

2023 EMAIL MARKETING STRATEGY



Agenda



HubSpot Updates



SWOT



Business Goal and Marketing Objectives Reminder



Strategy + Customer Journey



Email Strategy and Integration with other Channels



Next Steps

Summary

- ▶ ● Primary focus - email alignment with other channels, systems, dept.
- ▶ ● Learnings about Ortho and LMRC and improvement
- ▶ ● Where we are and where we are going
- ▶ ● 2 Approaches: Functionality and Strategy

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HubSpot Updates

Next Steps - from previous presentation



Sync Dynamics with HubSpot

Choose the integration App

Onboard

- HubSpot - Microsoft Dynamics 365

- Lynton - Dynamics by SyncSmart

Automate

Continue and Advance with Automation

Clean Data

Jenna + Nicole + (Anna) HubSpot Certified App



Achievements



● Sync Dynamics with HubSpot

- Chose the integration App - Kingsway Soft - currently using in integrating Dynamics with Navision - a more powerful tool than HubSpot App - Kingsway Soft connects directly to our Database where we store a copy of Dynamics and pull info from Nav.

● HubSpot Onboarding - complete

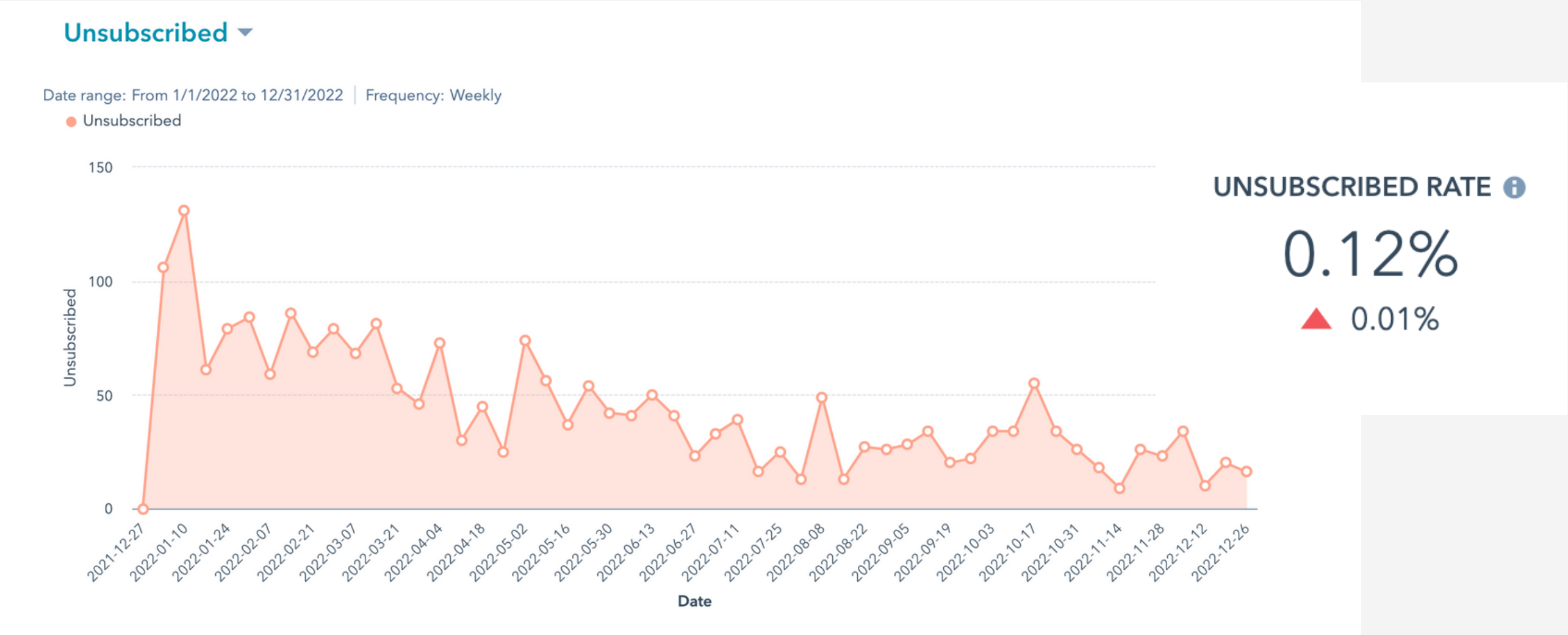
- HubSpot Tech Successfully ended - Tim Luciano
 - Successfully mapped the integration
 - Finishing HubSpot Testing in Sandbox
 - In the process of moving from Sandbox to Production delayed due to Ujwal leaving.
 - Integration goes both ways between Dynamics and HubSpot
 - Successfully identified the source of unsubscribes (Threat): Lynton. This was related to the Opt-Out Syncing from Dynamics. We disabled the Opt-Out sync between Dynamics and HubSpot



Achievements



Unsubscribes due to Lynton mapping



Next Steps 2023



Onboarding

- Ortho Custom Operations Outline and Supporting Automation Process - David Linares

Survey Assistance

- Savannah Mozingo - Customer Success Manager
 - We meet every 8 weeks
 - Will assist with creating surveys without having to pay more for subscription

