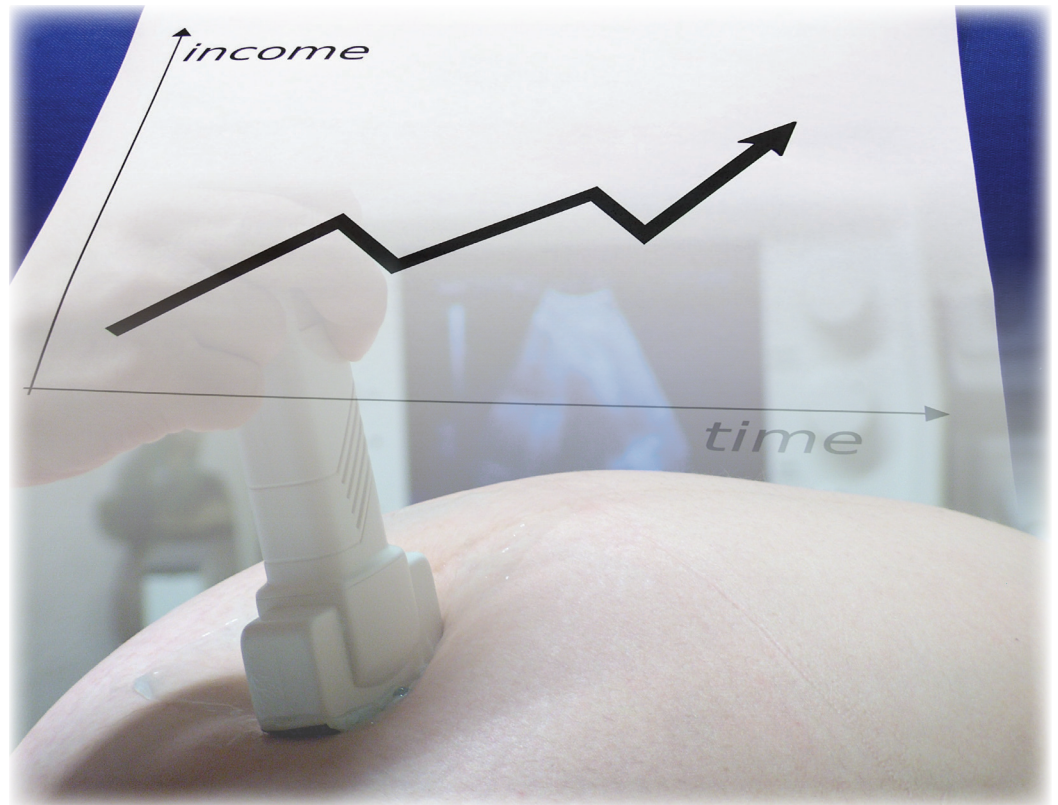


# Sample Action Plan

## Z Mobile Imaging

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# Z Mobile Imaging

## Tactical Marketing Plan

**Purpose:** To greatly expand the income, market penetration and profitability of Z Mobile Imaging and to place the company. into the position of being able to open and penetrate new markets. (Once Z Mobile Imaging. is in the position to expand beyond the greater Los Angeles area, a new or revised tactical plan will be necessary. A model system will be created that will facilitate new market penetration).

**Tactics:** To build and manage a productive sales force that contacts prospective clients, and promotes, generates leads and closes new clients. Sales people will be supported with training and literature that will enable sales persons to generate leads and turn them into clients. Furthermore, promotional actions will be implemented to support the sales staff. This includes direct mailings, an improved website, participation in medical conferences, advertising in trade publications, e-mail campaigns, website optimization, publicity and joint ventures.

**Strategy:** Z Mobile Imaging's strategy is defined by the Master Letter. Z Mobile Imaging will separate itself from its competition by positioning the company as the mobile service that provides higher quality service, and more ethical remuneration to its clients. Surveys will be conducted that may alter our strategy, depending on the findings.

