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a codesm company

The 2027 Healthcare Marketing Plan Workbook

A working plan for filling your schedule with the right patients, location by location and service line by service line. Fill in each page with your practice administrator and one provider, then review it every quarter.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our healthcare marketing plan guide at trymaas.com/blog. Read the guide once for context, then fill in one section per week. Every box in this PDF is a form field: type straight into it in Acrobat, Preview or your browser, then save.

THE THIRTEEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Customer personas
4. Competitive analysis
5. Brand positioning
6. Goals and KPIs
7. Customer journey map
8. Channel strategy
9. Content strategy and calendar
10. Budget, stack and measurement
11. 12-month plan
12. Common mistakes
13. Quick start

> **Time budget.** Most sections take 30 to 60 minutes. Do them in order: positioning (section 5) only holds up once the snapshot, SWOT, personas and competitor work are done.

NEED HELP?

If you would rather have a team build and run this plan with you, MaaS by CodeSM is an outsourced marketing team for independent and multi-location medical practices: primary care, specialty, urgent care, and dental and orthodontic offices. Book a call at **trymaas.com/get-a-demo**.

SECTION 1 · WHERE YOU ARE TODAY

Business snapshot

One page that anyone on your team, or any partner you hire, can read in two minutes.

BUSINESS NAME

LOCATIONS / SERVICE AREA

CORE SERVICES OR PRODUCTS

AVERAGE SALE OR CUSTOMER VALUE

TOP THREE CURRENT SOURCES OF CUSTOMERS

REVENUE GOAL FOR THE YEAR

CURRENT MONTHLY MARKETING BUDGET

WHO OWNS MARKETING TODAY

WHAT MAKES CUSTOMERS CHOOSE US OVER THE ALTERNATIVES?

WHAT HAS WORKED IN MARKETING SO FAR, AND WHAT HASN'T?

SECTION 2 · HONEST INTERNAL AUDIT

SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about your market. Every weakness is a message you should not lead with; every opportunity is a campaign you haven't run yet.

STRENGTHS

Where do you beat nearby practices today? Think same-week access, evening or weekend hours, languages spoken, in-house labs or imaging, strong ratings at a specific location, a well-known provider.

WEAKNESSES

Where do patients choose someone else? Long new-patient waits, phones that ring out, thin reviews at a newer location, no online booking, unclear insurance information, a dated website.

OPPORTUNITIES

What demand is going unmet nearby? A growing area short on primary care, a self-pay service no one offers, employers without a clinic partner, specialists who need a reliable referral partner.

THREATS

What could take patients away? Retail clinics and telehealth apps, hospital systems buying nearby practices, payer rate cuts, a provider departure, new competitors opening close to one of your locations.

TOP TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING

THE ONE WEAKNESS TO FIX BEFORE WE SCALE SPEND

SECTION 3 · CUSTOMER PERSONAS · PERSONA 1

The Network Checker

Insured, new to the area or new to a plan, looking for a provider who is in-network and taking patients.

Searches by specialty, location and insurance plan, then checks reviews and next availability. Books with the practice that makes plan acceptance and open appointments easy to confirm.

INSURANCE PLANS THEY CARRY

SEARCH TERMS THEY USE

DISTANCE THEY WILL TRAVEL

DECISION CRITERIA IN ORDER

BOOKING PREFERENCE (PHONE, ONLINE, WALK-IN)

WHAT MAKES THEM HESITATE

HOW QUICKLY CAN THIS PATIENT CONFIRM WE TAKE THEIR PLAN AND SEE OUR NEXT OPENING?

WHAT WOULD MAKE THEM PICK A PROVIDER IN OUR GROUP OVER A HOSPITAL-OWNED PRACTICE?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Same-Day Searcher

Sick now, or a child is, and choosing from the map in minutes.

Searches phrases like urgent care near me or doctor open Saturday and decides on hours, wait time, distance and rating. Your Google Business Profile and phone answer rate are most of the sales process.

TIMES OF DAY THEY SEARCH

TYPICAL REASONS FOR VISIT

LOCATIONS THEY COMPARE

WAIT TIME THEY WILL ACCEPT

INSURANCE OR SELF-PAY

HOW THEY CONTACT YOU

DOES EVERY LOCATION PROFILE SHOW ACCURATE HOURS, WAIT OR CHECK-IN OPTIONS AND A WORKING BOOKING LINK?

WHAT HAPPENS WHEN THIS PATIENT CALLS AND THE FRONT DESK IS BUSY?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Self-Pay Shopper

Paying out of pocket and comparing price, results and reviews.

