Budget Returns

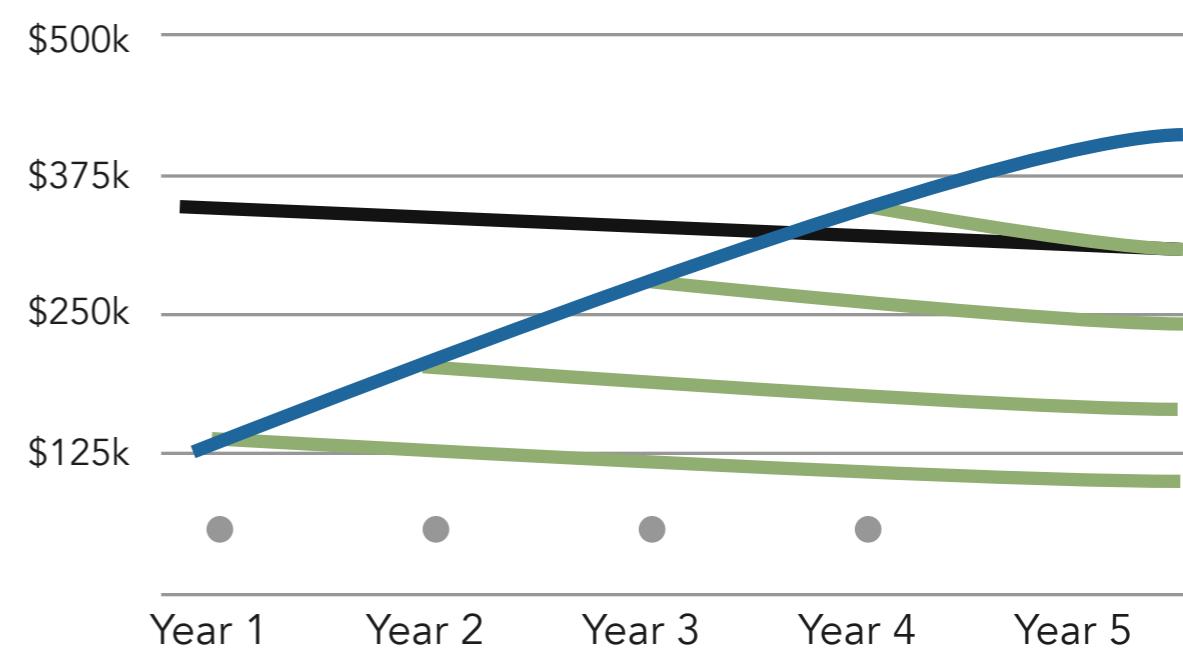


Monthly Budget	Typical annual rate of return
<\$2,499	150-300%
\$2,500 - \$3,499	200-400%
\$3,500 - \$4,999	250-500%
\$5,000 +	300-600%

## 12 Month ROI Estimate



## 5 Year ROI Estimates



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12 Month Production Goal \$0

