

# Elevating Your Marketing Strategy & Impact in Small & Rural Health Care

## WORKSHEET

Name of Project/campaign/initiative: \_\_\_\_\_

### Assessing Your Current State:

In this section, it's time to be honest. As you evaluate your current marketing efforts, answer these questions. This should be a neutral observation of the state of your current marketing efforts and initiatives

What is your organization's primary mission/purpose?

What are the organization's top 3 business priorities?

What are the primary goals of my work in marketing? Are they aligned with the overall business initiatives and priorities of the organization?

Who is my primary target audience? Be as specific as possible.

What channels am I currently using? Are they working? How do you know?

Who are our primary competitors or “threats” in our market?”

What are my primary messages that we are using to promote this initiative? When was the last time I reviewed them and evaluated their impact and engagement?

Who are the primary stakeholders that I regularly report progress and impact of this work to?

Is the work moving the needle? How do you know? What proof do you have?

Who else do I need to collaborate with to be more successful in my work?

What are your current biggest challenges or obstacles in being more effective and impactful with your marketing work?

Can you quickly and clearly demonstrate ROI of your work to executive leaders?

## Getting Clear on Your Strategy:

This section will help you address your strategic plan for this specific initiative or project. Be as honest as possible and if you don't have an answer or it doesn't apply, leave it blank.

For the specific initiative you have in mind (project, overall strategy, etc.), answer these strategic questions:

What is the goal(s) of this initiative?

What is the timeline?

Who is the primary target?

What do they want or need? How can you get more feedback on this information?

What business imperative is this work supporting?

How do you know? What measure will you use to demonstrate impact and ROI?

What does a “win” look like on this event - what is “good enough”?

What is the budget? What other resources will I need?

Does this project need an “appetizer” effort or a “full meal deal”?

Can you do that yourself? Do you need help?

List specifically the areas you need help on:

Where will you get help? What process will that involve?

How will you report the progress, impact, ROI or status of this project? To whom?

## Aligning Your Work to What Matters:

Now, as you have outlined your organizational purpose, goals, mission, etc. Take a look at the specific initiative you have in mind (project, overall strategy, etc.), answer these questions to help you identify what ROI your activity will result in.

Is the project you have in mind supporting the top business priorities of the organization? Which ones?

If not, is it necessary? OR, how can you align it to the MIT (most important things) in your organization?

Who do you need to build a better relationship with in the organization so you can collaborate on driving impact in their area or toward the MIT for the business?

Is there anything on your workload right now that you can't demonstrate ROI or impact from?

Is there anything on your workload right now that you know you need to drop or make adjustments to the time and resources invested in?

Do you have the right people at the table in preparing or planning for this initiative? Who else do you need to include in this strategic planning to ensure your work is having impact?

## Aligning Your Messaging:

Humans have changed, organizations have changed. These questions are designed to help you evaluate if your messaging is aligned and having impact.

When was the last time you reviewed your messaging in your organization?

How strong is the engagement in your content?

Is that universal across the board or just in certain areas, on certain channels, or in certain segments? What do you think is the difference for this area?

Any transferrable insights you can take to apply to other areas that have less engagement?

What data sources or information do you use to capture the voice of the customer and understand what they need to leverage in your messaging at your organization?

Is your messaging more focused on things and facilities than people?

Based on the findings from Monigle on the Humanizing Brand Experience v. 6 study, referenced in our session, what areas do you feel you could emphasize in your brand messaging to better engage with patients/consumers and build trust with your target audience?

What obstacles or challenges are there for making these shifts in the messaging?

How would you rewrite your key messaging points after this understanding? Write them out here. Think about how you can master the art of 1:1 conversation in your materials. What would say over a cup of coffee?

## Reporting and Talking About Your Impact:

Reporting your results and impact throughout the organization is not only important, it could make a difference in the funding you receive and in your career development. Ask yourself these questions and see where you might need to change your approaches.

Are you regularly sharing the impact of your marketing efforts? Where and how are you doing so? Who else needs to hear it?

If you do not share your results currently, who in your organization (be specific) needs to know what you are working on and how you are doing?

How often can/should you share your impact or updates? Be specific about where and when and with whom you will share.

How can you demonstrate how your work supports the work of other leaders in your organization? (Be specific).

Do you have a dashboard or reporting mechanism to track your work? If not, try to copy the simple template we are sharing to use in your organization. What specific measures will you include? List them here.



## Applying Your Learnings:

Now it's time to consider what needs to change - what will you do differently? More of? Less of? Who do you need to build an alliance with to get the information you need? Who can you support and share your impact with?

Based on what you learned and worked through on your worksheet, what 1 or 2 changes do you need to make in your marketing role/activity/function?

Identify one person you need to collaborate and set an appointment with when you get back to you.

Share other take aways you discovered today