Looking for services insurance does not cover or that they choose to pay for, such as aesthetics, weight management, membership primary care, physicals or clear aligners. Expects published prices and a clear consult process.

SERVICE THEY WANT

PRICE RANGE THEY EXPECT

PRACTICES THEY ARE COMPARING

PROOF THEY NEED (RESULTS, REVIEWS, CREDENTIALS)

FINANCING OR PAYMENT PLAN NEEDS

BEST TIME TO FOLLOW UP

ARE OUR SELF-PAY PRICES AND GOOD FAITH ESTIMATE PROCESS EASY TO FIND AND UNDERSTAND?

WHAT PROOF WOULD CONVINCE THIS PATIENT TO BOOK A CONSULT WITH US INSTEAD OF THE CHEAPEST OPTION?

SECTION 4 · KNOW THE FIELD

Competitive analysis

List the four or five businesses your customers compare you with, including the ones that aren't really competitors but win the same budget. Fill in what you can see from the outside.

BUSINESS	GOOGLE RATING AND REVIEW COUNT PER LOCATION	NEXT AVAILABLE NEW-PATIENT APPOINTMENT	INSURANCE PLANS ACCEPTED	ONLINE BOOKING AVAILABLE	PROVIDERS AND SPECIALTIES LISTED	SELF-PAY PRICES PUBLISHED
Us						
Competitor 1						
Competitor 2						
Competitor 3						
Competitor 4						
Competitor 5						

WHERE WE CLEARLY WIN

WHERE WE LOSE TODAY, AND WHY

SECTION 5 · ONE SENTENCE THAT DECIDES EVERYTHING

Brand positioning

Positioning is the reason a customer should pick you. Write it before you write a single ad.

For [who you serve] who [need or problem], [your business] is the [category] that [main benefit]. Unlike [main alternative], we [proof].

WORKED EXAMPLE

> *For working families in north Austin who need a doctor they can actually get in to see, Larkfield Family Medicine is the independent primary care practice that offers same-week new-patient visits and evening hours at three locations, because every provider keeps protected new-patient slots each day.*

OUR POSITIONING STATEMENT

PROOF POINT 1

PROOF POINT 2

PROOF POINT 3

SHORT VERSION FOR THE WEBSITE HEADLINE

SECTION 6 · WHAT WINNING LOOKS LIKE

Goals and KPIs

Three to five SMART goals: specific, measurable, achievable, relevant, time-bound.

#	GOAL	CURRENT	TARGET	BY WHEN / OWNER
1				
2				
3				
4				
5				

Examples. Book 140 new-patient appointments a month across three locations by June 2027, up from 95. Hold cost per booked new patient under $150 for insured primary care, measured monthly. Reactivate 600 patients overdue for an annual visit by the end of Q3 2027. Reach a 4.7 average rating with 150 or more reviews on each location profile by December 2027.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
New-patient appointments booked, by source and location					
Cost per booked new patient, by channel					
Calls answered live (%)					
Missed-call callback time					
New reviews and average rating, per location					
Open new-patient slots in the next 14 days					

SECTION 7 · FROM FIRST SEARCH TO REPEAT CUSTOMER

Customer journey map

Where your customer is, what they are doing, and where you meet them. Fill in the last column with what you will do at each stage.

STAGE	WHAT THE CUSTOMER DOES	WHERE WE MEET THEM	OUR ACTION
Need	Has a symptom, moves, changes plans, gets a recall reminder or a referral.	Recall messages, referral letters, word of mouth	
Search	Looks for a service, provider type or symptom near them.	Google search and Maps, insurer directories, AI assistants	
Compare	Reads reviews, provider bios and hours; checks distance.	Google Business Profiles, practitioner profiles, provider pages	
Insurance and availability check	Needs to confirm their plan is accepted and when they can be seen.	Location pages with plan lists, online booking, self-pay price pages	
First contact	Calls, books online, submits a form or texts. Gives up if no one answers.	Phone line with call tracking, booking widget, forms	
Booking and intake	Wants a confirmation, simple digital forms and reminders.	Confirmation and reminder messages, intake forms, good faith estimate for self-pay	
Visit	Judges wait time, front desk, provider and checkout.	In-clinic experience, signage, checkout process	
Follow-up	Expects results, next steps and a way to ask questions.	Patient portal, follow-up calls, satisfaction check	
Recall	Is due for an annual visit, follow-up, hygiene or screening, and may forget.	Recall and reactivation email, SMS and portal campaigns	
Review and referral	Shares the experience if asked at the right moment.	Review request sent to every patient, referral program, family scheduling	

SECTION 8 · WHERE THE BUDGET GOES

Channel strategy

Tick the channels you will run this year and name an owner for each. Investment ranges are planning ranges; adjust to your market.

