Campaign
Planning & Management

A guide to setting up your marketing campaign for **success**

This guide will cover:

- Planning & Marketing
- Reporting & Measures
- Team & Patient Involvement
- System Reporting

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Campaign
Planning & Management

Part 1

Introduction

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Campaign Planning & Management

Part 1 – Introduction

Setting up your campaign for success

Campaigns take work! There is a lot of planning involved, and a lot of components to manage.

In order to truly understand what return you achieved for your marketing efforts, i.e. how *successful* your campaign, you need to plan and review so that you can use this information to do better next time.

We have put this guide together to help you to do just that: make the most of each campaign you run in your practice *and* engage your team in the process.

Campaign Planning & Management

Part 2

Planning & Marketing

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Campaign Planning & Management

Part 2 – Planning & Marketing

Marketing

History shows those that have a detailed marketing plan that is well executed, returns greater results.

One of Tom Bowen's (Williams Group) marketing rules is "Tell them what you know". Simple but effective! Clear, consistent messages on your campaign offers through various platforms will help generate a great result.

Checklist

To help you plan and work through the steps we have put together a checklist to use with each campaign. [Download the checklist here.]()

The timeline is automated once you add in a start date. The campaign name should be adjusted to match the campaign you are working on. Pictured below is a preview only.

Campaign	EOYHF	Start Date		1/10/2020	End Date	31/12/2020	
Comments	Actions	Est Cost	Lead Time (Wks.)	Target Start date for task	Owner of Task	Progress Comments	Completed
Register for Campaign	ProVision Marketing will contact members via email inviting them to register for the campaign. Usually 4 6 weeks before the campaign start date.						
Campaign File	Set up Campaign File for all campaign communications/reports/marketing for easy reference. It is recommend the file not be stored on your computer as this will allow every team member quick easy access to the campaign information		3	10/09/2020			
Nominate a Campaign Champion	Appointing a Campaign Champion has many benefits in running a successful campaign. While it is not their role "to do everything" a champion will ensure tasks are delegated to the right person and your plan will remain on track and well executed		3	10/09/2020			

Campaign File

Preparation is a key driver to ensuring the campaign you have heavily invested in generates a good return on your investment.

We strongly recommend you create a "campaign file". The file should contain all information relevant to the campaign.

- Campaign set up checklist
- ProVision campaign briefs
- Details of events and timing
- KPI reports to track performance
- Sales targets
- Recall Plan
- Team Meeting Minutes
- Marketing Plan

Setting up the file will enable everyone to find all information relevant to the campaign.

Events

Outside the main theme of the campaign there are many opportunities to generate additional patients and contribute to the campaign's overall success; namely by offering events or offers.

Events or offers should add value to the patient experience while also contributing to additional income for the practice.

Consider 2 or 3 other offers that are easy to understand and will generate interest.

- Discount on a 2nd Pair
- Free Readers (clear aged stock)
- Rx Sunglass offer as a 2nd pair
- Additional coating
- Transitions Lenses
- Buy 2 pairs, save XX%
- Offer to be used in the New Year
- Contact Lenses - Trial

Whatever you decide, try to limit the duration that the offers are available, e.g. 2-3 weeks. This will allow you to change and refresh on a regular basis and to engage a different patient with a different offer.

In-Store Marketing

A big key to success is letting your patients know what your offer is. While you will organise to send letters, postcards and offers direct to patients, you can also introduce your offer to your patients in-store.

During your first meeting you should discuss the best ways to talk about your offer, and how to introduce it into a conversation.

- **Example 1** - Someone has come into your practice to ask about an eye examination during your EOYHF campaign (new patient to you). While discussing how appointments work you can also ask if they have a health fund that covers optical and let them know that it's a great time to organise their eye test so that they can take advantage of their rebate for this year.

- **Example 2** – One of your existing patients (who purchased a pair of multifocal lenses earlier that year) has come in to have their sunglasses tightened. While doing the adjustment you can chat about updating their sunglasses in the new year when their rebate begins again and show them some options that you can put away.

We have included more examples in the **Team & Patient Involvement** section.

EOYHF – Second Pair Claiming

One of the opportunities that the EOYHF campaign presents is to discuss a second pair that can be claimed in the New Year in order to take advantage of rebates across 2 years.

This helps the patient use their rebate *and* get a second pair, but it also helps the practice start the year well and not leave the second pair to chance.

To manage this process well, we recommend discussing the following health fund and in-store considerations at your team meeting:

- Designate an area in your lab/storage/staff room for jobs to be ordered in the New Year
- Use your carry bags to place the frame/sunglass and relevant information in
- If you choose to add the frame or sunglass to their file, it may be sold when you go to complete the order in the New Year
- Put someone in charge of processing the jobs in the New Year
- Have a process for contacting the patient and organising deposits/payments
- Understand the health fund rules that may have an impact

No Gap & Affordability

For some campaigns you may wish to introduce a No Gap or package offer that is relevant to your practice and your offer.

We have developed a **No Gap & Affordability Programme** that takes you through exactly how to do this, step by step. You can access it via **ProLearnMAX**.

Have your username and password ready for login. Once logged in, go to 'My Training' on the Dashboard. You will find the No Gap & Affordability programme under 'Practice Support Programs'.

