STRETCHLEARN · WORKBOOK

Marketing for Healthcare Practices — Workbook

This workbook turns the course into action for your specific practice. Work through one section per module, completing the exercises, worksheets, and checklists with your real numbers and vendors. By the end you will have an audited vendor stack, an optimized local presence, a running review program, a compliant ad plan, and a retention system you can measure.

The Compliance-First Marketing Foundation

Establish what HIPAA permits, audit your vendor stack for BAAs, and stand up the metrics that prove ROI.

Exercise: Classify Your Planned Communications

List five marketing messages you currently send or want to send. For each, decide whether it is general advertising, a permitted treatment communication, or marketing that uses PHI and needs authorization. Justify each call.

- Which of your messages rely on someone being a patient or having a condition to decide who receives them?
- Which messages qualify as treatment reminders (appointment, recare, refill) and are therefore permitted?
- For any message that uses PHI to target, would you obtain written authorization or change the message to avoid PHI?
- Where is your riskiest current communication, and how will you fix it this week?

Worksheet: Vendor BAA Audit

List every marketing and patient-communication tool you use. Record whether each touches PHI, whether the vendor signs a BAA, whether you have one on file, and the action needed. Fill the status and action columns yourself.

Tool or vendor name

Function (email, SMS, forms, scheduling, analytics, ads)

Does it touch PHI? (yes/no)

Vendor offers a BAA? (yes/no)

Signed BAA on file? (yes/no)

Action needed (sign / replace / no action)

Owner and due date

Worksheet: Core Metrics Baseline

Enter your current numbers per channel so you have a starting baseline. Leave every calculated cell (CPL, CPA, LTV, ROMS) blank and compute it yourself, then revisit monthly.

Channel name

Monthly spend (dollars)

Leads or inquiries

New patients acquired

Cost per lead (calculate)

Cost per acquired patient (calculate)

Average patient lifetime value (calculate)

Return on marketing spend (calculate)

Checklist: Foundation Readiness

[ ] Listed all communications and classified each as advertising, treatment, or PHI-marketing
[ ] Completed the vendor BAA audit and flagged every tool without a required BAA
[ ] Replaced or scheduled replacement of any PHI-handling tool lacking a BAA
[ ] Removed tracking pixels and analytics from condition-specific and patient-portal pages
[ ] Created a single metrics spreadsheet with CPL, CPA, LTV, and ROMS columns
[ ] Stored all signed BAAs in one folder with an annual review date

Local SEO and Google Business Profile

Optimize your Google Business Profile, fix NAP consistency, and build service and content pages that rank.

Checklist: Google Business Profile Optimization

[ ] Selected the most specific primary category and added relevant secondary categories
[ ] Completed hours, services with descriptions, insurance accepted, and appointment URL
[ ] Uploaded real photos of the exterior, interior, and team
[ ] Wrote a description naming the city and core services
[ ] Scheduled a weekly post and answered the Q and A section
[ ] Verified NAP matches the website and all major listings exactly

Worksheet: Citation and NAP Audit

List the directories where your practice should appear. Record the exact NAP shown on each and whether it matches your canonical NAP. Mark corrections needed yourself; do not assume any are already fixed.

Directory or platform name

Listed business name

Listed address

Listed phone number

Matches canonical NAP? (yes/no)

Duplicate listing found? (yes/no)

Correction action and owner

Exercise: Build Your Patient Question Content Map

Interview your front desk for the questions patients ask most. Turn the top questions into a prioritized content plan, one page per question, each linked to a service page and a booking call to action.

• What are the 15 questions your front desk answers most often?

• Which of those have clear search demand based on Google autocomplete and People also ask?

• Which clinician will be the named author or reviewer for each page?

• What is the internal link and call to action for each page?

Checklist: On-Site Local SEO

[ ] Created a dedicated page for each major service rather than one thin page
[ ] Added MedicalClinic, Dentist, or LocalBusiness schema with NAP and hours
[ ] Placed full NAP and an embedded map in the footer of every page
[ ] Built a unique location page for each office if multi-location
[ ] Attributed health content to named providers with credentials
[ ] Added a medically reviewed by line and a refresh date to each health page

Reviews and Reputation Management

Stand up a consistent, compliant review-generation engine and a safe response process.

