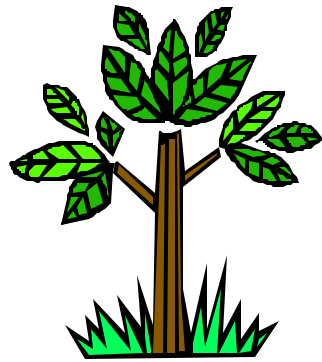


**SAMPLE**  
Fictitious Property



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## **Marketing Plan**

*prepared by:*



# Outline

- Summary/Situation Analysis
- Program Objectives/Goals
- Target Market Summary
  - Geographic, Demographic
  - Influencer Profile
  - Referral Sources/Competition
- SWOT Analysis
- Strategies/Tactics
- Budgets
- Marketing Events/Advertising



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# Summary/Situation Analysis

- The census at the Green Leaf campus, although growing to capacity is not reflecting the correct payer mix of Medicare and Medical Assistance in the skilled nursing unit. This is due to accepting medical assistance during the St. Patrick's transfer to the CPTB (similar to UPMC) network to retain a stable relationship.
- A new Marketing/Admissions Director is in place as of March, 2006. A relationship marketing program is currently being implemented to increase professional referrals. At this point, Green Leaf is generally contacted as the "third" choice among social workers and discharge planners. No relationship currently exists with the competitors in immediate area.
- Green Leaf has been in the community for many years but is virtually unknown or has a "less than respectful" reputation. This is primarily due to the lack of community awareness and Green Leaf's involvement in community activities.



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# Objectives/Goal

- I. Build Green Leaf Name Recognition in Community and among referral sources. Become #1 choice among referral sources when assisted living or skilled services are needed.
- II. Focus on relationship marketing techniques, internal tracking processes and develop/implement marketing ideas to increase professional referrals. Reach and maintain census of 73 (95%) by end of 2007.
- III. Develop plan and timeline to improve conversion rate in census. Implement an A, B, C Lead management program.
- IV. Develop campaign/program to build Green Leaf brand consisting of (but not limited to) special events and relationship-building tactics.



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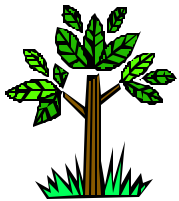
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# Target Market Summary

- The Census analysis of the 20 mile-radius of the facility area indicate a large concentration of individuals over 65 years of age (48%). This target area will include a cross over into two adjoining counties.
- Demographics include 81% Caucasian; 19% African American, 57% of whom live alone and 36% living with others (family members). The age breakdown of seniors is 60-69 (36%), 70-79 (25%), 80-84 (34%), and 90+ (5%).
- Marketing and community advertising will focus on the influencer. (See next slide for profile)



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# Target Audience (Influencer)

## Influencer Profile

- ✓ Adult child of the prospective resident
- ✓ 45 – 70 years of age
- ✓ Married with children, lives nearby
- ✓ Currently provides some assistance to parent
- ✓ Search is prompted by an incident or recommended by healthcare professional
- ✓ Usually on a schedule – most often come to us in a crisis mode

## Influencer Needs

- ✓ Meeting the needs of their parents
- ✓ Peace of mind/Relief from guilt
- ✓ Location/convenience
- ✓ Time efficiency
- ✓ Good value
- ✓ Quality of life



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# Key Referral Sources

## Hospitals/Rehabs

- St. Patrick's Hospital
- Simpson Valley Hospital
- HealthSouth (Allentown)
- LifeCare
- Autumnside Hospital
- Macy Hospital
- Western Hospital
- Presley Hospital
- West Regional Hospital
- Plate Hills Sans Hospital

## Competitors

- Crystal Lake's Personal Care Home
- Dubios Skilled Nursing Facility
- Sunrise Assisted Living
- Senior Cliff Residence
- Sentale Place
- Belaire Nursing Center