Campaign Planning & Management

Part 3

Reporting & Measures

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What Gets Measured Gets Done

There is an old saying in retail: "What gets measured, gets done"

Your first team meeting is the opportune time to set KPI's. Involving your team at the very start and seeking their feedback will give them a sense of ownership, a greater understanding of what you are trying to achieve and therefore, greater engagement.

In your business there are many things that can be measured. What are the 2 or 3 things that will really help drive patients into the practice?

Examples:

- Contact lens growth 3% to 6% by end of campaign
- Total sales growth target 10% over the period compared to last year.
- Sunglass unit sales compared to the same period last year. E.g. last year 60 units as compared to this year 90 units.
- Recall success rate. E.g. Year to date trend 20%. Target over the period 40%
- Frame unit sales compared to last year. E.g. Last year 210, this year 250.

Being able to measure results will contribute to the success of not only this campaign, but also future campaigns when you go through the review process.

Just as important as measuring results, is a solid strategy to deliver these results.

"Insanity is doing the same thing over and over again and expecting different results".

– Albert Einstein

Recalls

Managing your appointment book is a key factor in any campaign.

Take the time to consider:

- What is the most effective way for you to communicate to your patients?
  SMS. letters, postcards, third party phone call (DDM), offers?
- What is the appropriate frequency of sending recalls to effectively manage your appointment book? Weekly, fortnightly, or monthly?
- When and how do you plan to follow up with 2nd or 3rd recall?

To understand which is the best way to communicate, you must be able to measure your recall success. What process do you have to accurately measure what works and where best to invest your time and energy?

Measuring your Return on Investment

Once you decide on your marketing components, you should plan how to measure their success. There are several ways in which you can do so:

1. **Through your marketing lists.**
   Let us say you are sending a letter with an offer for your EOYHF campaign. To measure how successful the return is, you should keep the original list, then do a list with the same parameters at the end of the campaign and compare the 2. If you have sent 400 letters (original list has 400 names) and the list after the campaign has 200, then you know you had 200 of the original list come in during the campaign. You can then get a picture of what they spent by multiplying 200 by the $/Px or Average selling price from the same period (from your system KPI report).

   See **Part 5 – System Reporting** for step by step instructions for Sunix, Optomate Premier and Optomate Touch on how to run marketing/newsletter reports to help with your marketing measures.

2. **Through a discount code.**
   Let us say you are sending a letter with a 2nd pair offer for your EOYHF campaign. To measure how successful the offer was you can set up a discount code specific to that offer, then run a discount report at the end of the campaign to see how many times it was used. If you sent 400 letters originally and the discount code was used for 100, you will know how effective the offer was.

3. **Through recording the source of your patient's visit.**
   If you adjust your in-store process to include recording the source of each patients visit, you can see how many came in due to a letter, a recall or an offer etc. To do this you would need to check your source list in your system, have options that match what you want to measure (for example; recall, offer), then run a source report at the end of the campaign.

Time to Review

Well Done! The campaign is over. Time to take a well-deserved rest? Almost!

You and your team have put in so much work to achieve such great results. With so much effort, there are always things that worked well, some things that did not quite go to plan or could have been done better, or an opportunity missed.

While it's still fresh in everyone's mind, now is the perfect time to review.

Gather your team together and maybe buy them a coffee or morning tea to celebrate.

With your Campaign file set up and full of great information, use this as a guide to work on a detailed review of all aspects of your plan.

Part 3 – Reporting & Measures

Doing a review of a successful campaign may seem a waste of time but there are always a few things that could be changed or tweaked in future campaigns or special events that will add greater value. It also helps you understand what works so you can repeat it again.

Consider undertaking a SWOT analysis. A SWOT is very easy to do and very effective. The entire team will be able to contribute and it is a valuable tool to have at your disposal.

SWOT Analysis - [CAMPAIGN NAME]	
Strengths	**Weaknesses**
Your advantages	Areas for improvement
Opportunities	**Threats**
Situations to apply your advantages	Where you are at risk

SWOT simply stands for:

- Strengths
- Weaknesses
- Opportunities
- Threats

When completing the SWOT ask the following questions of yourself and your team:

- What were our strengths
- What was our weakest areas?
- What opportunities did we miss?
- What were our biggest threats?

Click here to download a basic SWOT template.

Questions?
If you need help completing a SWOT analysis, please contact your Business Coach and they will be more than happy to help.

Campaign Planning & Management

Part 4

Team & Patient Involvement

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Campaign Champion

While it is important to have a plan, it is equally important to have a person responsible to ensure the plan is executed and reviewed.

Appointing a *Campaign Champion* will help keep your plan on track and keep the team focused on delivering a WOW experience for your patients. It is also a great development opportunity for a member of the team.

Organise a Team meeting

Communicating with your team about which role each of them plays in the successful execution of a campaign plan is critical.

Involving your team in the early planning stages will give them a sense of ownership and pride in contributing to a successful result.

It creates an opportunity to confirm the timelines, processes and inclusions while also allowing time for any questions.

Weekly and daily huddles communicating results and "what's next" will also play a key role.

Patient Involvement

While your marketing will target your existing patient base who are due to come in (or part of the criteria you have set for your marketing list), it does not cover everyone.

