

How to Marketing Schedule

New Year 20/20 and Back to School Campaigns – January to March

After marketing heavily in the last quarter of 2019, we know most practices will want to direct their marketing to a different segment of their database in the first quarter of 2020. If this sounds like your practice, here are our recommendations for your key targets for New Year marketing:

- **Health Fund patients who weren't included in your EOYHF marketing** because they had purchased already in 2019 before you began marketing (e.g. patients with a health fund who purchased from Jan-Aug 2019)
- **Non-Health Fund patients** because these patients are likely not to have been marketed to directly for a period of time. Include a special offer to incentivise this group – remember, you can take advantage of Supplier Partner offers continuing into the New Year (refer to the last page).
- **Health Fund contact lens patients** are likely to purchase from you more frequently, so a gentle reminder their health fund extras have reset will be helpful, even if you included them in your EOYHF marketing.
- **If you offered a Gift Voucher to EOYHF patients to use in the New Year**, remind these patients to use their gift with an SMS.
- **Families with children under 13** who are due or overdue for an eye exam or who may be interested in taking part in the CooperVision Draw to Win Competition.

Leverage this 'How to Marketing' Schedule, direct marketing products in ProMarket and new patient marketing assets in the New Patient Marketing Kit (DropBox) which can be accessed via optom.provision.com.au (search for **New Year or Back to School 2020**).

January – Active and Lapsed Patients			
WHEN & WHY	WHAT	TIP	STATUS
First 2 weeks of January – strengthen loyalty to your practice by educating patient base on relevant eye care topics. TIP - Consider all targeting options below and run your lists for these first, so you can remove anyone on these lists from the newsletter send out. Contact ProVision marketing if you need help removing duplicates.	Direct Mail Newsletter - Print \$1.86	Send a hard copy 4-page newsletter discussing 2020 – the year of good vision for life, summer eye care tips, back to work, glaucoma and/or CooperVision's Draw to Win Competition. This is not a hard-sell communication, instead, it is designed to educate patients and increase loyalty.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	Newsletter – Pack of 50 \$34.45	Order hard copy newsletters for the practice - hand out to customers, local groups or schools or include in recalls.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	Newsletter - Email Free	Expand your reach and send an email newsletter as a follow up to your hard copy newsletter and add the rest of your database. Order at the same time as your print newsletters, and schedule to arrive 2 weeks after your print newsletter OR If you're not printing the newsletter, schedule the email newsletter to be sent towards the end of the second week of January.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
Back To School			
First 2 weeks January – drive young patients who are due/overdue for an eye exam back in practice to prepare for a new school year.	BTS 2020 Recall / Lapsed Letter \$1.48	Choose a combination of Recall/Lapsed Letter, SMS and/or Email to remind parents of children due or overdue for an eye exam of the critical importance of regular eye examinations for their children's development and learning.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE

WHEN & WHY	WHAT	TIP	STATUS
Continued from the previous page	SMS \$0.17 OR Email Free	Schedule the SMS or Email reminder 1 week after the print materials are due to arrive in the post.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	Social Posting	Use the New Patient Marketing DropBox suggested posts featuring Adele & her son Harvey (and/or develop your own post) to promote putting a children's eye test on parents' back to school checklist. Boost this content to Gen X & Y Mums in your local area to stimulate appointments and practice awareness.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
First 2 weeks January – CooperVision /Stuck on You Draw to Win Competition – engage in a fun way with families with children aged under 13 years.	Email Free	Email families of under 13's on your database to promote the Draw to Win competition – at the same time, you'll be helping to promote children's vision and eye health including the rise in childhood myopia. (You will have needed to register for this during the campaign registration period).	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	Social Media Posting	Use the New Patient Marketing DropBox suggested post featuring Adele & her son Harvey (and/or develop your own post) to promote the competition to your social followers. Boost this content to Gen X & Y Mums in your local area to stimulate appointments and practice awareness.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
New Year 20/20 – Health Fund Patients			
First 2 weeks January – drive adult and child patients back in practice to leverage a New Year of optical extras. Tip - if you want to avoid EOYHF target patients, concentrate on those who purchased from Jan – Aug in 2019.	NY20 Optical Extras – Letter \$1.48 / Email Free / SMS \$0.17	Choose a combination of Letter, SMS and/or Email to remind adult patients to take advantage of their new year of optical extras. If you send print, schedule the SMS or Email reminder 2 weeks after the print materials will arrive.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	BTS20 Optical Extras – Letter \$1.48 / Email Free / SMS \$0.17	Choose a combination of Letter, SMS and/or Email to remind families of patients to take advantage of their new year of optical extras. If you send print, schedule the SMS or Email reminder 2 weeks after the print materials will arrive.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	NY20 Contact Lens Reminder – SMS \$0.17	Remind your contact lens patients about their new year of optical extras. SMS has the best results when sent on Mon, Tues or Wed between 10:00 am or 11:00 am	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	Social Media Posting	Use the New Patient Marketing DropBox suggested posts/videos promote the New Year Health Fund message to your followers. Boost locally, targeting females in your desired age range (may be broader than Gen X based on your clientele).	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
First 2 weeks Jan – drive Gift Voucher redemption if you promoted this offer in EOYHF 19 marketing.	Gift Voucher Reminder – SMS \$0.17	If you offered a Gift Voucher to use in 2020 as part of EOYHF marketing, send a reminder to patients who took it up.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
New Year 20/20 – Non-Health Fund Patients			
The first 2 weeks Jan – engage with non-health fund patients with a product offer to bring forward their repurchase cycle.	NY20 Non-Health Fund – Letter \$1.48 / Email Free / SMS \$0.17	Choose a combination of Letter, SMS and/or Email to remind adult patients to take advantage of your special offer. If you send print, schedule the SMS or Email reminder 2 weeks after the print materials will arrive.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE

FEBRUARY TO MARCH

February to March – Attract New Patients

Communicate the Back To School message to Gen X & Y Mums in your local area, aged between 35 – 53. Target New Year Health Fund messaging to the age range that is reflective of your demographic, extending to Baby Boomers.

WHEN & WHY	WHAT	TIP	STATUS
Prepare in January to run in February – get your message in front of new prospective patients	Advertising - Back to School or New Year Health Fund Message	Think about your ideal local patient - where do they spend their time? <ul style="list-style-type: none"> - Facebook - Reading local publications - Listening to local radio - At local sporting or community clubs Visit the New Patient DropBox https://dl.orangedox.com/nybts2020 Place advertising where your ideal patient spends their time leveraging the imagery and wording around the campaign to drive new patients	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	Facebook advertising or post boosting	Use the campaign DropBox and/or the ProVision private group to create posts that communicate your passion for back to school or a fresh start to the new year. Make sure to put money behind and boost these posts to the ideal local patient.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
	A3 Branded Posters – 5 Pack \$8.10 ex GST	Deliver A3 Branded Posters to local health practitioners and community groups to be placed on notice boards to promote your campaign message out to the local community.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE
Throughout February and March where appropriate – we need to see messaging 7-8 times to take notice!	Facebook (continue)	Continue to Boost 2-3 posts per month related to Back To School and/or New Year Health Fund.	<input type="checkbox"/> TO DO <input type="checkbox"/> DONE

Marketing Lists

Use the guide below to export each targeted campaign list from SUNIX or Optomate to upload into ProMarket.

NEWSLETTER PRINT & EMAIL DISTRIBUTION

We recommend targeting 250+ patients with a hard copy newsletter:

- Been to the practice in the last 3 years (1/1/2017 – 1/1/2020)
- Remove patients who will be recalled in the next 3 months (1/1/2020 – 1/3/2020)
- Need to refine further? Focus on top spender and/or include patients aged 38 - 53 years old (1/1/1967 – 1/1/1982)

We recommend sending an email newsletter to your full export:

- Been to the practice in the last 5 years (1/1/2015 – 1/1/2020)

BACK TO SCHOOL – RECALL DUE OR LAPSED PATIENTS

Please note all ProMarket products for back to school have been created so you can export a list of children's names and it is addressed to the family.

Active patients aged between 5 – 13 years old:

- Use this as your children's recall template between January - March

Lapsed patients aged between 5 – 13 years old who you have not seen in the last 3 – 6 years:

- Been to the practice 3 – 6 years ago (1/1/2014 – 1/1/2020)
- Include patients aged 5 – 13 years (born 1/1/2006 – 1/1/2014)

NEW YEAR HEALTH FUND (OPTICAL EXTRAS) – REMIND ADULTS & FAMILIES OF CHILD PATIENTS

Active spectacle and contact lens patients aged 18 and over:

- Been to the practice in the last 3 years (1/1/2017 – 1/1/2020) OR Refine to avoid marketing to the same patients you targeted for EOYHF by focusing on health fund patients who purchased with you in 2019 before you started your EOYHF marketing (e.g. 1/1/2019 – 31/8/2019)
- The calendar Year Health Fund
- Spectacle and/or contact lens wearers (with prescription)
- Remove patients who will be recalled in the next 6 months (1/1/2019 – 1/6/2019)

Active spectacle and contact lens patients aged between 5 – 13 years old:

- Been to the practice in the last 3 years (1/1/2017 – 1/1/2020)
- Spectacle and/or contact lens wearers (with prescription)
- Include patients aged 5-13 years (born 1/1/2006 – 1/1/2014)
- Remove patients who have made a purchase between 1/7/2019 – now
- Remove patients who will be recalled in the next 6 months (1/1/2020 – 1/6/2020)

NEW YEAR (NO HEALTH FUND) – OFFER TO ADULTS

Active spectacle and contact lens patients aged 18 and over:

- Been to the practice in the last 3 years (1/1/2017 – 1/1/2020)
- Does not have a Health Fund
- Spectacle and/or contact lens wearers (with prescription)
- Remove patients who will be recalled in the next 6 months (1/1/2020 – 1/6/2020)

Supplier Partner Offers

CR SURFACING PROMOTION - 1 OCT 2019 – 31 JAN 2020

Leverage the CR Surfacing 50% OFF 2nd pair promotion in your New Year Health Fund marketing. **Use any New Year Health Fund or Non-Health Fund Standard Letters or Emails and select the \$/% off Second Pair Offer or Custom Offer to promote your patient offer.**

Terms: Receive 50% off on the 2nd pair of lenses of equal or lesser value to the first pair ordered (excluding fitting or freight) when two or more pairs of lenses are purchased from CR Surfacing Laboratories for the same patient. To claim the offer, the 2nd pair must be ordered with the 1st pair and be submitted on the promotional A4 form or electronic order form. To source form please contact CR surfacing on info@crsurfacing.com.au

HOYA PROMOTION - 1 OCT 2019 – 31 JAN 2020

Leverage the HOYA 50% OFF 2nd pair promotion (up to 60 days after the purchase of the 1st pair) in your New Year Health Fund marketing. **Use any New Year Health Fund or Non-Health Fund Standard Letters or Emails and select the \$/% off Second Pair Offer or Custom Offer to promote your patient offer.**

Terms: 50% off discount will be applied to the product with lesser value. First orders must be placed within the promotion period (1 Oct 2019 – 31 Jan 2020). Second pairs must be placed within 60 days of the first complete pair. The same patient reference must be used for both orders. 50% credit will be calculated based on your ProVision discounted price list. Not available on Hoya Safety products. Accounts must be within trading terms. Not in conjunction with other offers. 50% off discount applied to the total invoice price. Refer to Hoya Credit & Warranty Policy for more information. Credit form to be lodged monthly. Failure may void 2nd pair credit.

ESSILOR/OSA 2ND PAIR PROMOTION - 1 OCT 2019 – 29 FEB 2020

Leverage the Essilor/OSA 50% OFF 2nd pair promotion in New Year Health Fund marketing. **Use any New Year Health Fund or Non-Health Fund Standard Letters or Emails and select the \$/% off Second Pair Offer or Custom Offer to promote your patient offer.**

Terms: Receive 50% off of the least expensive pair(s) of lenses (excluding fitting or freight) when two or more pairs are purchased from your Essilor or OSA lab, for the same patient on the same day, or, 25% off when ordered on subsequent days before the end of the promotion date.

Valid: 1st October 2019 to 29 February 2020. Code: Use VA code 2NDPR on your second order.

RODENSTOCK PROMOTION - 1 OCT 2019 – 31 JAN 2020

Offer patients FREE POLARISING on their second pair from 1 Oct 2019 to 31 Jan 2020. Rodenstock will credit \$40 for each second pair with polarising (same patient, same script within 14 days). Process: practice to keep a sales record and submit credit to Rodenstock. Offer is not applicable in conjunction with sunglass packages. Contact your Rodenstock Sales Representative for more information. **Use any New Year Health Fund or Non-Health Fund Standard Letters or Emails and select the Custom Offer option to promote your patient offer.**

Offer headline suggestion: Free Polarising on Your Second Pair T&C's suggestion: Receive free polarising valued at \$XXX on your second pair of glasses when you spend \$XXX or more on the initial pair. Must be in the same prescription and ordered at the same time or within 14 days of your first pair. Offer valid until XX/XX/XX.

B&L PROMOTION – 27 JAN 2020 – 30 APRIL 2020 (NEW)

Offer a \$50 gift card from Bausch & Lomb to patients who purchase a 6 months' supply of Biotrue ONEday lenses and submit their proof of purchase online. Bausch & Lomb will provide you with tear-off pads, screen reminders, social media tiles, digital banners and digital posters in time for the 27 January commencement. Please contact your Bausch & Lomb Territory Manager for more information from mid-January. Look out for an SMS and email template in ProMarket in late January.

To access ProMarket, the New Patient DropBox or ask advice from the ProVision Marketing team, please visit optom.provision.com.au and contact us via Live Chat.