Desired Growth \$0

## Estimated Budget Returns

Monthly Marketing Budget \$0

## Estimated Budget Returns

Annual Marketing Budget \$0

Estimated Low-End Return \$0

Estimated High-End Return \$0

Estimated Average Return \$0

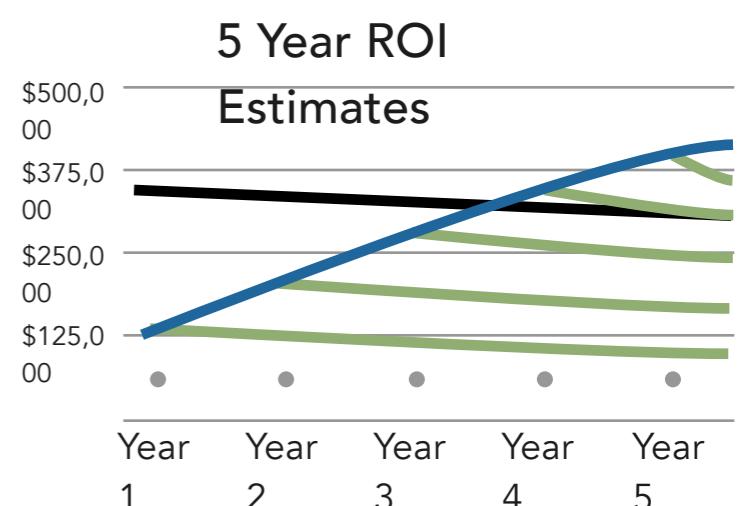
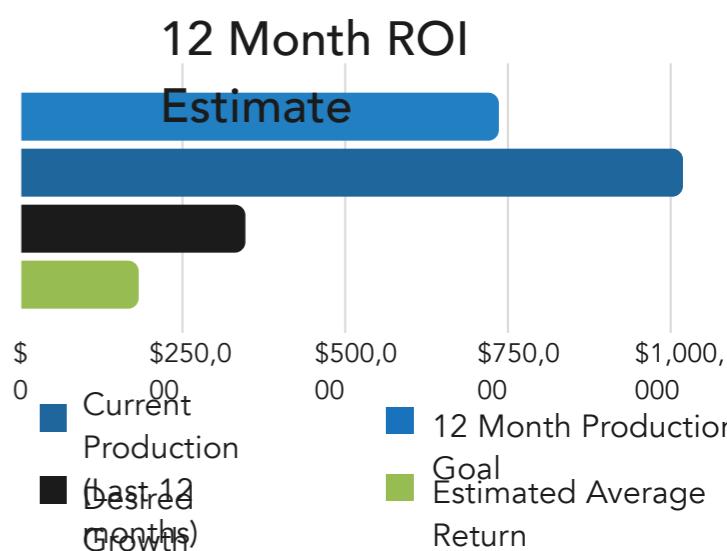
Estimated Growth Percentage \$0

## Monthly Budget      Typical annual rate of return

&lt;\$2,499 150-300%

\$2,500 - \$3,499 200-400%

\$3,500 - \$4,999 250-500%

**\$5,000 + 300-600%**

Client



Presentation



Products

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Current Production (Last 12 months)

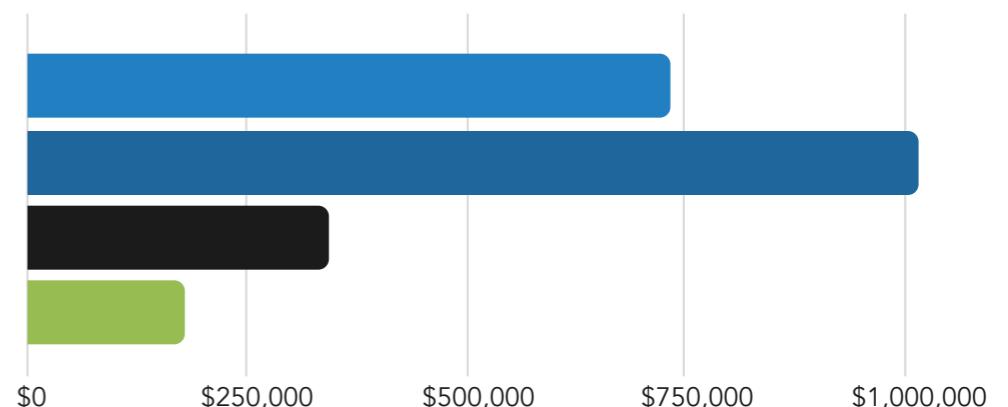
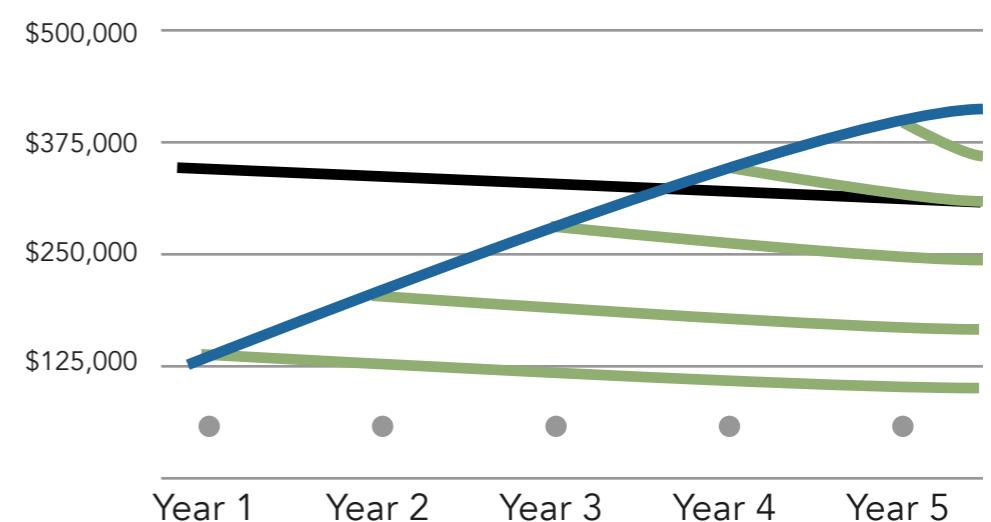
\$0