During any campaign you will have new patients and existing patients come in or call to organise an appointment. If you spend time setting up spiels or conversation starters with your team, you may convert or increase your offer results.

Example 1 – EOYHF campaign:
A new patient comes into practice to look at frames and asks about an appointment. If you were to discuss your offer or the patient's health fund status with them, you are more likely to convert them to book and purchase. Your team member could introduce the subject by asking if they are in a health fund. If yes, they could make the patient aware that it's a good thing they are booking now, because with most health funds the rebate is due to expire at the end of the year and they will lose it if left unused. The team member could also advise that by purchasing now there is an opportunity to also choose sunglasses to purchase in the new year to maximise next year's rebate.

Example 2 – Lab partner Second Pair offer that you are passing on to your patients:
A new patient comes into practice to look at frames and ask about an appointment. Again, you could help convert them by mentioning the 2nd pair offer you have. If the patient is wearing distant glasses or multifocals, you could mention that they have come in at a great time because you currently have a 2nd pair offer of X, which means they could also update their sunglasses.

With each campaign consider the existing and new patients who don't know about your offer because they didn't receive any marketing. Discuss this in your team meeting and think about how you can introduce the offer or campaign to them.

Campaign Planning & Management

Part 5

System Reporting

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Campaign Success Rate – EOYHF Campaign

Following these 4 steps will help you measure the return on your marketing spend for a campaign:

1. Compile the list you wish to market to, and record the number you will market to
2. Compile the list of who came in during the campaign as a result of your marketing
3. Use your KPI results to calculate how much income you produced based on the number of people who came in that you marketed to
4. Compare your marketing spend to the amount spent by the patients you marketed to

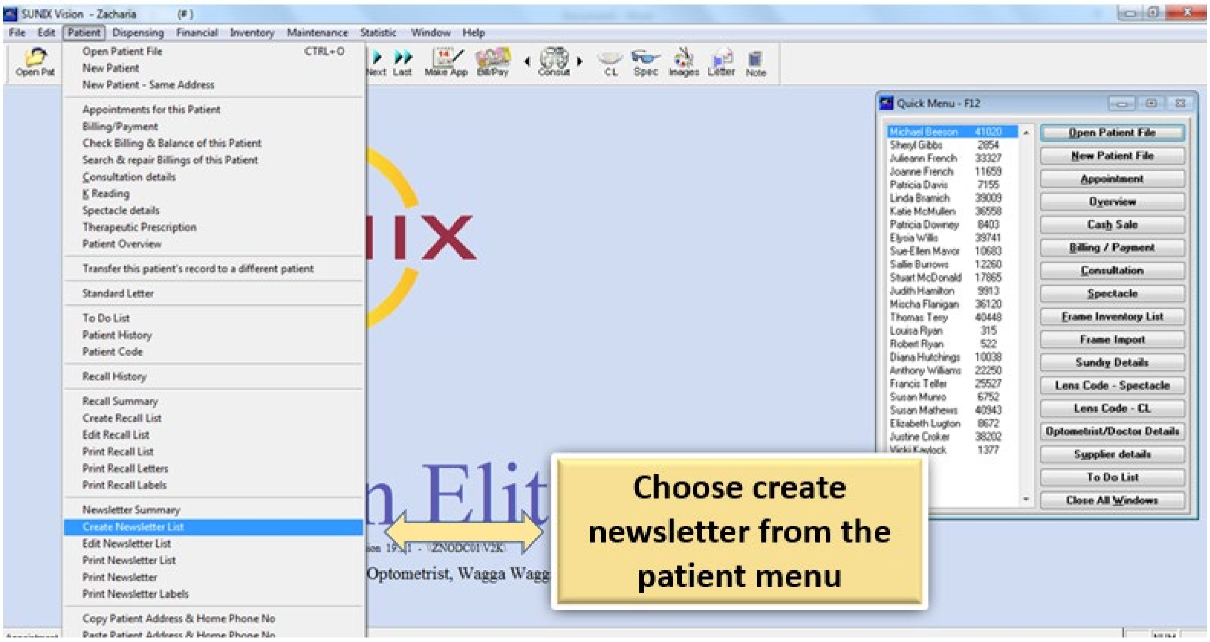
To help you run marketing/newsletter reports, we have included below step by step instructions for:

- **SUNIX – Pages 16-18**
- **Optomate Premier – Pages 19-21**
- **Optomate Touch – Pages 22-24**