Campaigns Set Up + Workflows + Sequences

- LMRC | ORTHO

Revenue Attribution

Data Cleaning



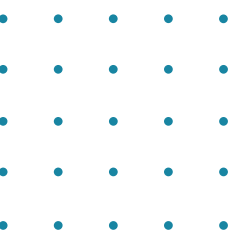
Next Steps 2023



Onboarding



Ortho Custom Operations Outline and Supporting Automation Process



- Sales and Marketing Alignment Automation - David Linares
 - **Schedule:** Started on January 6th - Ends on March 1st - 10hrs
 - **Key Focus Areas:** Automation | LMRC Sales Pipeline + Marketing Alignment | Deals | Workflows | Sequences
 - **Key Focus Team Members:** Yaa Boakye, Anna Cooper, Nicole Gordus



2 Phases:

- **Phase 1:** Marketing & Sales Foundation and Process Mapping.(Where we understand your current sales & marketing processes and how your sales team uses Dynamics)
- **Phase 2:** Workflows Recommendation Build out process

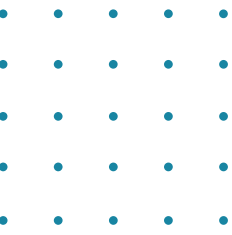
Next Steps 2023



Onboarding



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2 Phases:

- Phase 1: Marketing & Sales Foundation and Process Mapping.(Where we understand your current sales & marketing processes and how your sales team uses Dynamics)
- Phase 2: Workflows Recommendation Build out process



What we were
using HubSpot for

- ▶ ● **Emails (execution + collaboration)**
- ▶ ● **Forms**
- ▶ ● **Social Scheduling**
- ▶ ● **Lists**



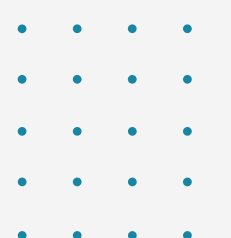
What we use HubSpot for

- ▶ ● **Emails (execution + collaboration)**
- ▶ ● **Forms**
- ▶ ● **Social: Scheduling + Reporting + Campaigns**
- ▶ ● **Calendar: Planner**
- ▶ ● **Campaigns: emails, forms, social**
- ▶ ● **Tasks + Some Collaboration**
- ▶ ● **LMRC Sales Integration (Outlook; Templates)**
- ▶ ● **Reporting**
- ▶ ● **Lists**
- ▶ ● **UTMs: for social + email tracking**



What we will be
using HubSpot for



- 
- A decorative graphic in the top right corner consisting of a 5x5 grid of small teal dots.
- **Emails (execution + collaboration)**
 - **Forms: workflows**
 - **Social: Scheduling + Reporting + Campaigns**
 - **Campaigns**
 - **UTMs: for social + email tracking**
 - **LMRC Sales Integration (Pipeline; Outlook; Templates; Calendar)**
 - **Reporting**
 - **Automation | Workflows | Sequences**
 - **Surveys**
 - **Tasks + team collaboration**
 - **Lists**
 - **Calendar: Planner**



Business Goal



Marketing Objectives Recap

► Business Goal

OMPI: 10 YR - INTERNATIONAL LAUNCH - REPUTATION - LOYALTY - INTEGRATED SYSTEMS

OMPI: 3 YR - GROWTH - CUSTOMER JOURNEY - COMPETITIVE ADVANTAGE - MARKETSHARE - PRODUCT LAUNCH

● Email Marketing Objectives



▶ Business Goal

10 YR - LMRC - ESTABLISHED CONTENT PROVIDER AND THOUGHT LEADER

● Wholistic Marketing Objectives



- ▶ ● **Increase Awareness**
Improve Organic Search
Align Print + Digital
- ▶ ● **Improve Engagement**
Personalize and Automate Messages
Humanize the Brand
Traffic to Events
- ▶ ● **Increase Sales**
Membership - Sign Ups
Event- Sign Ups
- ▶ ● **Increase Advocacy**
Increase Customer Loyalty: Surveys
Retention, Referral, Influencer Partnerships