USE	CHANNEL	ROLE	CADENCE	TYPICAL INVESTMENT	OWNER
☐	**Google Business Profile, each location**	Map visibility, reviews, booking link	Weekly posts, monthly photos	Free + 1 hr/week per location	
☐	**Practitioner profiles**	Rank for provider names and specialties	Monthly review	Staff time	
☐	**Website service-line and location pages**	Convert search traffic and answer insurance questions	Update quarterly	$3,000 to $15,000 build, then upkeep	
☐	**SEO and content**	Compounding organic demand and AI visibility	2 to 4 pages or articles a month	$1,500 to $5,000/month	
☐	**Google search ads**	Capture high-intent searches by service line	Always on	$2,000 to $10,000/month	
☐	**Meta ads**	Self-pay programs, new openings, events	Campaign bursts	$500 to $3,000/month	
☐	**Directories and booking platforms**	Insured patient discovery by plan and availability	Keep data current monthly	Varies by platform	
☐	**Recall and reactivation**	Fill open slots from existing patients	Monthly campaigns plus automated reminders	$100 to $500/month in tools	
☐	**Review program**	Build review volume and rating per location	After every visit, automated	$200 to $500/month	
☐	**Referral outreach**	Specialist referrals from primary care and community partners	Monthly visits or lunches	Time + modest budget	
☐	**Community events**	Health fairs, school and employer screenings	Quarterly	$500 to $5,000 per event	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Plan 3 to 4 social posts a week, mostly short video and carousels, plus 2 to 4 web pages or articles a month and one patient newsletter. Use providers and staff on camera; patient stories need a signed HIPAA authorization.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Service-line explainers	Web page + carousel	2 per month	What a sports physical includes, what it costs, and how to book one this week
2. Provider introductions	60-second video	1 per provider per quarter	Meet Dr. Nguyen: why she chose family medicine and the languages she speaks
3. What to expect	Short video or article	2 per month	Your first visit with us, from check-in to checkout, in 45 seconds
4. Insurance and pricing	Web page + post	Monthly	Which plans we accept in 2027 and what self-pay visits cost
5. Seasonal health	Post + email	Monthly	Flu shots are in: walk-in hours at all three locations
6. Condition education	Clinician-reviewed article	1 to 2 per month	When a cough needs a doctor visit, explained by our medical director
7. Community	Photo post or reel	Twice a month	Our team at the school district health fair this Saturday
8. Practice news	Post + Google Business Profile update	As it happens	Now open Saturdays at our north location

OUR THREE CONTENT PILLARS THIS YEAR

SECTION 9 · CONTENT AND SOCIAL

30-day content calendar

Plan one month ahead. Write the post idea and the channel in each day you publish.

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

SECTION 10 · BUDGET ALLOCATION

Budget allocation

A starting split for a typical business in this industry. Write your own percentages and monthly dollars next to it.

TOTAL MONTHLY MARKETING BUDGET (AD SPEND + PEOPLE + TOOLS)

BUCKET	EXAMPLE	WHY	OUR %	MONTHLY $
Google search ads	38%	Service-line campaigns, budget shifted toward providers with open capacity		
SEO and content	21%	Service-line, location and condition pages; technical upkeep		
Meta ads	10%	Self-pay programs, openings and events; no health-based retargeting		
Directories, listings and reputation	11%	Booking platforms, listings tool, review program		
Recall, messaging and tracking	7%	Patient messaging plus HIPAA-ready call tracking and analytics		
Photo and video production	7%	Provider videos, location photos, seasonal content		
Contingency	6%	Move to what is working mid-month		

WHAT WE WILL CUT FIRST IF RESULTS LAG, AND WHAT WE WILL ADD FIRST IF THEY BEAT TARGET

SECTION 10 · TOOLS AND MEASUREMENT

Tech stack and weekly dashboard

STACK CHECKLIST

- [ ] Google Business Profile claimed and verified for every location and public-facing provider
- [ ] Duplicate and outdated profiles merged or removed
- [ ] Apple Business Connect and Bing Places listings matching your Google data
- [ ] Website tracking audit completed; no ad pixels or session recording on portals or forms with health information
- [ ] Business associate agreements on file for every vendor that touches patient information
- [ ] Call tracking that will sign a BAA, with numbers by channel and location
- [ ] Lead source captured on every booking in your PM/EHR or CRM
- [ ] Online booking or appointment request live on every location page
- [ ] Recall and reactivation lists set up in your patient messaging tool
- [ ] Review request sent to every patient, with a response policy that never confirms patient status
- [ ] Good faith estimate process for self-pay patients
- [ ] Weekly dashboard with bookings by source and location

