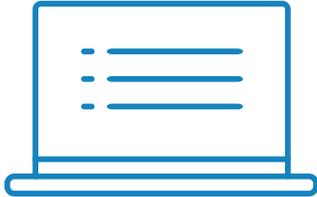




VIRTUAL MARKETING CHECKLIST



We understand transitioning your practice into a virtual setting can feel overwhelming and confusing. Whether you're taking the first step into the digital world or have held a few virtual appointments, this checklist holds Impact's top recommendations to set up your office for virtual success.

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- Invest in an online meeting platform. There are plenty of options for you to choose from based on your needs for online meetings and if you're planning on running webinars. Talk to your marketing strategist about the pros and cons of each.
 - Test the platform, get comfortable with it and become the expert in using the platform before meeting with clients and prospects.
 - Watch Impact's training on virtual communication from Decker Communications.
 - Digital Presence: Add language and call-to-actions on your website about your options for virtual appointments and make it easy to book right there.
 - Add these updates to your social media sites
 - Set up a virtual booking system so prospects can book appointments directly after webinars or client events. We suggest Calendly.
 - Define your virtual office and appointment workflow.
 - Outline your team's responsibilities for booking and communicating virtual appointments and follow through.
 - Review our "Virtual Appointment Workflow."
 - Host a virtual client advisory board meeting. Gain direct feedback from your top clients on how you're handling communication and reassurance to your clients during this crisis. Ask them for ideas on how you can reach more community members.
 - Host a webinar with your CAB members. Use this as an opportunity to get comfortable in the system and presenting content in a virtual format. Ask them for feedback on content to include or questions to ask the audience to create engagement.

- Client Email Announcement: Send an email out to all clients & prospects letting them know about your new virtual appointment offerings. Educate them on what to expect moving forward from your team and how they can get in touch with you.
- Host a webinar/virtual town hall for your clients only. This will show them you're invested in their education and want to take care of them first and foremost.
- Host a webinar for your prospect list. You already have the leads in your database, so take this opportunity and reengage through virtual education. Offer one every week and continue to drip on them.
- Continue to market to new leads. This could be through Facebook ads, radio, TV, etc. However you want to reach new prospects, it's important to maintain a marketing presence while being mindful of your budget.
- Host a virtual client appreciation event. Just because you can't engage in person, doesn't mean you can't appreciate your clients virtually. Try holding a virtual cooking class or wine tasting to stay in touch with your clients and show appreciation.
- Stay engaged with client appreciation processes. If you've been sending birthday & anniversary cards and gifts continue these touches as they'll go a long way during this time of need.
- Post valuable content on your social media accounts. With increased traffic and time spent on social media platforms, it's important to keep your brand in front of your clients and prospects. Avoid repeating articles and news stories and create valuable and engagement content for people to interact with.
- Send out a virtual calendar to all clients. This will let your clients know you're staying active and focused during this time and will encourage participating and referrals. Include upcoming town halls, webinars, radio shows, client events, etc.
- Radio/Podcasts: If you're on radio, your listeners might not be spending as much time in the car these days engaging with your content. Send emails and post on your social media platforms how they can still listen each week.