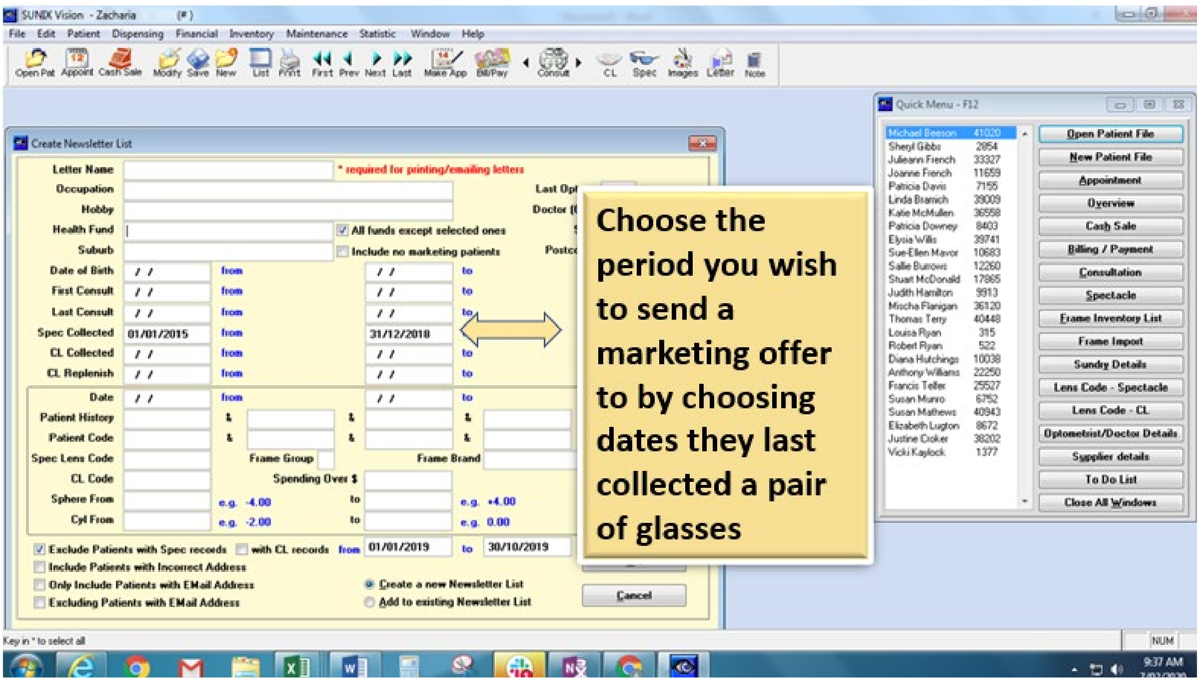
SUNIX

Running the original marketing list – in Sunix this is a newsletter list.