Awareness

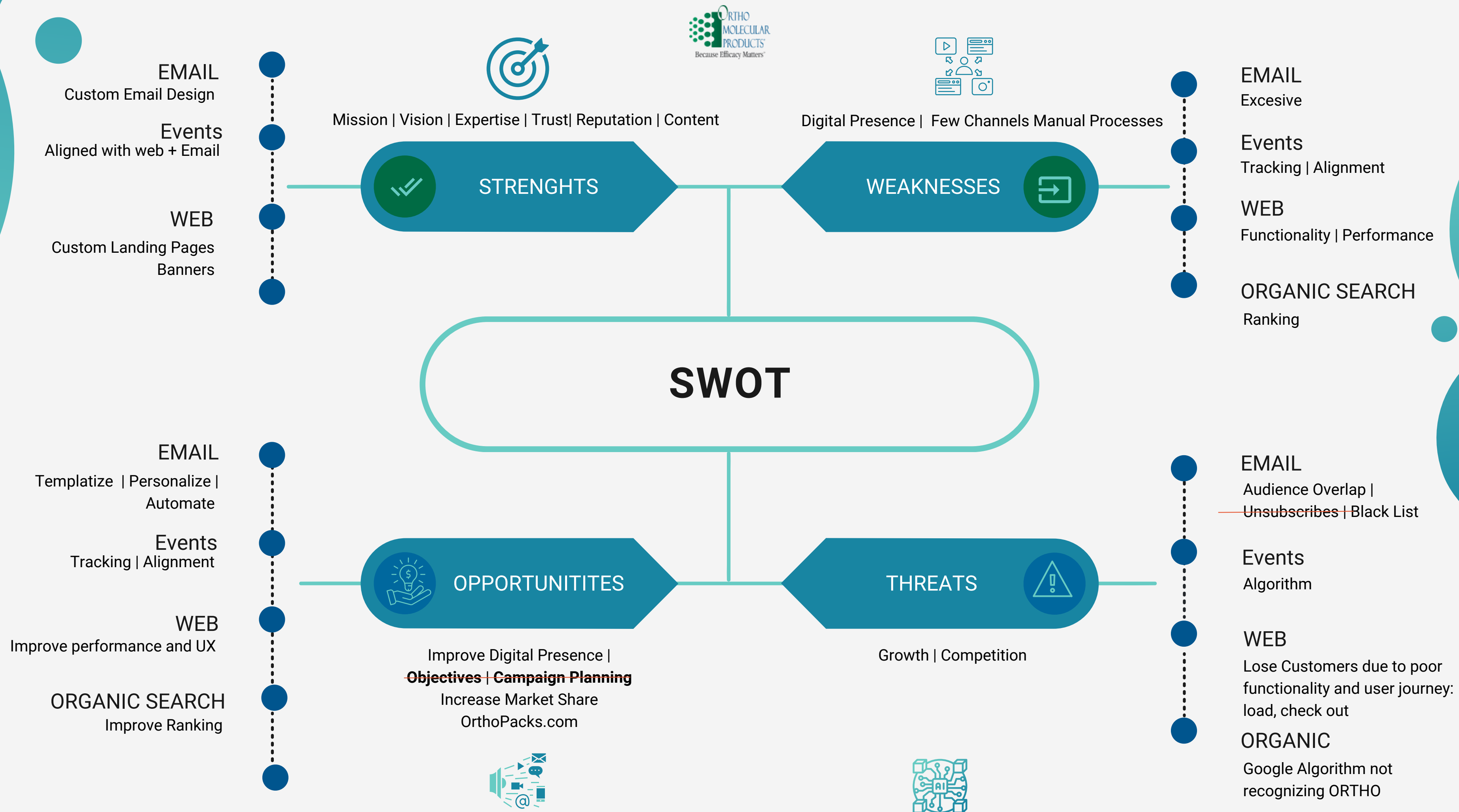
Consideration

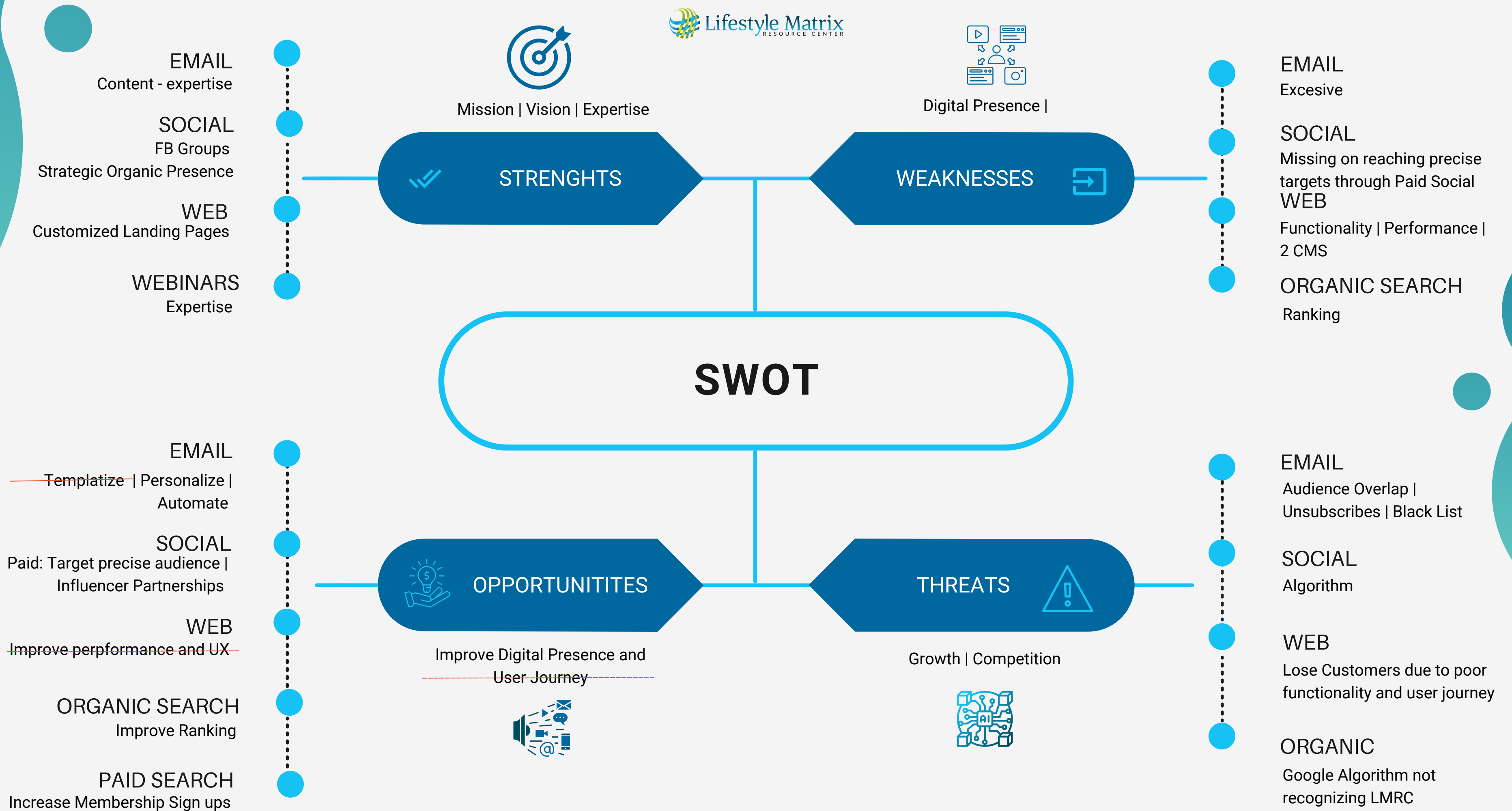
Conversions

Loyalty



SWOT







Strategy

STRATEGY



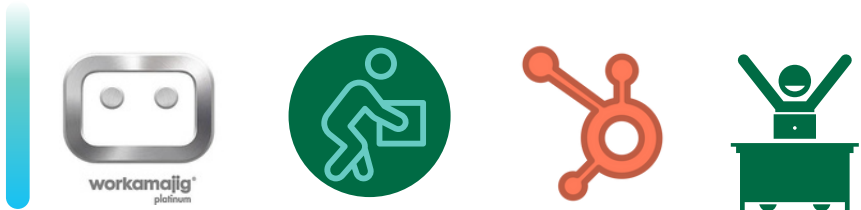
10 YR - INTERNATIONAL LAUNCH -
REPUTATION - LOYALTY - INTEGRATED
SYSTEMS

3 YR - GROWTH - CUSTOMER JOURNEY -
COMPETITIVE ADVANTAGE - MARKETSHARE

Integration Process Marketing

Improve

- Plan
- Set up Campaigns
- Report
- Collaborate



Framework

Aligned Research

- Implement proposed initiatives
- Based on Competitive Analysis | Trends



Personalization

Connect with the audience where they are

- Provide relevant content
- Target Segmentation
- Retarget
- Automate
- Workflow



Integrate all channels

Integrate departments/teams



Build Loyalty Increase Trust

- Explore Influencer Partnership
- **Employee Advocacy**
- Increase Recurring Purchase
- **HR - Candidates Journey - workflow**
- Service + Mkt Aligned



STRATEGY



ESTABLISHED CONTENT PROVIDER
AND THOUGHT LEADER



Difference is in the
channels and approach
(Paid + Organic)

●	Process Marketing Sales Pipeline Improve	• Plan • Set up Campaigns • Report • Collaborate	   
●	Framework Aligned Research	• Adopt and implement initiatives • Based on Competitive Analysis Trends	
●	Personalization Connect with the audience	• Provide relevant content • Target Segmentation • Retarget • Automate • Workflow	
●	Integrate all channels	        	
●	Build Loyalty Increase trust	• Explore Influencer Partnership • Employee Advocacy	
●	Integrate Organic Search with Paid Search	• Increase ranking (SERP) • Reach precise audiences • Increase followers • Increase social engagement • Increase conversions	



