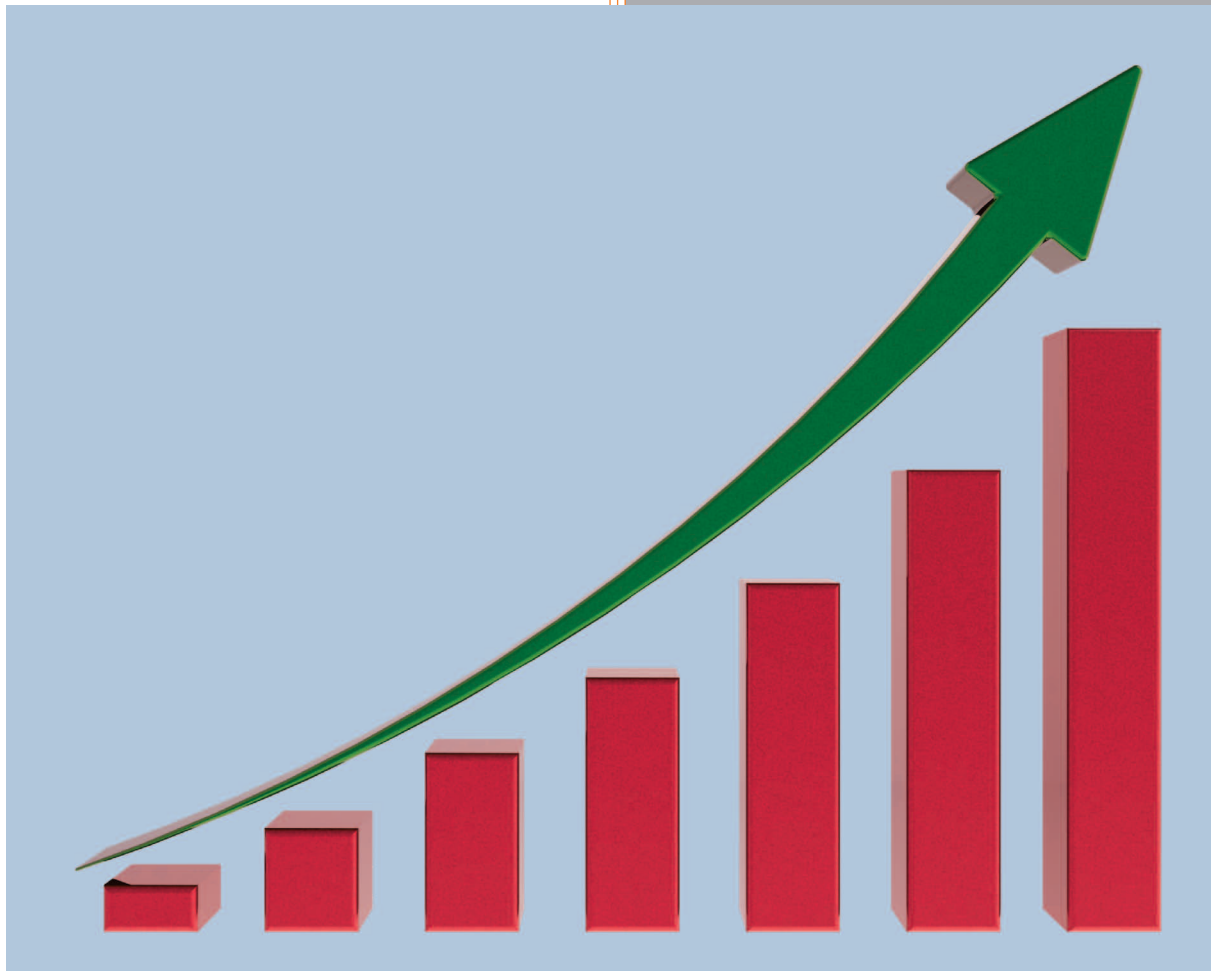


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# Growth Plan Worksheet



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**Notice:**

This information has been prepared for use in our business and may not be shared without giving acknowledgement to the author.

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# Growth Plan Worksheet

The book “What Patients Want” contains this detailed *Growth Plan Worksheet*, utilising the methods described in the book.

While not being a complete marketing plan, this is a practical check-box style worksheet that can be completed to suit the needs of an individual optometry practice.

Like the other resources and suggestions for the development of an optometry practice, the *Growth Plan Worksheet* will only be valuable if it is adopted.