Step 1



Step 2

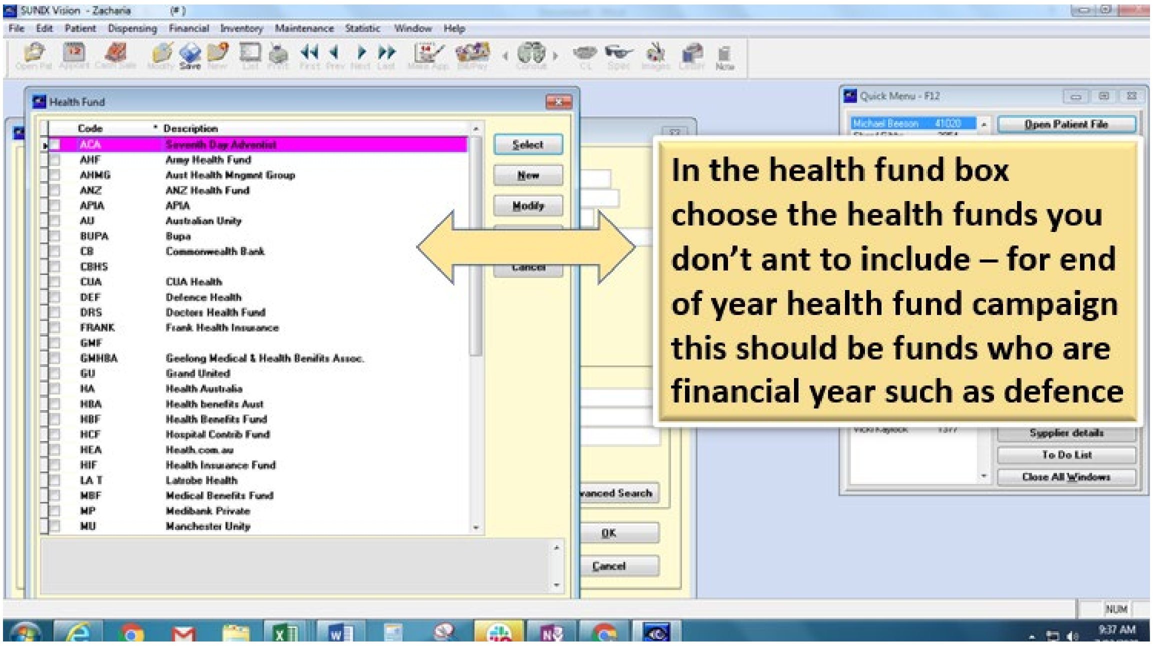


Campaign Planning & Management

Part 5 – System Reporting

Step 3

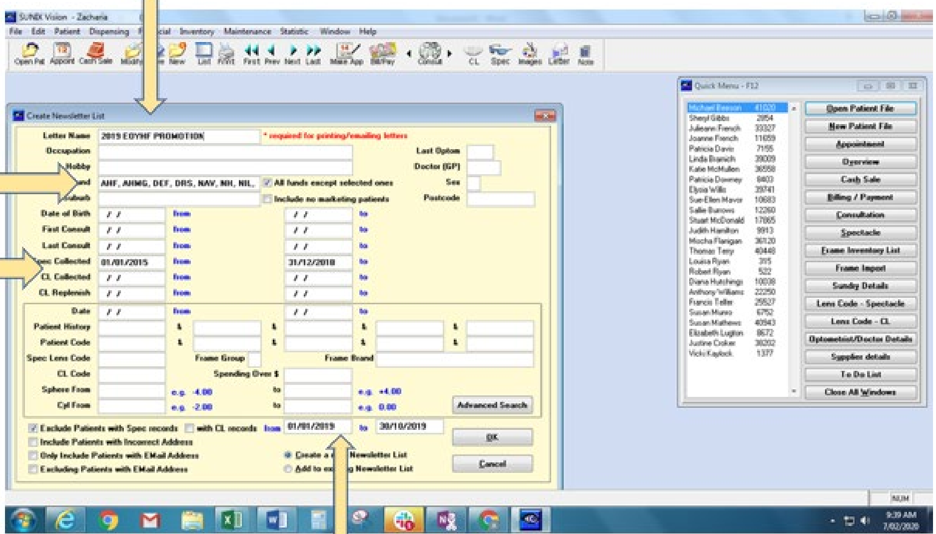
SUNIX Continued



Step 4

Choose a campaign list name

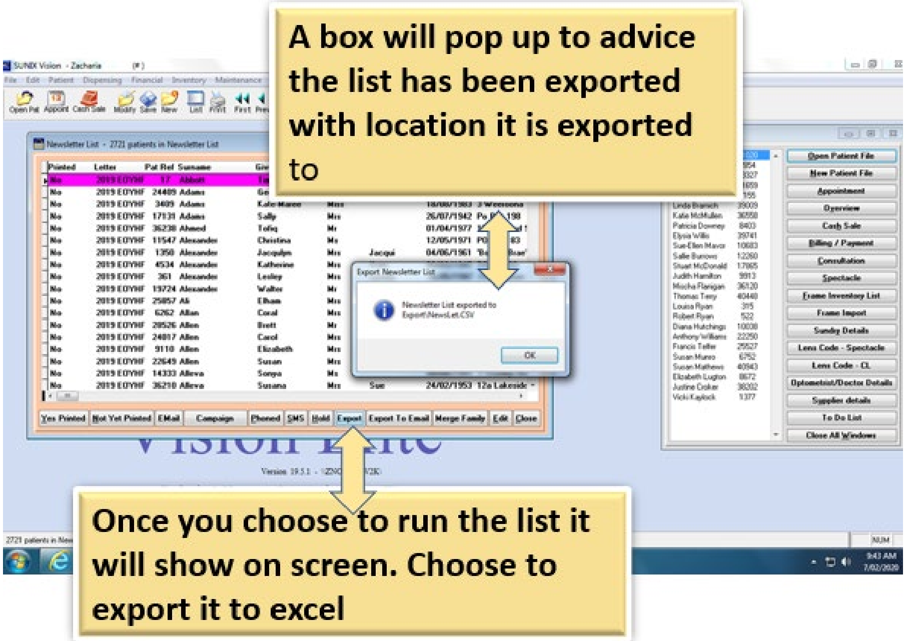
Health fund exemptions and dates specs last collected are chosen



Exclude dates of patients who have been in the year you are running the marketing list

Step 5

SUNIX Continued



Running a list of who purchased during the campaign period

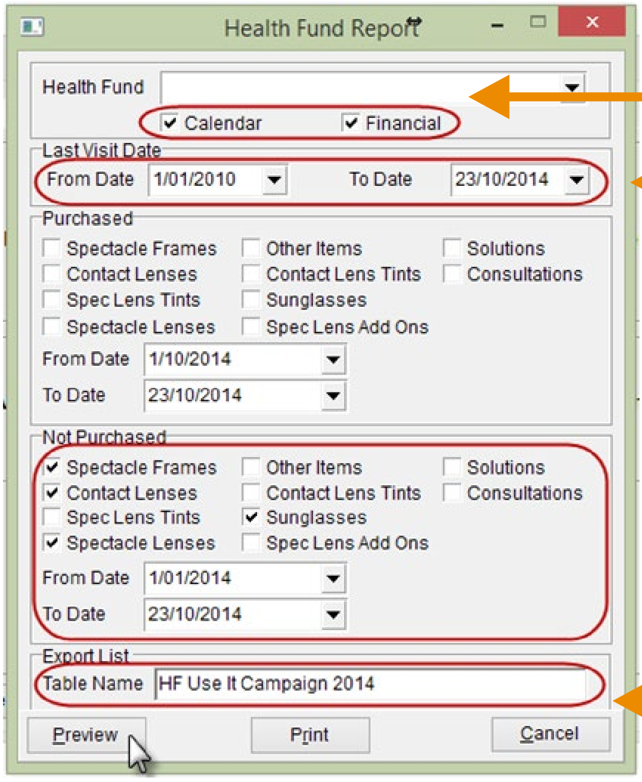
1. Run the same reports with same information you did for the original list with a new name.
2. In the bottom section where you exclude patients who have been in that year, change the end date to match the date the campaign ended (for end of year leath fund this will be 31st December)
3. Export the list to excel
4. The difference in the number of people on the report will be the amount of people who came in during the campaign period (for example the original list had 2000 people, the list created at the end of the campaign had 1800 people so 200 people from the original list came in)
5. Multiply the amount of people who came in by the average selling price or the average $/patient (you can find the average selling price by running a KPI report for the period of the campaign).
6. Compare what you have spent on the campaign to the income generated

SUNIX Newsletter List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	
Number of Patients who Responded	
Average Frame & Lens Pair Price	
Average $ per patient	

OPTOMATE PREMIER

Step 1

Run a marketing list for your campaign.



