

# BACK TO SCHOOL **PROMOTION GUIDE**



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OPTICAL

# Back to School PROMOTION GUIDE

Offering a Back to School promotion is a great way to reach pediatric patients and their families, especially during a busy purchasing season— and planning a seasonal promotion doesn’t have to be complicated!

Make sure an eye exam and a new pair of eyewear is on your patients’ back-to-school checklist by planning a promotion especially for them using Walman Optical’s step-by-step promotion guide.

6-8 WEEKS PRIOR TO PROMOTION				
REFERENCE PAGES 4-5				
Action Step	Task Manager	Start Date	Due Date	Note
Discuss promotional goals with lab rep.				
Set a budget and promotional sales goal.				
Determine your promotion details.				
Decide how to market your promotion.				
Create needed marketing materials.				

4-5 WEEKS PRIOR TO PROMOTION				
REFERENCE PAGE 5				
Action Step	Task Manager	Start Date	Due Date	Note
Educate staff on promotion details.				
Reach out to local organizations & businesses.				
Contact local media.				
Begin marketing your promotion.				

## 2-3 WEEKS PRIOR TO PROMOTION

REFERENCE PAGE 6

Action Step	Task Manager	Start Date	Due Date	Note
Mail flyers and/or postcards				
Call your top patients.				
Book exams for promotional period.				

## 1 WEEK PRIOR TO PROMOTION

REFERENCE PAGE 6

Action Step	Task Manager	Start Date	Due Date	Note
Display in-office materials.				
Host a pre-promotion staff meeting.				

## PROMOTIONAL PERIOD

REFERENCE PAGE 7

Action Step	Task Manager	Start Date	Due Date	Note
Measure your sales goal daily and weekly by employee.				
Celebrate reaching sales milestones.				

## POST-PROMOTION

REFERENCE PAGE 7

Action Step	Task Manager	Start Date	Due Date	Note
Determine promotion performance.				
Host a post-promotion meeting.				

### 6 - 8 WEEKS OUT

#### DISCUSS PROMOTIONAL GOALS WITH YOUR LAB REP.

What are you trying to achieve through your promotion? Promotions can increase your capture rate, promote awareness of your practice, or drive the usage of a particular product, depending on how they are designed. Talk with your lab or brand rep about your practice goals, and how they can help you set up a promotion. Labs and lens manufacturers might have their own seasonal promotions that you can pass through to patients for ease of planning and cost-savings.

#### SET A BUDGET, AND PROMOTIONAL SALES GOAL.

Set a budget for margin expenses, as well as the costs of marketing your promotion and the expense of any individual or group incentives you are offering staff for meeting sales goals. Be sure to review your marketing plan with your vendors as they may be able to contribute marketing materials, in-office merchandising, or offer co-op to help offset the costs to the office. A helpful way to determine a realistic budget is to set a sales goal for the promotion. By figuring out how many dollars in sales you will need to meet in order to achieve a profit, you will quickly find if your budget is too high or too low.

#### DETERMINE YOUR PROMOTION DETAILS.

Write out the specifics of your promotion: the start and end dates, which product is included, which patients qualify, and how it may or may not be combined with other offers, packages, or care plans. The more detailed you are now, the clearer your promotion will be for patients and your staff.

#### DECIDE HOW TO MARKET YOUR PROMOTION.

Marketing your promotion is a crucial step to ensuring the success of your efforts. There are many ways to market your promotion, including:

- Calling patients
- Postcards
- In-office counter cards and/or posters
- Email blasts
- Practice website
- Facebook events
- Twitter postings
- Newspaper and/or radio ads

Don't discount opportunities to cross-promote with other local businesses like clinics, boutiques. These joint efforts can reinforce your role as a local business and encourage loyalty from customers of both organizations.



### CREATE NEEDED MARKETING MATERIALS.

Six weeks in advance of your event you should create needed flyers, posters, and postcards. A graphic designer will charge about \$200 for the flyer alone, although a basic flyer can be done fairly simply on a home computer. Be sure your materials have a clean look, showing the dates and promotion details clearly. As it may take some time, you may want to begin labeling postcards or mailers now.

## 4 - 5 WEEKS OUT

### EDUCATE STAFF ON PROMOTION DETAILS.

Make sure your staff clearly understands the promotion details and parameters. Your lab or brand rep will be able to offer detailed information about any promoted product and fully train your staff on the important aspects of the technology.