There is also a form that has been used by the author as a *Plan for Attracting New Patients* in the *Resources* section of the book.

“Opportunity is missed by most people because it is dressed in overalls and looks like work.”  
Inventor & scientist Thomas Edison

Growth Plan Worksheet				
1: SITUATION ANALYSIS			Req	Done
• <b>Laws &amp; Regulations:</b>			<input type="checkbox"/>	<input type="checkbox"/>
• <b>Economic Conditions:</b>	Interest Rate	%	<input type="checkbox"/>	<input type="checkbox"/>
	Inflation Rate	%		
	Wage Increases	%		
• <b>Availability of Technology:</b>			<input type="checkbox"/>	<input type="checkbox"/>
• <b>Availability of Media:</b>	<input type="checkbox"/> Newspapers	<input type="checkbox"/> Directories	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Television	<input type="checkbox"/> Magazines		
	<input type="checkbox"/> Radio	<input type="checkbox"/> Letter Drop		
• <b>Trends in Consumer Demand:</b>			<input type="checkbox"/>	<input type="checkbox"/>
Products or Services becoming more popular . . .				
Products or Services becoming less popular . . .				
• <b>Support Offered by Suppliers:</b>			<input type="checkbox"/>	<input type="checkbox"/>
Marketing & advertising co-op subsidies . . .				
Staff training support . . .				
Specialty products & exclusive agencies . . .				

*Growth Plan Worksheet*  
(A Hanks)

Plan for Attracting New Patients			
Practice Location or Branch:			
Mentor:			
<b>FOUNDATIONS:</b>			
Start Date:			
	Required	Completed	Details / Comment
Introduce chapter "Attracting New Patients" (see )	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Identify the key contact for the project	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>1 - STANDARD PATIENT LETTERS:</b>			
	Required	Completed	Details / Comment
Change the standard Recall Letter to include social proof	<input type="checkbox"/>	<input type="checkbox"/>	
Change the patient Survey Letter to invite referrals	<input type="checkbox"/>	<input type="checkbox"/>	
<b>2 - ONGOING PATIENT CONTACT:</b>			
	Required	Completed	Details / Comment
Introduce the process for producing 12 month Service Recalls	<input type="checkbox"/>	<input type="checkbox"/>	
Introduce the process for making Progressive Lens follow-up calls	<input type="checkbox"/>	<input type="checkbox"/>	
<b>3 - ADVERTISING:</b>			
	Required	Completed	Details / Comment
Full review of the current schedule of ongoing advertising	<input type="checkbox"/>	<input type="checkbox"/>	Spend pa: \$ _____ % Sales pa: \$ _____ %
Introduce the process for making Progressive Lens follow-up calls	<input type="checkbox"/>	<input type="checkbox"/>	
<b>4 - SPECTACLE DELIVERIES:</b>			
	Required	Completed	Details / Comment
Design contents of bag to be given with each new spectacle delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Thanks for recommending us <input type="checkbox"/> Adaptation & guarantee <input type="checkbox"/> Cleaning cloth <input type="checkbox"/> Cleaning spray <input type="checkbox"/> other:
Audit that contents of spectacle delivery bag is happening	<input type="checkbox"/>	<input type="checkbox"/>	

*Plan for Attracting New Patients*  
(A Hanks)

# Growth Plan Worksheet

1: SITUATION ANALYSIS			Req	Done
<ul style="list-style-type: none"> <li><b>Laws &amp; Regulations:</b></li> </ul>			<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><b>Economic Conditions:</b></li> </ul>	Interest Rate	%	<input type="checkbox"/>	<input type="checkbox"/>
	Inflation Rate	%		
	Wage Increases	%		
<ul style="list-style-type: none"> <li><b>Availability of Technology:</b></li> </ul>			<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><b>Availability of Media:</b></li> </ul>	<input type="checkbox"/> Newspapers	<input type="checkbox"/> Directories	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Television	<input type="checkbox"/> Magazines		
	<input type="checkbox"/> Radio	<input type="checkbox"/> Letter Drop		
<ul style="list-style-type: none"> <li><b>Trends in Consumer Demand:</b></li> </ul> <p><i>Products or Services becoming more popular . . .</i></p>  <p><i>Products or Services becoming less popular . . .</i></p>			<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><b>Support Offered by Suppliers:</b></li> </ul> <p><i>Marketing &amp; advertising co-op subsidies . . .</i></p>  <p><i>Staff training support . . .</i></p>  <p><i>Specialty products &amp; exclusive agencies . . .</i></p>			<input type="checkbox"/>	<input type="checkbox"/>