Decide the health fund type – if for end of year health fund campaign, the calendar year option should be ticked

Choose the date range you want to send your campaign offer to. This will be the last date they came into practice. You can choose to capture the last 2-3 years in this offer or more

Decide on the products you want to include in your list and add in the date. If you are looking for end of year health fund you would only put dates covering that calendar year

Choose a name for the list and note it down so you can refer to it when you are looking at your results at the end of the campaign

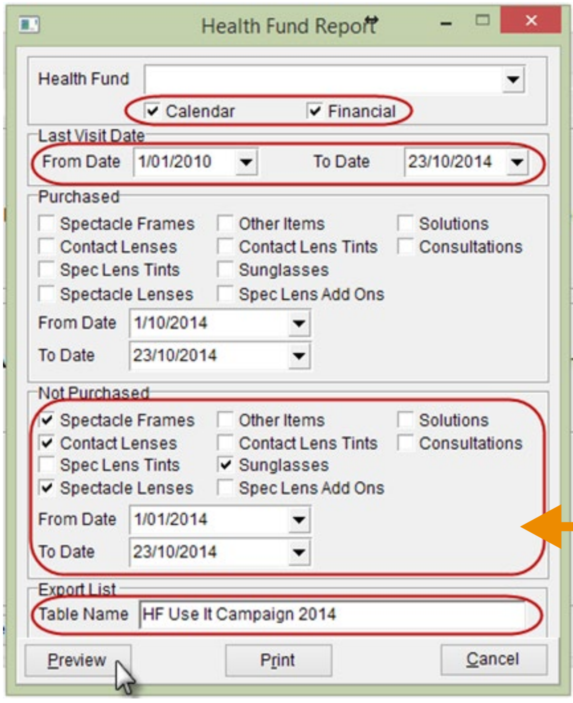
Record the following numbers:

Original Optomate Premier Marketing List	
Number of Patients Removed from the list	
Total Number Patients	

Step 2

OPTOMATE PREMIER Continued

Now re-run your marketing list for EOYHF the same way, except change the last visit date and or purchase date to the end of the campaign period date. For example if you ran the first report on 30th October 2020 then you would adjust the last visit and not purchased date to 31st December 2020 which would be the end of the campaign period.



Ensure that the last visit to date is changed to 31/12/19

Ensure that Not Purchased Date is 31/12/19

Record the number of patients on the new marketing list for the campaign period:

Original Optomate Premier Marketing List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	

The difference in the number of people on the report will be the amount of people who came in during the campaign period. For example, the original list had 2000 people, and you removed 200 people from the list, the list created at the end of the campaign had 1600 people so 200 people from the original list came in.

Original Optomate Premier Marketing List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	
Number of Patients who Responded	

Step 3 OPTOMATE PREMIER Continued

The final step is to understand how much was spent during the campaign by the patients you marketed to.

On your KPI report record your Average frame and lens pair:

Original Optomate Premier Marketing List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	
Number of Patients who Responded	
Average Frame & Lens Pair Price	
Average $ per patient	

Practice KPI Report

Demonstration Version

30/05/2016 1:16:33 PM

1/05/2014 - 31/05/2014

Branch: All

Consultations To Dispensing		
Total Consultation Accounts	0	
Same Day	0	0.00%
Within One Week	0	0.00%
Within Two Weeks	0	0.00%
Recall Success		
Total Recalls Sent	0	
Return Within One Month	0	0.00%
Return Within Two Months	0	0.00%
Return Within Three Months	0	0.00%
Return Greater Than Three Months	0	0.00%
Quotes to Accounts		0.00%
Spectacle Lenses		
Total Lens Sales	0	
Lens Only Sales	0	0.00%
Multicoat Sales	0	0.00%
Hardcoat Sales	0	0.00%
High Index Lens Sales	0	0.00%
Single Vision Sales	0	0.00%
Bifocal Sales	0	0.00%
Trifocal Sales	0	0.00%
Progressive Sales	0	0.00%
Progressive Near Sales	0	0.00%
Glass Sales	0	0.00%
Plastic Sales	0	0.00%
Polycarbonate Sales	0	0.00%
Trivex Sales	0	0.00%
Photochromatic Glass Sales	0	0.00%
Photochromatic Resin Sales	0	0.00%
Transitions Brand Sales	0	0.00%
Polarise Treatment Sales	0	0.00%
Sunglass With Lens Sales	0	0.00%
Contact Lenses		
Total Contact Sales	0	