Customer Journey



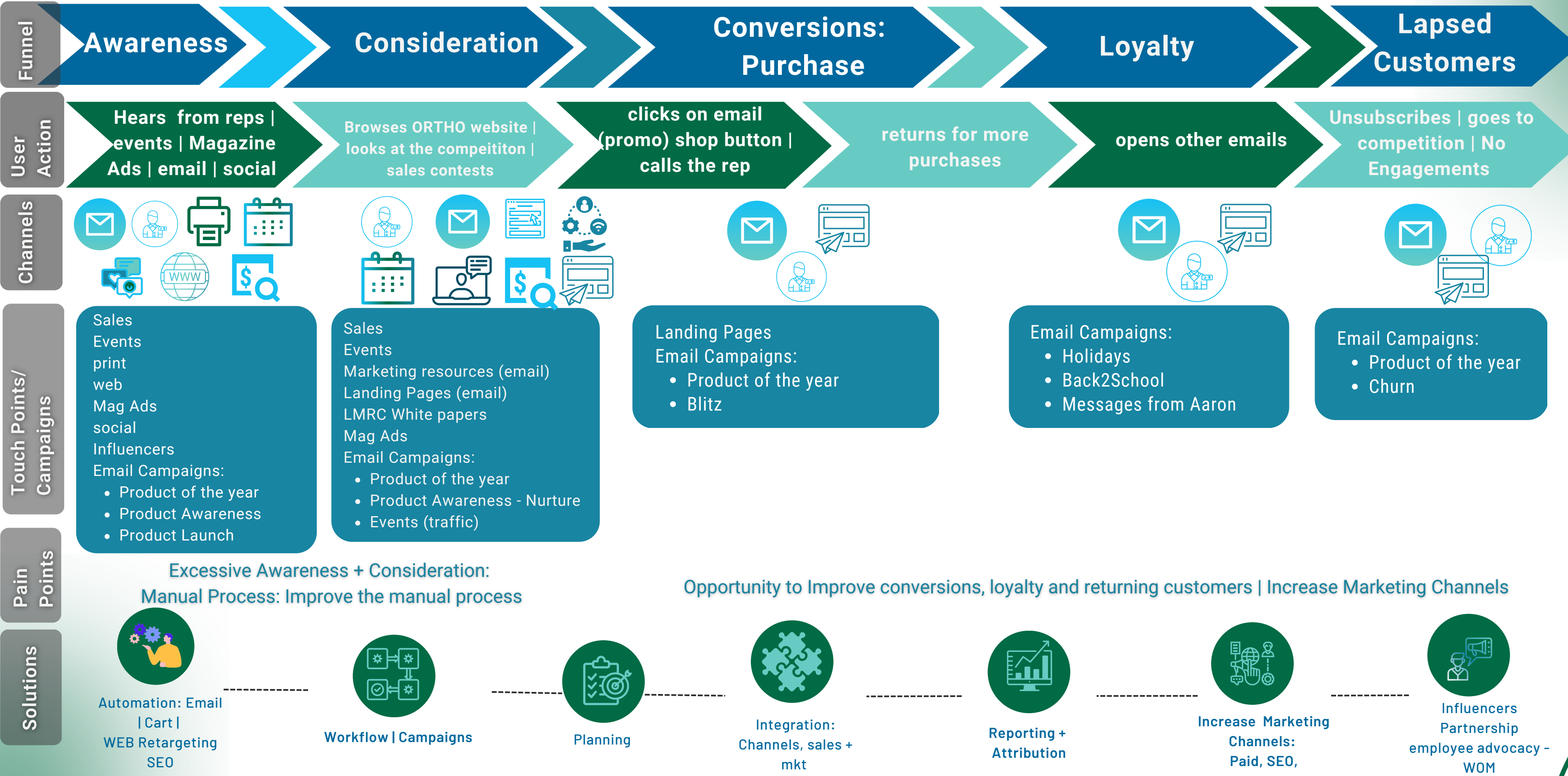
LMRC



OMPI

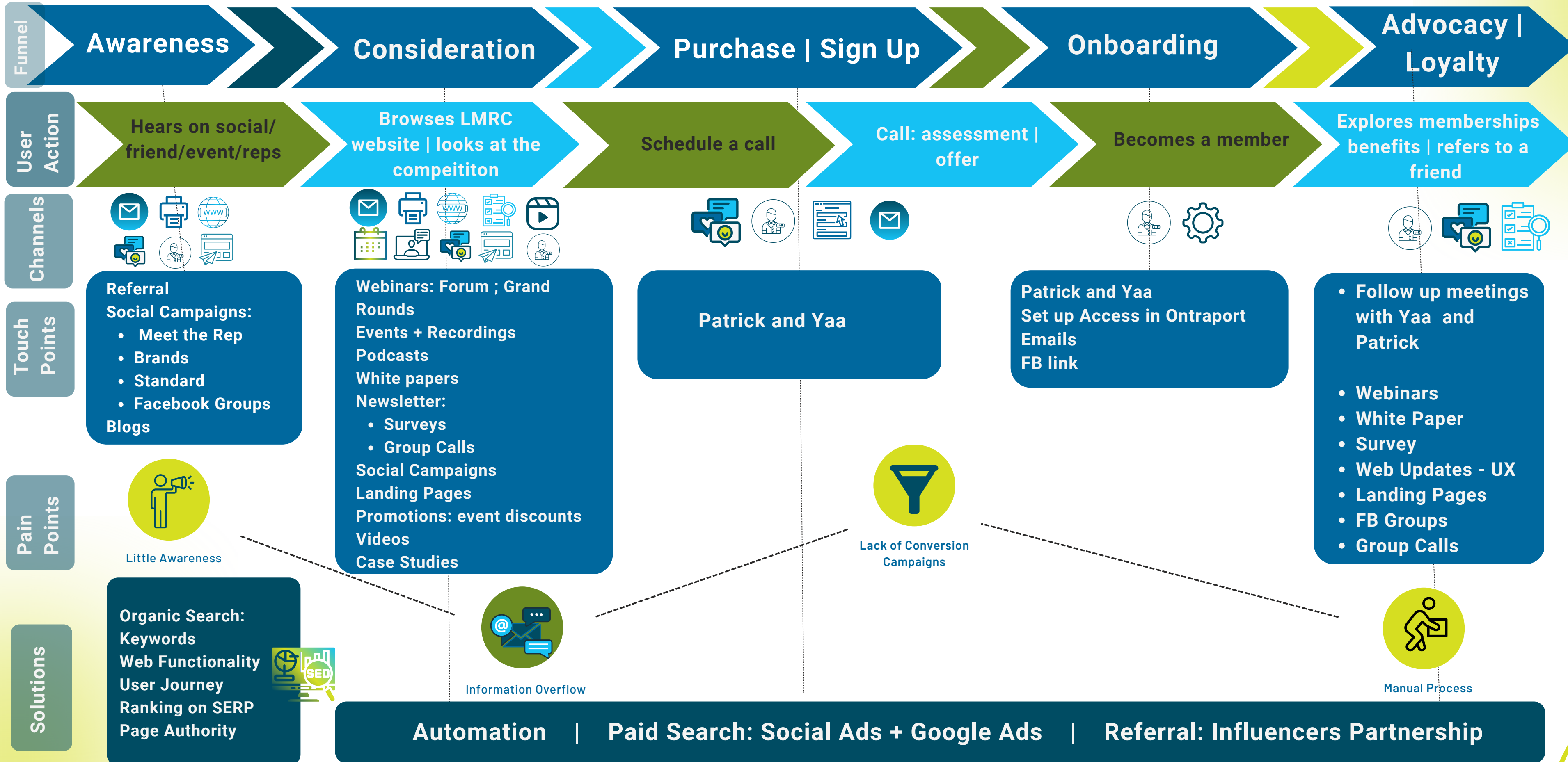
ORTHO CUSTOMER'S JOURNEY + EMAIL ACTIVITY