### Monthly Statistical Measures:

#### MAJOR STATISTICS:

- Revenue
- New clients

#### SUB STATISTICS:

- Clients closed
- Meetings with prospective clients
- Appointments made
- Leads generated
- Direct contacts made
- Responses from mailers
- Responses from website
- Responses from e-mailers
- Responses from ads
- Responses from events
- Mailers sent

## Operational targets

- 1) Decide on a budget for this marketing program. CEO, Operations Manager \_\_\_\_
- 2) Review this plan. Set expected dates for completion of each target. Operations Manager. Marketing Manager \_\_\_\_
- 3) Hold meetings at least once a month to review progress of this plan. Operations Manager, Marketing Manager \_\_\_\_
- 4) Create an organizational chart (organizing chart) based on the seven department concept (Executive, Communications, Sales, Marketing, Production, Quality Control, Finance). Define the functions of each department. Define "the product" of each department. Marketing Manager \_\_\_\_
- 5) Determine the organizational policies needed to help ensure a smooth running company and to enable the marketing and sales departments to achieve their goals. CEO, Operations Manager, Marketing Manager, \_\_\_\_
- 6) Write the organizational policies. Marketing Manager \_\_\_\_
- 7) Create an employee/contractor handbook. Operations Manager, Marketing Manager \_\_\_\_
- 8) Decide on a certain percentage of net sales to be set aside for advertising. CEO, Operations Manager \_\_\_\_
- 9) Hire support staff for the sales department when budget permits. Operations manager, Marketing Manager \_\_\_\_

## Retention/Referral Building

- 1) Create a client satisfaction survey. Marketing Manager \_\_\_\_
- 2) Distribute the client satisfaction survey to clients once a month in person. Speak with the office manager or doctor and find out how things are going. Thoroughly and efficiently solve any problems that come up. Operations Manager or individual directed by her. \_\_\_\_
- 3) Make sure the satisfaction survey asks if the doctor would be willing to provide a testimonial. Marketing Manager \_\_\_\_
- 4) Prepare a generic endorsement letter template that Marketing reps

can edit and send to clients for their approval. Marketing Manager \_\_\_\_\_

- 5) Ask those who are happy with services for referrals and if they would be willing to provide an endorsement letter to their colleagues. Marketing Reps \_\_\_\_\_
- 6) Prepare the endorsement letters to be signed and assemble to be mailed (all costs assumed by the company). Marketing Assistant \_\_\_\_\_
- 7) Get the endorsement letters signed and send. Marketing Reps \_\_\_\_\_
- 8) If satisfaction surveys are excellent or improve over time, use the findings in promotions. Marketing Manager \_\_\_\_\_
- 9) Contact clients who are willing to provide a testimonial. Set up an interview and write the testimonial. Send the written testimonial for their approval. Marketing Manager \_\_\_\_\_
- 10) Use testimonials in future promotions. Marketing Manager \_\_\_\_\_

## **Sales and Sales Management Targets**

### *Phase 1: Create a stable local sales force and get them producing*

- 1) The Marketing Manager is to be given full responsibility and authority for the following:
  - a) Conducting sales interviews and recommending new hires to the Operations Manager.
  - b) Training Marketing Reps in selling techniques and marketing to medical offices.
  - c) Managing Marketing Reps.
  - d) Disciplining and recommending termination of Marketing Reps.
  - e) Selecting and changing Marketing Reps' territories.
  - f) Demanding compliance to receiving reports on time and any other operational issues that relate to the sales force.
- 2) Hire Marketing Reps to cover the greater Los Angeles area. Assign each individual a territory. Marketing Manager \_\_\_\_\_
- 3) Train and get Marketing Reps producing. Marketing Manager \_\_\_\_\_
- 4) Continue to recruit to replace those who cannot produce. Marketing Manager \_\_\_\_\_

- 5) Train each Marketing Rep on how to present imaging services to office managers and doctors. Operations Manager, Marketing Manager \_\_\_\_
- 6) Train each person on the selling skills necessary to sell imaging services to doctors. Marketing Manager \_\_\_\_
- 7) Develop a sales report form to be completed by each Marketing Rep at the conclusion of each week. This sales form is to include details of each visit to medical offices made by Marketing Reps. The purpose of the form is to help the Marketing Manager evaluate, manage and improve each salesperson's effort, and to create and expand a database of medical practices that will be used for direct mailers and mass e-mailers. Marketing Manager \_\_\_\_
- 8) See to it that each Marketing Rep fills out and sends in their sales report form by the end of Friday each week. Marketing Manager \_\_\_\_
- 9) Create a series of backup mailers to be sent to prospective clients on a biweekly basis. Mailers can be sent both by e-mail and direct mail. Mailers will be comprised of sales letters, flyers, brochures and newsletters. Marketing Manager \_\_\_\_
- 10) Collect the weekly reports from Marketing Reps at the conclusion of each Friday. Review each report and meet either by phone or in person to discuss the productivity of each Marketing Rep at the beginning of the following week. Marketing Manager \_\_\_\_
- 11) Develop policy guidelines for a sales supervisor. Marketing manager \_\_\_\_
- 12) Choose a sales rep to be trained as a sales supervisor. This individual will report to the marketing manager and will be trained and eventually manage the daily operations of the sales department. Marketing manager \_\_\_\_