**SITUATION ANALYSIS** *(Continued)*

**Req Done**

• **Special Experience Available in the Practice:**

*Owner(s) . . .*

*Practice Staff . . .*

• **SWOT Analysis:**

*Strengths . . .*

- Reputation
- Equipment
- Training of staff
- Location
- Prices
- 
- 
- 
- 

*Opportunities . . .*

- Product ranges
- Competitors
- Regulation changes
- Current economy
- Health insurance
- 
- 
- 
- 

*Weaknesses . . .*

- Reputation
- Equipment
- Training of staff
- Location
- Prices
- 
- 
- 
- 

*Threats . . .*

- Product ranges
- Competitors
- Regulation changes
- Current economy
- Health insurance
- 
- 
- 
-

2: SET OBJECTIVES		Req	Done
<ul style="list-style-type: none"> <li>• <b>Objective 1:</b> <i>Specific . . .</i></li> </ul> <p><i>How it will be measured . . .</i></p>	<input type="checkbox"/> Achievable <input type="checkbox"/> Realistic <input type="checkbox"/> Timed	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• <b>Objective 2:</b> <i>Specific . . .</i></li> </ul> <p><i>How it will be measured . . .</i></p>	<input type="checkbox"/> Achievable <input type="checkbox"/> Realistic <input type="checkbox"/> Timed	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• <b>Objective 3:</b> <i>Specific . . .</i></li> </ul> <p><i>How it will be measured . . .</i></p>	<input type="checkbox"/> Achievable <input type="checkbox"/> Realistic <input type="checkbox"/> Timed	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• <b>Objective 4:</b> <i>Specific . . .</i></li> </ul> <p><i>How it will be measured . . .</i></p>	<input type="checkbox"/> Achievable <input type="checkbox"/> Realistic <input type="checkbox"/> Timed	<input type="checkbox"/>	<input type="checkbox"/>

3: STRATEGIES	Req	Done
<ul style="list-style-type: none"> <li> <b>Strategic Gap Analysis 1:</b>  <i>Patient segment . . .</i>   <i>How it will be targeted . . .</i>   <i>Positioning . . .</i>  <input type="checkbox"/> Technology <input type="checkbox"/> Health-care <input type="checkbox"/> Fashion <input type="checkbox"/> Specialty <input type="checkbox"/> Exclusive <input type="checkbox"/> Price - Low/High </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li> <b>Strategic Gap Analysis 2:</b>  <i>Patient segment . . .</i>   <i>How it will be targeted . . .</i>   <i>Positioning . . .</i>  <input type="checkbox"/> Technology <input type="checkbox"/> Health-care <input type="checkbox"/> Fashion <input type="checkbox"/> Specialty <input type="checkbox"/> Exclusive <input type="checkbox"/> Price - Low/High </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li> <b>Strategic Gap Analysis 3:</b>  <i>Patient segment . . .</i>   <i>How it will be targeted . . .</i>   <i>Positioning . . .</i>  <input type="checkbox"/> Technology <input type="checkbox"/> Health-care <input type="checkbox"/> Fashion <input type="checkbox"/> Specialty <input type="checkbox"/> Exclusive <input type="checkbox"/> Price - Low/High </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li> <b>Strategic Gap Analysis 4:</b>  <i>Patient segment . . .</i>   <i>How it will be targeted . . .</i>   <i>Positioning . . .</i>  <input type="checkbox"/> Technology <input type="checkbox"/> Health-care <input type="checkbox"/> Fashion <input type="checkbox"/> Specialty <input type="checkbox"/> Exclusive <input type="checkbox"/> Price - Low/High </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

4: MARKETING TACTICS		Req	Done
<ul style="list-style-type: none"> <li><b>Pricing Review:</b></li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>
<i>Consultations . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<i>Ancillary Tests (fields, DRI, etc) . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<i>Spectacle Lenses . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<i>Spectacle Frames . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<i>Contact Lenses . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<i>Sunglasses (non-Rx) . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<i>Accessories (solutions, magnifiers, etc) . . .</i>	<input type="checkbox"/> ↑ <input type="checkbox"/> ↓		
<ul style="list-style-type: none"> <li><b>Products or Services Offered Outside the Practice:</b></li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>
<i>Practice Website . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		
<i>Practice On-Line Sales . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		
<i>Visiting Branch Practice . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		
<i>Domicillary &amp; Nursing Home Visits . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		
<i>Eye Safety Workplace Visits . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		
<i>Teaching or Industry Consulting . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		
<i>Other . . .</i>	<input type="checkbox"/> Establish <input type="checkbox"/> Expand		