Worksheet: Review Baseline by Platform

Record your current review counts and ratings on each platform so you can track growth. Leave the gap and target columns for you to set; do not pre-fill targets.

Platform (Google, Healthgrades, Vitals, Yelp)

Current review count

Current average star rating

Reviews added in the last 90 days

Priority for this practice (high/medium/low)

90-day review target (set yourself)

Gap to target (calculate)

Exercise: Design Your Review Request Flow

Map the exact moment, channel, message, and tool for requesting reviews after a visit, ensuring it runs through a BAA-covered platform and never offers payment.

• At what point after the visit will the request fire, and through which channel?

• Which BAA-covered platform will send it, and is consent captured at intake?

• What is the exact message wording, and does it avoid disclosing condition or treatment?

• How will the front desk prime patients to expect the request?

Checklist: Review Compliance Guardrails

[ ] Confirmed no payment, discount, or incentive is offered for reviews
[ ] Verified the review tool has a signed BAA before uploading any contacts
[ ] Removed any review gating that hides unhappy patients from public sites
[ ] Drafted a generic positive-review reply that names no procedure or condition
[ ] Drafted a negative-review reply that does not confirm the person is a patient
[ ] Set a 48-hour response standard for all new reviews

Worksheet: Negative Review Response Log

When a negative review arrives, log it here to track resolution and root cause. Keep replies PHI-safe; record only non-identifying internal notes.

Date received and platform

Star rating

Public reply posted? (yes/no) and date

Moved offline? (yes/no)

Root cause identified (internal, non-PHI note)

Process fix applied

Status (open/resolved)

Paid Ads and Patient Retention

Launch compliant Google Ads, build a recall and reactivation program, and assemble the integrated annual plan.

Worksheet: Google Ads Campaign Plan

Plan one tightly themed campaign per service line. Enter targeting, keywords, and budget. Leave the projected CPA and break-even columns blank to calculate against your LTV.

Campaign name (service line)

Target radius (miles)

Core intent keywords and match types

Negative keywords

Landing page URL

Monthly budget (dollars)

Projected cost per acquired patient (calculate)

Break-even check against LTV (calculate)

Checklist: PHI-Safe Conversion Tracking

[ ] Confirmed no PHI is ever sent to Google Ads or Google Analytics
[ ] Set up call conversions using duration thresholds rather than recordings of PHI
[ ] Fired booking conversions on a confirmation page with no patient details in the URL
[ ] Removed standard pixels from patient-portal and condition-specific pages
[ ] Limited any offline conversion import to a conversion event with no diagnosis data
[ ] Added negative keywords for jobs, salary, school, and free

Exercise: Build the Recall and Reactivation Sequence

Design the automated lifecycle that keeps patients returning, using only permitted treatment communications through a BAA-covered platform.

- What is the timing and channel for each recall step (for example text at 6 months, email at 7, call task at 8)?
- How will you segment lapsed patients (for example no visit in 9 to 18 months) from your practice management system?
- What does each message say while keeping sensitive details out of subject lines?
- How will you honor opt-outs and TCPA consent for text messaging?

Worksheet: Integrated Annual Budget and Cadence

Allocate your monthly budget across the four channels and set your review rhythm. Leave the percent-of-total and projected-return cells empty to calculate yourself.

Channel (ads, reviews, local SEO, retention)

Monthly budget (dollars)

Percent of total budget (calculate)

Primary metric tracked

Review cadence (weekly/monthly/quarterly)

Owner

Projected monthly return (calculate)

Your Action Plan

1. Complete the vendor BAA audit and replace any PHI-handling tool that will not sign a BAA
2. Remove tracking pixels and analytics from condition-specific and patient-portal pages
3. Fully optimize your Google Business Profile and fix every NAP inconsistency across directories
4. Build a dedicated page for each major service plus your top patient-question content pages
5. Turn on an automated, BAA-covered review request that fires within 24 hours of every visit
6. Write and save PHI-safe reply templates for positive and negative reviews with a 48-hour standard
7. Launch one tightly themed Google Ads campaign with PHI-safe conversion tracking
8. Activate a recall and reactivation email and text sequence through a BAA-covered platform
9. Stand up the monthly metrics spreadsheet and reallocate budget toward the best ROMS
10. Set the weekly, monthly, quarterly, and annual review cadence and assign owners