### REACH OUT TO LOCAL ORGANIZATIONS & BUSINESSES.

A great way to generate traffic during your promotion is by teaming up with other local businesses in your area. Your partner businesses can hand out business cards and may be willing to advertise your promotion in their location for a period of time.

Also reach out to local schools, community organizations or health groups. See if school health offices or educators would be willing to distribute your practice information or an educational brochure with your contact information during vision screenings.

### CONTACT LOCAL MEDIA.

Begin implementing any outside advertising you may be executing, such as newspaper, posters or flyers around community, radio, or community church/organization bulletins. This type of advertising can be expensive, but can reach a wide market and new patients. Generate additional publicity by contacting the Health, or Upcoming Events editors of your local media.

### BEGIN MARKETING YOUR PROMOTION.

Share the details of your upcoming promotion to patients when they are in your office or scheduling appointments, while being sure to not discourage patients from making a purchase prior to the promotion dates. It is very important to start marketing outside to friends, families and neighboring businesses. Online marketing is an effective way of getting word out quickly. Post event details on your practice website, Twitter account, or create a Facebook post to let everyone know to save the date.

### 2 - 3 WEEKS OUT

#### MAIL FLYERS AND/OR POSTCARDS.

Two weeks to ten days in advance of your promotion is the ideal time to start getting the flyers or mailers in the mail. For a good turnout, it is important to mail at least 1,000 pieces. This would also be the time to begin running regular ads in your local newspaper.

#### CALL YOUR TOP PATIENTS.

This is the time to start calling your favorite patients. Be sure to keep a phone log of who was contacted. Set a goal of 10 to 20 calls each day.

#### BOOK EXAMS FOR THE PROMOTIONAL PERIOD.

Plan extra exam reminders in addition to your scheduled recalls to fill your appointment slots and target patients that are likely to purchase through the promotion. See if you are able to identify patient family units, or pediatric patients to invite for exams or to purchase additional eyewear during the promotional period.

### 1 WEEK OUT

#### DISPLAY IN-OFFICE MATERIALS.

Hang a banner or poster announcing the promotion one week in advance. If possible, have the signage visible to outside traffic. Merchandise displays in your office featuring promoted or relevant frame collections. Display posters and flyers throughout the office notifying patients of your promotion.

#### HOST A PRE-PROMOTION STAFF MEETING.

Be sure to hold a pre-promotion meeting with your staff to review promotion details and to set expectations for all roles. Share individual and team sales goals for each day and week, as well as your overall promotional goal.

Outline the methods you will be using to track progress throughout the promotion and how frequently you will check in as a team. Also be sure to share any individual or group incentives you have set for meeting your goals! Practice role-playing patient conversations pricing discussions to make sure everyone is comfortable speaking to the promotion.

### PROMOTIONAL PERIOD

#### MEASURE PROMOTIONAL EFFORTS DAILY AND WEEKLY BY EMPLOYEE.

Post your goal in an office or lunchroom, and assign someone the task of updating it throughout the promotion. It adds excitement to see it all add up throughout the weeks or months. If you are incentivizing friendly competition between employees, determine how each individual's performance is tracked and shared.

Conduct regular team meetings to check-in on how the promotion is going— share challenges, best practices, and successes and revise your strategy as you go!

#### CELEBRATE REACHING SALES MILESTONES.

Don't forget to praise, and possibly reward, your staff for their efforts. Track your progress week over week, and make sure to recognize high sales days, and milestones towards your overall goal.

### POST-PROMOTION

#### DETERMINE PROMOTION PERFORMANCE.

After the promotion has ended, it is time to determine its performance by calculating your total sales and profitability. Divide your increase in sales due to promotional efforts by your total promotional expense to calculate your return on investment (ROI)— but don't forget to consider other measures of success, such as new patients reached and press for your practice.

#### HOST A POST-PROMOTION STAFF MEETING.

Hold a staff meeting to review the promotion: share results, celebrate successes, and discuss lessons learned while your efforts are still front of mind. Take notes of details or strategies you would like to repeat for future promotions, or changes you would make for next time.

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#### Includes Recommendations for:

- Practice Website & Social Media
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- Search Engine Optimization (SEO)
- Enhancing Current Marketing



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