Marketing Funnel | Channels | User Action | Touch Points | Pain Points | Solutions



LMRC CUSTOMER'S JOURNEY

Marketing Funnel | Channels | User Action | Touch Points | Pain Points | Solutions



Key Terms

Automation

- reach the right people with the right message at the right moment

Workflow

- build personalized, omnichannel campaigns that leverage automation to engage your customers with the right message at the right time.

Attribution - LMRC

- attribute credit to the interactions that created contacts, deals, and revenue in HubSpot, and will apportion higher credit to key conversion points in the lead conversion journey.



OKR

- Email Framework: Brief Calendar
- Channels

Email OKR



Customer Journey
Personalization
Automation
Nurture Leads

KPI

Opens Rate:20%

CTR: 2-4%

Unsubscribes: 0

● **Increase Awareness**
Blogs

Awareness

● **Drive Traffic to the Website/Events**
Newsletters
Increase Engagement
Group Calls

Consideration

● **Increase Conversions**
Purchases
Events Sign Ups

Conversions

● **Increase Advocacy**
Newsletters: surveys

Loyalty

Email OKR



Customer Journey
Personalization
Automation
Nurture Leads

KPI
Opens Rate:20%
CTR: 2-4%
Unsubscribes: 0

● **Increase Awareness**
Product Launch
Product Awareness

● **Engagement | Traffic**
Product Awareness Nurture
Increase Engagement
Churn

● **Increase Conversions**
Promotions
Blitz

● **Increase Advocacy**
Personalized Messages from Aaron

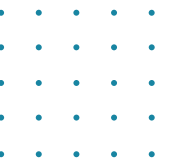
Awareness

Consideration

Conversions

Loyalty

EMAIL FRAMEWORK LMRC + ORTHO



TEMPLATIZE FOR LMRC

- Newsletter
- Blog
- The Standard



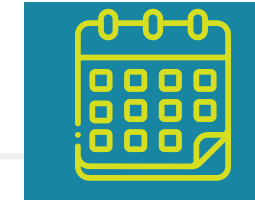
EMAIL LENGTH

- **Subject line:** less than 9 words: 50 characters
- **Content** length: 50 to 125 words
- Average email **attention** grabbing is 5-7 sec
- **Spam Check Tool**



CTA 1-2

- **Awareness:**
 - Learn More | How
- **Considerations**
 - Watch | Share
 - Ask Questions, Polls
- **Conversion**
 - Buy now | Shop Now
 - Sign Up
 - Get Access
 - Join Now
- **Loyalty**
 - Feedback



PLANNING

- **Brief** for every campaign with objectives
- **Campaigns in HubSpot**
- **Workflows**
- **Schedule** ahead
- **Avoid** email blacklist and audience overlap:
 - **Automation**
 - **Journey**
 - **Personalization**
 - **Retarget**

In progress



OPTIMIZE CAMPAIGNS WITH A/B TESTING

- **Subject Line**
- **Previews**
- **Copy**
- **CTA**
- **Tone**
- **Emojis (LMRC only)**

Not Started

Brief ▶ ●

1 Scannable Page

Campaign Kickoff meeting with
Comm + Digital Mkt.

- Campaign Name
- Summary | Notes
- Goal
- Objectives
 - KPI
 - CTA
- Target Audience
- Event Date
- Marketing Channels
- Notes about each channel
- Email Frequency + Dates
- Associated WMJ Projects

[Product Of the Year]

MitoCORE
Immune

Program of the year –
Cardiovascular Health



Tier 1

Sales Marketing Driven

Connected to the program we are updating

Yearlong Campaigns

Product Awareness

Trade Ads

Trade Shows

LMRC blogs, webinar, Q webinar + Grand Rouds 3

Pharmace

Tier 2

TrdeShows

Emerson / Fullscript webinar - chronic fatigue

Mltochondrial Summit

PLMI Bioenergeticcs

A4M Spring Florida - mito core promo

Other Products: BioPC| CoQ10 | L- Glutathione | High dose Melatonin | TRuAdapt | CereVive | Core Restore | CM Vitals