Jobs		
Total Jobs (Ex-Warranties)	0	
Spectacle Jobs (Ex-Warranties)	0	0.00%
Spectacle Jobs-Own Frame	0	0.00%
Spectacle Job-Warranties	0	0.00%
Spectacle Jobs-Online	0	0.00%
Spectacle Jobs-Online Warranties	0	0.00%
Contact Lens Jobs	0	0.00%
Contact Lens Job-Warranties	0	0.00%
Total Job-Warranties	0	0.00%
Multiple Spectacle Jobs	0	0.00%
Sales/Cash Sales		
Total Sales (Ex-GST) After Discount		$0.00
Total Sales (Ex-GST) After Discount Today		$0.00
Total Sales (Ex-GST) After Discount MTD		$0.00
Total Sales (Ex-GST) After Discount YTD		$0.00
Total Sales (Ex-GST) Per Patient		$0.00
Total Discounts		$0.00
Number of Discounts	0	
Average Discount		$0.00
Discount % Of Sales	0%	
Receipts/Cash Sales		
Total Receipts		$0.00
Total Receipts Today		$0.00
Total Receipts MTD		$0.00
Total Receipts YTD		$0.00
Deposit Ratio	0%	
Average Sales Value (Ex-GST)		
Spectacle Frames		$0.00
Spectacle Lenses (Pair)		$0.00
Spectacle Lens Add-Ons (Pair)		$0.00
Spectacle Lens Tints (Pair)		$0.00
Frame + Lens (Pair)		$0.00
Contact Lenses (Pair)		$0.00

Step 4

You can now compare what you spent on advertising/marketing to what you earned, to get an idea of what your return was. It is not exact but if you use this in conjunction with some KPI measures such as growth, conversion, or multiple pairs you will have a guide to understand how successful your campaign was.

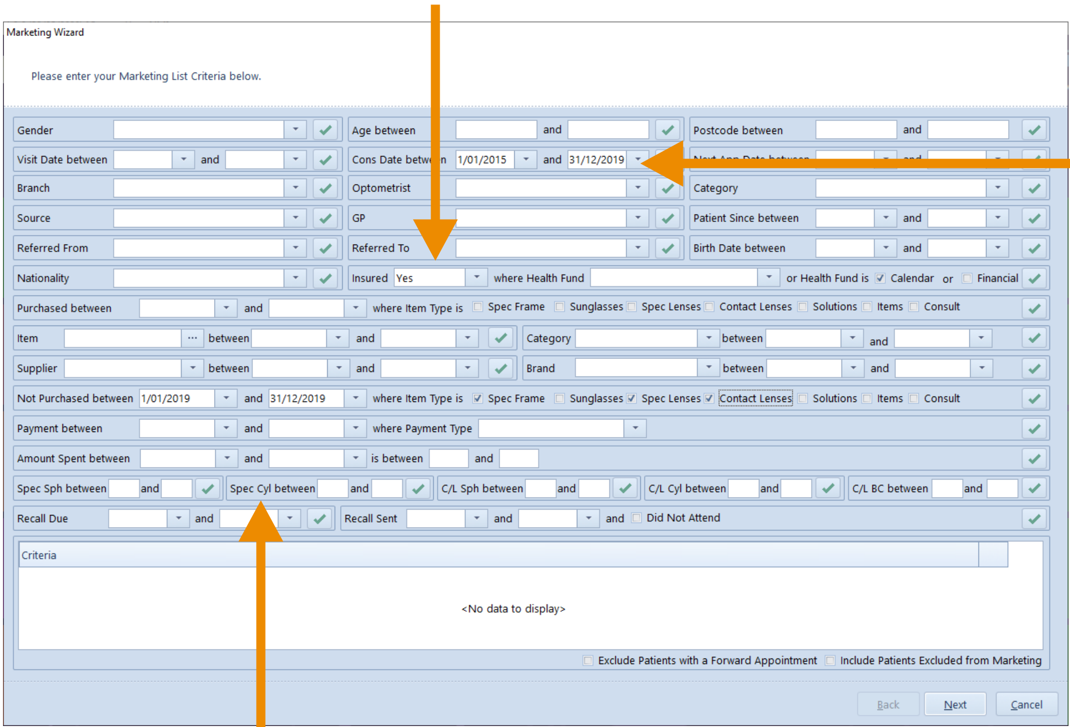
OPTOMATE TOUCH

Step 1

Run a marketing list for your campaign.

Tick to apply to those who are insured

Choose the date range you want to include for your marketing list. This may be 2-3 years or more. Include this in the cons date area



Add dates for not purchased. This should be the year you are completing the campaign for, to show those who haven't purchased that year.