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
New-patient appointments booked, by source and location				
Cost per booked new patient, by channel				
Calls answered live (%)				
Missed-call callback time				
Form and online request response time				
New-patient show rate				
New reviews and average rating, per location				
Open new-patient slots in the next 14 days				

SECTION 11 · THE YEAR AT A GLANCE

12-month action plan

The order we suggest. Move rows to fit your season, add an owner, and tick each one off.

WHEN	FOCUS	OWNER	DONE
Month 1	Snapshot with capacity, personas, positioning; audit every Google Business Profile and fix duplicates		☐
Month 2	Website tracking audit and BAAs; review request process and response policy		☐
Month 3	Service-line pages for your top three lines, split into insured and self-pay; launch Google search ads on those lines		☐
Month 4	First reactivation campaign to overdue patients; start the weekly dashboard		☐
Month 5	Provider introduction videos and practitioner profile cleanup		☐
Month 6	Mid-year review: cost per booked new patient by channel, location performance, budget moves		☐
Month 7	SEO content plan: condition and location pages; referral outreach routine		☐
Month 8	Back-to-school and sports physical campaign; community event		☐
Month 9	Flu season and fall recall campaign; directory and insurer listing audit		☐
Month 10	Self-pay program push with clear pricing and good faith estimate flow		☐
Month 11	Year-end recall push before deductibles reset; review generation check per location		☐
Month 12	Annual plan review: capacity, payer mix, location results and next year's service-line priorities		☐

SECTION 12 · WHAT TO AVOID

Common mistakes

The patterns we see most often in this industry, and the fix for each. Be honest about which ones apply to you.

01 Advertising providers with no openings

Check capacity before every campaign and move budget to providers and locations that need patients.

- [ ] We do this today

02 Retargeting with health data

Google and Meta both limit it and it creates HIPAA risk. Build campaigns on search intent, location and broad audiences.

- [ ] We do this today

03 Replying to reviews with details

Never confirm the reviewer is a patient. Thank them, cite privacy rules, and give a direct number.

- [ ] We do this today

04 Burying insurance information

Publish a current list of accepted plans on every location page and keep it updated.

- [ ] We do this today

05 Ignoring the recall list

Work overdue patients every month. They cost less to book than any new lead.

- [ ] We do this today

06 Treating every location the same

Track map rankings, reviews, competitors and bookings for each location separately.

- [ ] We do this today

SECTION 13 · STARTING FROM SCRATCH

Quick start

If you only have a few hours a week, do these in order.

DONE	WHEN	TASK
☐	**Week 1**	Write the business snapshot with capacity, the three personas and your positioning statement.
☐	**Week 2**	Audit every location and practitioner Google Business Profile; fix duplicates, hours, categories and booking links.
☐	**Week 3**	Run a tracking audit with your web vendor and remove anything that sends patient information without a BAA.
☐	**Week 4**	Set up a review request for every patient and a response policy that never confirms patient status.
☐	**Month 2**	Build service-line pages for your top three lines and launch Google search ads on them.
☐	**Month 3**	Run the first reactivation campaign and start the weekly dashboard.
☐	**Quarter 2**	Add SEO content, provider videos and a referral outreach routine; move budget based on cost per booked new patient.
☐	**Year 1**	Review the full plan against capacity, payer mix and location results, and set next year's priorities.

NOTES

You have the plan. Want a team to run it with you?

MaaS by CodeSM is the outsourced marketing team for independent and multi-location medical practices: primary care, specialty, urgent care, and dental and orthodontic offices. One team for strategy, creative, paid media, SEO, web and reporting, without hiring a department.

01

A marketing audit

We review your listings, website, reviews, ads and reporting and show you where leads are slipping.

02

See where you stand

We compare your search visibility, reviews and ads with the competitors your customers actually consider.

03

A 90-day plan

You leave with a prioritized 90-day plan: channels, budget, content and KPIs.

04

Or we run it with you

Strategy, creative, paid media, SEO, web and reporting from one outsourced marketing team.

Book a call

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