MARKETING TACTICS <i>(Continued)</i>		Req	Done	
<ul style="list-style-type: none"> <li>• <b>Service &amp; Product Bundling:</b>  <i>Services . . .</i>   <i>Products . . .</i></li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>Staff Training:</b>  <i>External programs . . .</i>   <i>In-practice training . . .</i>   <i>Product training . . .</i></li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• <b>Advertising:</b>  <i>Newspapers / Magazines . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Increase</li> </ul> </li>   <li><i>Radio / Television . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Increase</li> </ul> </li>   <li><i>Directional / Yellow Pages . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Increase</li> </ul> </li>   <li><i>On-Line / Search Engines . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Increase</li> </ul> </li>   <li><i>Other . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Increase</li> </ul> </li> </ul>		<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop  <input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop  <input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop  <input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop	<input type="checkbox"/>	<input type="checkbox"/>



MARKETING TACTICS <i>(Continued)</i>			Req	Done
<b>• Relationship Building - Patients:</b>			<input type="checkbox"/>	<input type="checkbox"/>
<i>Patient newsletters . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Custom-printed brochures . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Follow-up phone calls . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Patient opinion surveys . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Welcome to our office letters . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>12 Month service letters . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Other . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<b>• Relationship Building - Doctors:</b>			<input type="checkbox"/>	<input type="checkbox"/>
<i>Standard vision reports to GP doctors . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Visit local doctors / referral sources . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>GP doctor referral pads . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Other . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		

MARKETING TACTICS <i>(Continued)</i>			Req	Done
<b>• Relationship Building - Other Referral Sources:</b>			<input type="checkbox"/>	<input type="checkbox"/>
<i>Standard vision reports to schools . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Offer vision talks for schools . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Offer vision talks for community groups . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Press releases for local media . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<i>Other . . .</i>	<input type="checkbox"/> Start <input type="checkbox"/> Increase	<input type="checkbox"/> Revise <input type="checkbox"/> Reduce/Stop		
<b>• Recall Reminders for Returning Patients:</b>			<input type="checkbox"/>	<input type="checkbox"/>
<i>Staff training on recall reinforcement . . .</i>		<input type="checkbox"/> Start <input type="checkbox"/> Reinforce		
<i>Content of recall letters . . .</i>		<input type="checkbox"/> Start <input type="checkbox"/> Revise		
<i>Frequency of recalls &amp; 2nd recalls . . .</i>		<input type="checkbox"/> Start <input type="checkbox"/> Revise		
<i>Recall case stickers . . .</i>		<input type="checkbox"/> Start <input type="checkbox"/> Revise		
<i>Other . . .</i>		<input type="checkbox"/> Start <input type="checkbox"/> Revise		

**MARKETING TACTICS** *(Continued)*

**Req Done**

• **Service Improvements:**

*Electronic appointment reminders (SMS) . . .*

Start

Reinforce

*Clear recommendations for every patient . . .*

Start

Reinforce

*Personal optometrist hand-overs to dispensing . . .*

Start

Reinforce

*Electronic delivery notification . . .*

Start

Reinforce

Other . . .

Start

Reinforce

• **Other Tactics:**

Describe . . .

5: CONTROLS		Req	Done
<ul style="list-style-type: none"> <li> <b>Marketing Budget: (Annual)</b> </li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>
Advertising .. Newspapers / Magazines	\$		
Advertising .. Radio / Television	\$		
Advertising .. Directional / Yellow Pages	\$		
Advertising .. On-line / Search engines	\$		
Brochures & Patient Information	\$		
Letterhead, business cards & staff name badges	\$		
Networking events	\$		
Newsletters .. Printing (less co-op subsidies)	\$		
Newsletters .. Distribution	\$		
Recalls .. Postage	\$		
Special Events / Style Shows	\$		
Sponsorships	\$		
Other / Contingency	\$		
Total Marketing Expense Budget	\$		
Total Budget as Share of Annual Practice Income	(Benchmark 4%)	%	
<ul style="list-style-type: none"> <li> <b>Practice Income Budget:</b> </li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>
January	\$		
February	\$		
March	\$		
April	\$		
May	\$		
June	\$		
Total 6 Mths Practice Budget & Share of Annual Income	\$	%	
July	\$		
August	\$		
September	\$		
October	\$		
November	\$		
December	\$		
Total Annual Practice Income Budget	\$		