You can also choose the products you want included

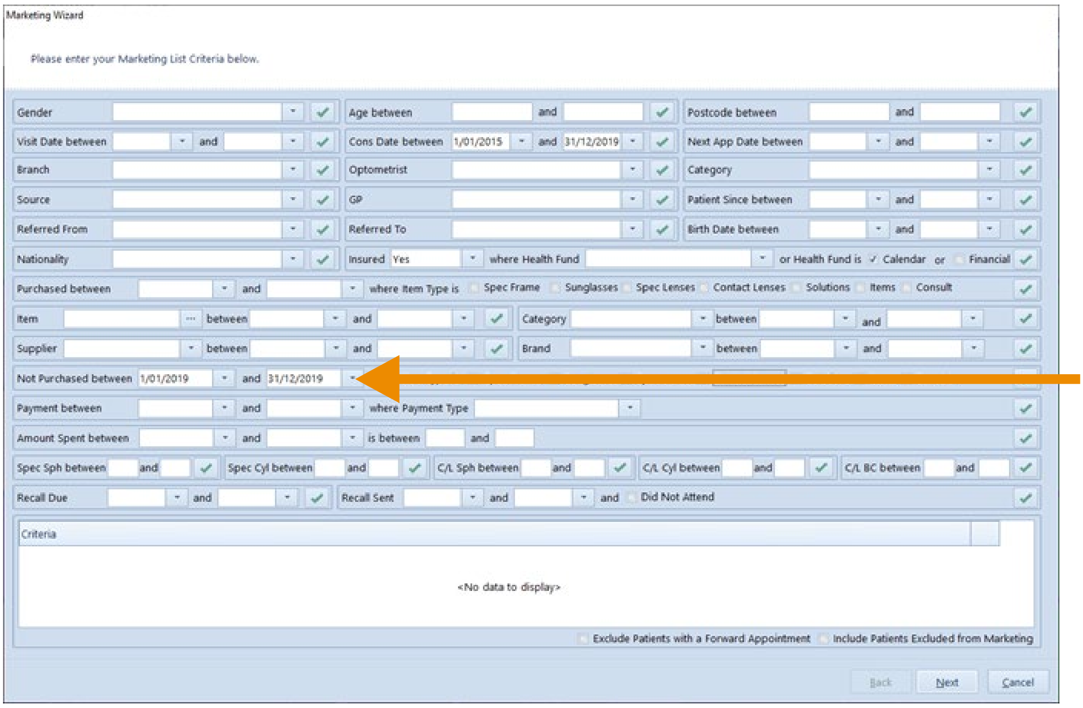
Record the following numbers:

Original Optomate Touch Marketing List	
Number of Patients Removed from the list	
Total Number Patients	

You may choose to remove some patients based on the criteria you have set.

Step 2 OPTOMATE TOUCH Continued

Now re-run your marketing list for EOYHF the same way, except change the last visit date and or purchase date to the end of the campaign period date. For example, if you ran the first report on 30th October 2020 then you would adjust the last visit and not purchased date to 31st December 2020 which would be the end of the campaign period.



Adjust the purchase date so it ends when your campaign ended but leave the start date the same for measuring who purchased

Record the number of patients on the new marketing list for the campaign period:

Original Optomate Touch Marketing List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	

The difference in the number of people on the report will be the amount of people who came in during the campaign period. For example, the original list had 2000 people, and you removed 200 people from the list, the list created at the end of the campaign had 1600 people so 200 people from the original list came in.

Original Optomate Touch Marketing List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	
Number of Patients who Responded	

Step 3

OPTOMATE TOUCH Continued

The final step is to understand how much was spent during the campaign by the patients you marketed to.

On your KPI report record your Average frame and lens pair:

Original Optomate Premier Marketing List	
Number of Patients Removed from the list	
Total Number Patients	
New Marketing Report Patient Numbers	
Number of Patients who Responded	
Average Frame & Lens Pair Price	
Average $ per patient	

KPI Report

From: 15/11/2019 to 31/12/2019

Sales (Ex-Tax) after Discount		
15/11/19 - 31/12/19		
01/01/19 - 31/12/19		
Per Patient		$311.31

Average Sales Value (Ex-Tax)		
Frames	$40,285.02	$232.86
Spectacle Lenses (Pair)	$65,653.95	$298.43
Lens Add-Ons (Pair)	$14,230.45	$84.96
Lens Tints (Pair)	$0.00	$0.00
Contact Lenses (Pair)	$5,674.20	$257.92
Lens Tints (Pair)	$0.00	$0.00
Sunglasses	$12,731.18	$212.19
Solutions	$2,856.59	$18.67
Other Items	-$415.08	-$7.69
Consultations	$41,409.95	$46.16

Discounts	$6,165.05
Number	74
Average ($)	$83.31
Discount % of Sales	3.17%

Receipts	
15/11/19 - 31/12/19	$213,376.26
01/01/19 - 31/12/19	$1,524,825.46

Spectacle Orders		318
Ex-Warranty	304	95.6%
Warranty	9	2.83%

All Inventory (Ex-Tax)		09/06/20
Total	1,305	$71,655.60
Avg Weighted Inventory Cost		$54.91
Inventory to Sales Ratio		0.39

Spectacle Lens Sales		278
Lens Only	80	28.78%
Multicoat	222	79.86%
Hardcoat	236	84.89%
High Index Lens	36	12.95%
Single Vision	144	51.8%
Bifocal	12	4.32%
Trifocal	0	0%
Progressive	118	42.45%
Progressive Near	2	0.72%
Glass	0	0%
Plastic	252	90.65%
Polycarbonate	6	2.16%
Trivex	0	0%
Photochromatic Glass	0	0%
Photochromatic Resin	52	18.71%
Transitions Brand	55	19.78%
Polarise Treatment	27	9.71%
Sunglass with Lens	25	8.99%

Contact Lens Sales	28

$/patient

Average selling price for frames, lenses etc.

Step 4

You can now compare what you spent on advertising/marketing to what you earned, to get an idea of what your return was. It is not exact but if you use this in conjunction with some KPI measures such as growth, conversion, or multiple pairs you will have a guide to understand how successful your campaign was.