LMRC blogs, webinar, Q webinar + Grand Rouds 3

Pharmace

[Product Launch]

2023 Calendar

12 mo. Campaign: 4 Phases (3 mo. each)

Briefs for each Phase

5-6 products/year - only 2-3 get a strategic promotion

PRODUCT LAUNCH

2023 Schedule

	JAN/FEB	MARCH/APRIL	MAY/JUNE	JULY/AUGUST	SEPT/OCT	NOV/DEC
US	<u>UA-X PRO</u> <u>HepatoCORE</u> 0753 -3/3 Glycocalyx 0703 - 2/21	<u>Orthomega V</u> 0876? July?? <u>Vessel Max</u> 0818 4/3	<u>HiPhenolic</u> <u>Cere Vive Jr.</u> 0134 5/25	xx	xx	xx
CA	<u>Indigo Greens</u> <u>Reacted Iron Feb</u> <u>6th</u>		xx	xxx	xx	xx
CA	Saccharomyces Boulardii 3/7					

[Product Launch US]

1st initial awareness email prior to phases start
4 Phases
12 mo. campaign
3 mo. each

- Propose:
 - Reduce email to 3 (apply marketing funnel)
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Email Content
 - Personalization (salutation) - once data is clean

Email 1- Launch

New Product Launch Promotion and Sales Contest

Goal: Maximize penetration

Target Audience: All active customers

Note: Product main focus | 3/4 bullet points - Clinical Applications
Louie working closely with Mark G. and John H. during the release.

Channels: Sell Sheet| Email | Web (landing page + banner)

Banner + Web + email: Go live on the day of the launch

Emails: 1

Objectives:

Email 1: Increase Awareness: benefits, product information + Conversions

CTA: learn more

KPI: Open Rate: 20%

KPI: CTR 2-4%

[Product Launch US]

1st initial awareness email prior to phases start
4 Phases
12 mo. campaign
3 mo. each

- Propose:
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 - Personalization (salutation) - once data is clean

Phase I -Brief

New Product Launch Promotion and Sales Contest

Goal: Maximize penetration

Target Audience: All active customers

Promo: 12+2

Timeline: 3 months

Channels: DM | Email | Web (landing page + banner) | Trade Show | Box Stuffer

Banner: Goes live the first day of the promotion

Emails:

Frequency: 3 - 6

Objectives:

Email 1: Increase Awareness: benefits, product information

CTA: learn more

KPI: Open Rate: 20%

Email 2: Increase Consideration: social media and other marketing resources

CTA: Share | Take Advantage

KPI: CTR: 2%-4%

Email 3: Increase Conversions

CTA: buy now | shop now

KPI: sales conversions

[Product Launch CA]

1 email - adopt the same tactics as US

- Propose:
 - Reduce email to 3 (apply marketing funnel)
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Email Content
 - Personalization (salutation) - once data is clean
 - Marketing resources

Phase I -Brief

New Product Launch

Goal: get as much penetration as possible

Target Audience: All active customers (*Accounts, Leads, Pharamce*) -

Promo: 12+2

Timeline: 3 months

Channels: DM | Email | Web (Landing Page + Banner)

Banner: Goes live the first day of the promotion

Emails:

Frequency: 1

Objectives:

Email 1: Increase Awareness: email sent using a/b testing + Sales Conversions

CTA: learn more

KPI: Open Rate: 20%

KPI: CTR: 2-4%

*Note: Pending on marketing materials increase the email frequency

[Product Launch US]

Phase II - Brief

Launch Promotion targeting top Accounts who didn't respond in Phase I

No Digital Marketing

Target Audience: top 500-800 customers existing customers who haven't ordered in Phase I

Channels: DM

Promo: 

4 Phases

12 mo. campaign

3 mo. each

- Propose: Automation and personalization
 - email retargeting based on web navigation (cart abandonment, other product interests, etc.)

[Product Launch US]

4 Phases
12 mo. campaign
3 mo. each

- Propose:
 - Reduce email to 3 (apply marketing funnel)
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Email Content
 - Personalization (salutation) - once data is clean

Phase III - Brief

Launch Promotion targeting customers who haven't reordered after phase I

Goal: Retarget customers who purchased during Phase 1 and haven't repurchased again - help them identify the right patients and use the product for best results - Increase Sales - **Consideration - Reengagement**

Target Audience: Run a sales report for those customers who ordered (12 or more) the featured product during the 3 months of phase 1 but haven't ordered in the following 3 months.

Promo:  No

Timeline: 3 months

Channels: Email

Emails Frequency: 3 - 6

Objectives:

- **Email 1:** Increase Awareness: DM: Trifold, Newsletter etc.
 - CTA: learn more | Read | Find Out
 - KPI: Open Rate 20%
- **Email 2:** Increase Consideration: marketing resources (social)
 - CTA: Share
 - KPI: CTR: 2%-4%
- **Email 3:** Increase Consideration: video
 - CTA: Share |
 - KPI: CTR: 2%-4%
- **Email 3:** Increase Conversions
 - CTA: buy now | shop now
 - KPI: sales conversions
- **Email 4:** Repeat Email 1: Increase Awareness: DM: Trifold, Newsletter etc.
 - CTA: learn more | Read | Find Out
 - KPI: Open Rate 20%
- **Email 5:** sent from LMRC and will promote a clinical resource (presentation pad, patient assessment, white paper)
 - CTA: learn more | Read | Find Out
 - KPI: Open Rate 20%
- **Email 6:** sent from LMRC will promote a webinar on the topic related to the featured product - last email to be sent two weeks prior to the end of the campaign