12 Month Growth Goal

\$0

Monthly Marketing Budget

\$0

**Brand Definition****Foundation Options****Internal Marketing****External Marketing****Marketing to Suburban****Summary + Confirmation****Next Steps****12 Month ROI Estimate**█ Current Production (Last 12 months)█ 12 Month Production Goal█ Desired Growth█ Estimated Average Return**5 Year ROI Estimates**

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## Growth Goal

Current Production (Last 12 months)

\$0

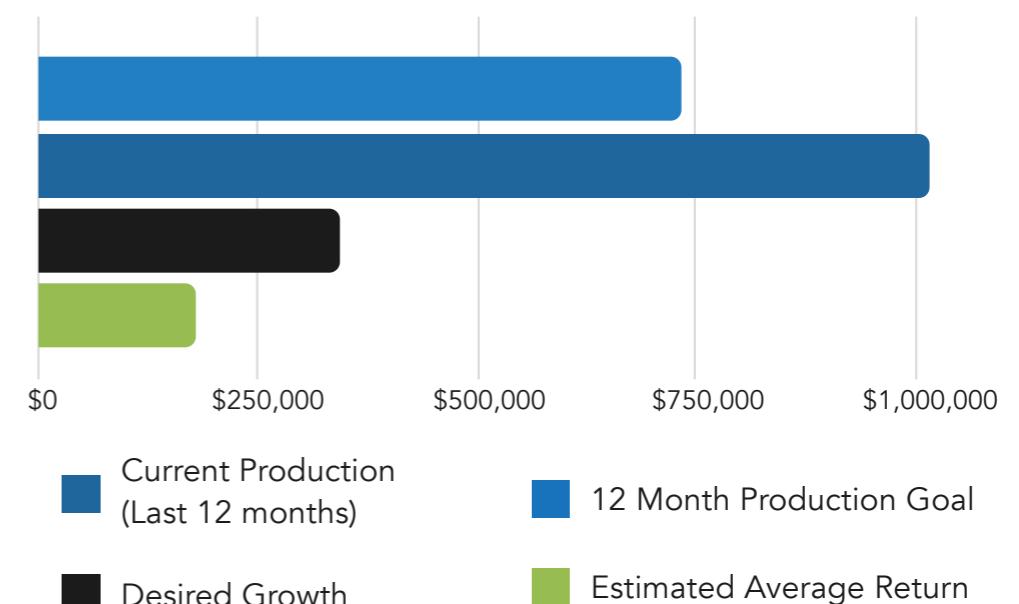
12 Month Growth Goal

\$0

Monthly Marketing Budget

\$0

## 12 Month ROI Estimate



## 5 Year ROI Estimates