*Phase 2: Once we have a stable producing sales staff and Operations is confident the company is ready to expand, we will hire and train Marketing Reps to cover territories in other geographic areas.*

### **Promotional tools**

- 1) Create a master letter that will be used as a guide to develop all other promotion. Marketing Manager \_\_\_\_
- 2) Create a promotional brochure that can be handed out by Marketing Reps, bulk mailed to a prospect list and sent with letters or other promotion to potential clients. Marketing Manager \_\_\_\_

- 3) Revise the blue service brochure as needed. Marketing Manager \_\_\_\_\_

## **Website**

- 1) Review the website and present a list of recommended changes to Operations. Marketing Manager \_\_\_\_\_
- 2) Establish a relationship with the web designer. Marketing Manager \_\_\_\_\_
- 3) Make the approved changes to the website. Marketing Manager \_\_\_\_\_
- 4) Upon approval of the changes, see to it that the changes are uploaded to the website. Marketing Manager \_\_\_\_\_
- 5) Optimize the website. Marketing Manager \_\_\_\_\_
- 6) Promote the website to online sources including directories and through medically related Internet resources. Send online news releases and register with online news services. Marketing Manager \_\_\_\_\_

## **Direct mail**

- 1) Compile a database of contacts made by Marketing Reps of all medical offices visited that may have at least some interest in our services. Marketing Manager \_\_\_\_\_
- 2) Send a minimum of 2 mailer per month to contacts on the list. Mailers can be sales letters, postcards, brochures, surveys or newsletters. Marketing Manager \_\_\_\_\_
- 3) Provide leads generated to Marketing Reps. Marketing Manager \_\_\_\_\_
- 4) Contact all leads within 1 business day to set an appointment. Marketing Reps \_\_\_\_\_

## **Emailers**

- 1) Ask those whom you contact if they would like us to send them additional information via e-mail. Collect their email addresses. Marketing Reps. \_\_\_\_\_
- 2) Compile an e-mail database of medical offices willing to accept

e-mails concerning our services. Marketing Manager. \_\_\_\_

- 3) Send a minimum of two e-mailers a month to contacts on the list. Mailers can be sales letters, testimonials, newsletters or promotions. Marketing Manager \_\_\_\_
- 4) Provide leads generated to marketing reps. Marketing Manager \_\_\_\_
- 5) Contact all leads within 1 business day to set appointments. Marketing Reps \_\_\_\_

### **Medical Conferences**

- 1) Make a list of conferences taking place in the greater Los Angeles area that target physician specialties we market to. Evaluate each and determine which we should attend, purchase a booth and/or advertise to. Make recommendations. Marketing Manager \_\_\_\_
- 2) Decide whether to allocate money to participate in conferences recommended by the Marketing Manager. CEO, Operations Manager. \_\_\_\_
- 3) If we decide to purchase a booth at events, design the booth and choose the promotion that will be given out and given away. CEO, Operations Manager, Marketing Manager \_\_\_\_
- 4) Make sure deadlines are met. Staff (including Marketing Reps) and run our participation in each event. Marketing Manager \_\_\_\_
- 5) Promote our participation in events to our database. Marketing Manager \_\_\_\_

### **Ads**

- 1) Create a generic ad that can be used in medical publications. Marketing Manager \_\_\_\_
- 2) Research publications read by the different specialists we service. Get rate cards and propose where we should advertise. Marketing Manager \_\_\_\_
- 3) Place ads based on the budget. Marketing Manager \_\_\_\_



## Publicity

- 1) Write news releases that would be of interest to physicians within the key specialties. Send them to trade publications and websites that target key physician specialties. Marketing Manager \_\_\_\_
- 2) Continue writing and sending news releases on an ongoing basis. Marketing manager \_\_\_\_

## Joint Ventures

- 1) Discuss establishing joint venture relationships that can lead to sales expansion. Consider medical billing companies, pharmaceutical companies, medical supply companies, etc. CEO, Operations Manager, Marketing Manager \_\_\_\_
- 2) Create an action plan based on decisions made and implement it. Marketing Manager \_\_\_\_