CONTROLS <i>(Continued)</i>				Req	Done
<b>• Sales Proportions:</b>				<input type="checkbox"/>	<input type="checkbox"/>
<i>Consultations</i>	<i>(Benchmark 17%)</i>		%		
<i>Ancillary Tests (fields, DRI, etc)</i>	<i>(Benchmark 3%)</i>		%		
<i>Spectacle Lenses</i>	<i>(Benchmark 39%)</i>		%		
<i>Spectacle Frames</i>	<i>(Benchmark 27%)</i>		%		
<i>Sunglasses (non-Rx)</i>	<i>(Benchmark 2%)</i>		%		
<i>Contact Lenses</i>	<i>(Benchmark 9%)</i>		%		
<i>Accessories (solutions, magnifiers, etc)</i>	<i>(Benchmark 3%)</i>		%		
<i>Total</i>		100	%		
<b>• Practice Expenses Budget:</b>				<input type="checkbox"/>	<input type="checkbox"/>
<i>Cost of Goods Dispensed (COGS)</i>	<i>(Benchmark 34%)</i>	\$			
<i>Advertising</i>	<i>(Benchmark 3%)</i>	\$			
<i>Bank Charges (Fees, Card charges)</i>	<i>(Benchmark 1%)</i>	\$			
<i>Electricity</i>	<i>(Benchmark 1%)</i>	\$			
<i>Equipment (Leasing, Repairs, Maintenance)</i>	<i>(Benchmark 3%)</i>	\$			
<i>Insurance</i>	<i>(Benchmark 1%)</i>	\$			
<i>Occupancy Costs (Rent, Rental Outgoings)</i>	<i>(Benchmark 8%)</i>	\$			
<i>Postage &amp; Freight</i>	<i>(Benchmark 3%)</i>	\$			
<i>Printing &amp; Stationery</i>	<i>(Benchmark 2%)</i>	\$			
<i>Repairs &amp; Maintenance</i>	<i>(Benchmark 2%)</i>	\$			
<i>Staff Costs (Salaries, Bonuses) - incl owner's wage</i>	<i>(Benchmark 34%)</i>	\$			
<i>Telephone</i>	<i>(Benchmark 2%)</i>	\$			
<i>Travel &amp; Accommodation</i>	<i>(Benchmark 1%)</i>	\$			
<b>• Local Eyecare Market Share: <i>(Estimated sales proportions)</i></b>				<input type="checkbox"/>	<input type="checkbox"/>
<i>1: This Practice</i>			%		
<i>2: _____</i>			%		
<i>3: _____</i>			%		
<i>4: _____</i>			%		
<i>6: _____</i>			%		
<i>6: _____</i>			%		
<i>Total</i>		100	%		

CONTROLS <i>(Continued)</i>				Req	Done
<ul style="list-style-type: none"> <li><b>Benchmarking:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Industry group</li> <li><input type="checkbox"/> Gov't statistics</li> <li><input type="checkbox"/> Other . . .</li> <li><input type="checkbox"/> Buying group</li> <li><input type="checkbox"/> Historical data</li> <li><input type="checkbox"/> Marketing group</li> <li><input type="checkbox"/> Colleagues</li> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Revise</li> <li><input type="checkbox"/> Reinforce</li> </ul> </li> </ul>				<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><b>Leader Boards:</b> <ul style="list-style-type: none"> <li><i>Ancillary tests (Retinal imaging, etc) . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Revise</li> </ul> </li> <li><i>Level of discounting to patients . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Revise</li> </ul> </li> <li><i>Support of preferred suppliers . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Revise</li> </ul> </li> <li><i>Outstanding accounts (owed by patients) . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Revise</li> </ul> </li> <li><i>Other . . .</i> <ul style="list-style-type: none"> <li><input type="checkbox"/> Start</li> <li><input type="checkbox"/> Revise</li> </ul> </li> </ul> </li> </ul>				<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><b>Other Controls:</b> <ul style="list-style-type: none"> <li><i>Describe . . .</i></li> </ul> </li> </ul>				<input type="checkbox"/>	<input type="checkbox"/>