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# S.W.O.T. Analysis

## I. Strengths

- Competitive Pricing/VA Program Special Billing
- In-House Pharmacy
- Business District/Country Feel
- Smaller ALF Facility (48 Beds) than competition
- Privately owned/no “corporate entity”

## II. Weaknesses

- No transportation
- 80% Shared Bathrooms in ALF
- No FT Registered Nurse
- Limited Marketing Budget
- Highly Competitive Market



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# S.W.O.T. Analysis

## III. Opportunities

- Since there are few memory care facilities nearby, we are considering an Alzheimer wing in 2008.
- New discharge planner at local hospital – need to build relationship.
- New rehab center at West Regional Hospital.

## IV. Threats

- Lack of community awareness allows new constructed ALF (competitor located 5 miles away) an advantage in the marketplace
- Major competitor may open Alzheimer Facility in 2007
- New CCRC (Rosewood) under construction in nearby Allentown.



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# Strategies/Tactics

## I. Build Green Leaf Name Recognition in Community and among referral sources

- Review Community/Professional Reputation. Review Relationship Marketing with Referral Sources.
- Convey the Green Leaf Mission Statement and our USP that we are part of a regional network of healthcare facilities created to provide a broad range of services in selected markets, high quality, cost effective.
- Produce and place directional signage (in addition to the current billboard) where appropriate to build awareness of location.
- Review status of USP (Unique Selling Proposition)\*, timeline and strategy to launch.

\*currently considering a pulmonary unit.



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# Strategies/Tactics

## I. Build Green Leaf Name Recognition in Community and among referral sources (continued)

- Target Social Workers, Discharge Planners, Physicians, Assisted Living, Competitors, etc. and develop communication programs to each group.
- Develop program to target community businesses in order to build name recognition (e.g., banks, real estate/insurance offices, etc.).
- Schedule community-targeted educational series to be held at Green Leaf facility to promote tours and recognition.
- Schedule Open House/Family Night with community speaker.
- Address challenges and conduct rated-ranking exercise to prioritize.



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# Strategies/Tactics

II. Train new marketing/admissions director on relationship marketing techniques, Green Leaf reports, internal processes and develop/implement marketing ideas to increase professional referrals.

- Review current procedures and re-align if necessary to streamline admissions process (this process should be marketed to the referral sources as efficient and fast).
- Review all Green Leaf monthly/weekly reports and develop process (automate and computerize if possible) to complete on timely basis. Closely monitor results of marketing efforts – include bi-monthly email communication to stakeholders.
- Schedule and attend all marketing related events (community and professional) to introduce new admissions/marketing director.
- Develop and implement relationship marketing program targeting all referral sources.



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# Strategies/Tactics

II. Train new marketing/admissions director on relationship marketing techniques, Green Leaf reports, internal processes and develop/implement marketing ideas to increase professional referrals.  
(continued)

## **Professional Referral Sources (80/20 Rule)**

- Using resident files, identify doctors, medical practices, home care agencies, etc. (Lunch Meetings, Presentations, relationship building, etc.)
- Identify and build relationships with hospital social workers/staffs

## **Competitive Analysis**

- Identify and visit competitors; develop relationships where feasible



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# Strategies/Tactics

II. Train new marketing/admissions director on relationship marketing techniques, Green Leaf reports, internal processes and develop implement marketing ideas to increase professional referrals. (continued)

## **Community Awareness/Involvement**

- Associate Green Leaf name with Special Events, Open Houses, Healthcare Fairs, Senior Expos, etc.
- Identify local groups, churches, senior groups, etc. and offer residence for meeting/event; Using resident files, identify church groups, local interests, etc. (have resident sponsor card party, etc.)
- Build Green Leaf reputation as “source” for Aging issues through seminars/lectures (Allstate Insurance’s LTC Insurance, Financial Planning, etc.); Target the “Baby Boomer” generation with relevant issues.
- Educate community about senior living options.
- Develop “co-op” advertising program opportunities with agencies on aging, senior events, concerts, etc.)



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# Strategies/Tactics

II. Train new marketing/admissions director on relationship marketing techniques, Green Leaf reports, internal processes and develop/implement marketing ideas to increase professional referrals.  
(continued)

## **Activity/Community Events**

- Work with Activity Department to sponsor community events at the residence. Use opportunity to promote Green Leaf's focus on activity programs for seniors.
- Hold holiday events for community such as family luncheon/dinner (extra revenue and promotes tours)

## **Public Relations**

- Develop a Public Relations program (free advertising); build relationships with the media, provide steady stream of press releases to media on all relevant issues.



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# Strategies/Tactics

## III. Re-align SNF Census to meet financial goals

- Review goals vs. current payer numbers
- Develop game plan for MA reduction
- Develop timeline and projections

<b>PAYOR SOURCE</b>	<b>2006 BUDGET</b>	<b>ACTUAL (Average)*</b>
Private Pay	12	9
Medicare	18	10
Medicaid	78	93
Managed Care	8	7
Other Contracts	2	2
<b>TOTALS</b>	<b>118</b>	<b>121</b>



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# 2007 Budgets

**Marketing**

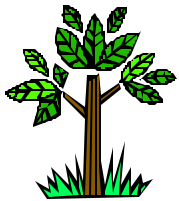
**\$300/Month**

*-Activity/Community Events*

**Advertising**

**\$400/Month**

*-Billboards, Newspaper ads/flyers/brochures*



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# External Marketing Tools/Tactics

## Marketing Tools

- Newly developed “*Green Leaf Tickets*”
- “*Did You Know*” single promotion cards
- Newly Designed “*Bed Availability Fax Sheets*”
- Newly designed “*Fax Sheets*”
- *Educational Seminar Promotional Sheets*
- Better utilization of *healthcare online network*
- Follow up letters

## Celebration Opportunities

- Social Worker Month (March)
- Pulmonary Rehabilitation Week (March 13-19)
- Physician’s Day (March 30)
- Public Health Week (April 4-10)
- Nurses Day (May 6)
- Nursing Home Week (May 8-14)



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# Critical Path

## Weeks of March 7 – March 14

- Formulate tour program/route, understand highlights, “model” rooms, activities program, new pulmonary unit (if established)
- Review staff, residents, utilize for tours, establish tour route; conduct mock tours (establish marketing group if not currently in place)
- Review all Green Leaf Reports, establish timeline and formats (include tracking system)
- Establish census re-alignment strategy, goals and timeline
- Develop plans to visit professional referrals, implement marketing communication efforts (breakfast, lunch meetings, etc.)

## Weeks of March 14 – March 28

- Review all current resident leads. Review and/or establish follow-up process
- Schedule (and attend) marketing networking events
- Review professional contacts (social workers, discharge planners, physicians, community contact opportunities, etc.) upcoming events, develop internal/external marketing efforts
- Develop directional signs; identify placement, call local authorities about signage legalities
- Review reputation/census barriers and conduct rated-ranking exercise to prioritize
- Review status of USP, develop timeline and promotional efforts



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# Critical Path

## Weeks of March 28 – April 4

- Develop plan, identify and schedule relationship marketing visits to all competitors in area.
- Get buy in from at least two competitive sources to share referral program
- Identify community event that Green Leaf can be involved with and begin process
- Schedule Educational Series of events at Green Leaf using Director of Nursing; Agency on Aging speaker, etc.
- Schedule at least one physician event (breakfast, etc.)

## Weeks of April 11 – May 30

- Develop 2007 Outreach calendar
  - Marketing Events
  - Ongoing Relationship Marketing program
- Develop Public Relations Program
- Contact all residents' medical professionals. Complete at least two outside lunches to professionals.
- Complete at least four professional tours
- Schedule four community events for May through August
- Develop process to “watch the back door”



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