*Note: Email 6 pending on existing events

[Product Launch US]

4 Phases

12 mo. campaign

3 mo. each

Phase IV - Brief

Sales team targets high value opportunities in their territory

Goal: Sales team targets high profiles

Target Audience: Each sales team identifies top 3 largest opportunities from each territory - top leads

Promo:  12+3

Timeline: 3 months

Channels: Sales | DM | Promo | WOW BOX

[Product Awareness]

Primary Campaign

6/year: 2 mo. promotions

- Propose:
 - Reduce email to 3
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Email Content (if we have more content)
 - Personalization (salutation) - once data is clean

BRIEF

Situation: Spread the focus across programs | Create PA and PA Nurture at the same time

Target:

Channels: DM | Email | WEB: Banner + Landing Page | Sales Contest | Top 100 Sample Box

Content: Provided by Brand Managers for DM, Sales Training)

PROMO CODE: 

WOW BOX: sent out within 2 weeks of the start - top 100 customers that have never ordered the product)

Landing Provided by Brand Managers for DM, Sales Training)

Email Frequency: 5 US | 3 CA

Objectives:

Email 1: Awareness: Benefits of the product (DM)

CTA: Learn More

KPI: Open Rate 20%

Email 2: Awareness: Benefits 2

CTA: Learn More

KPI: Open Rate

Email 3: Consideration – trifold, PDN, newsletter, video, social

CTA: Read, Find

KPI: Open Rate

Email 4: Conversion – Focus on promotion

CTA: Buy

Email 5: Conversion – Focus on promotion

CTA: Buy

PRODUCT AWARENESS

2023 Schedule
Promo

	JAN/FEB	MARCH/APRIL	MAY/JUNE	JULY/AUGUST	SEPT/OCT	NOV/DEC
US	BioPC Pro/MitoCORE (CSR Upsell: L- Glutathione)	<u>Myco Active</u> 0785 (CSR Upsell: Melatonin)	Collagen (CSR Upsell: Cosmedix)	InflammaCORE (CSR Upsell: DG Protect)	Vitamin K Family (CSR Upsell: Lipitrol OX)	Fiber Plus (CSR Upsell: Super Aloe)
CA	MitoCORE 0781	<u>Wholemune</u> <u>0787</u>	Collagen	InflammaCORE	Vitamin K Family	Fiber Plus

[Product Awareness - Nurture Campaign]

6/year: every 2 months

BRIEF

Situation: awareness follow up | Only US

Goal: Reinforce purchase decision, facilitate sell-through and drive reorders

Target: Lists: Anyone who purchased 6 or more bottles during the product awareness - use the same list for all emails

Channels: Email | Landing Page

Content: similar to product awareness - DM

PROMO CODE:  on the last email (4th)

Email Frequency: 4 - every week

Objectives:

Email 1: Awareness: Benefits of the product (DM) 1 week later

CTA: Learn More

KPI: Open Rate 20%

Email 2: Awareness: Benefits 2 - 1 week later

CTA: Learn More

KPI: Open Rate

Email 3: Consideration – trifold, PDN, newsletter, video, social - 2 weeks later

CTA: Read, Find

KPI: Open Rate

Email 4: Conversion – Focus on promotion - 2 weeks later

CTA: Buy - promo

PRODUCT AWARENESS NURTURE

2023 Schedule
Promo

	JAN/FEB	MARCH/APRIL	MAY/JUNE	JULY/AUGUST	SEPT/OCT	NOV/DEC
US	Thyrotain - 0853	BioPC Pro/MitoCORE - 0855	MycoActive	CollaGEN	InflammaCORE	Vitamin K Family

[Blitz]

4 seasonal campaigns:

- **Viracid spring + fall (Allergies),**
- **Core Restore (January)**
- **Back2School (Fall),**
- **Product of the Year**

- Propose:
 - Reduce email to 3-4
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Email Content (if we have more content)
 - Personalization (salutation) - once data is clean

BRIEF

Marketing Driven initiative - no announcement to the sales team

Goal: Increase sales?

Target Audience: Active Customers that have purchased more than 250 (mailing + emailing list)

Channels: DM | Email | WEB: Banner + Landing Page

PROMO CODE:  2 promo codes

1. Buy 12 Get 2

2. Buy 18 and get 1 free blister box

Email Frequency: 4 Seasonal Campaigns: Viracid spring + fall (Allergies), Core Restore (January), Back2School (Fall), Product of the Year

Objectives:

Email 1: Awareness: Benefits of the product (DM)

- CTA: Learn More
- KPI: Open Rate 20%

Email 2: Awareness: Benefits 2

- CTA: Learn More
- KPI: Open Rate

Email 3: Consideration – trifold, PDN, newsletter, video, social

- CTA: Read, Find
- KPI: Open Rate

Email 4: Conversion – Focus on promotion

- CTA: Buy

Email 5: Conversion – Focus on promotion

- CTA: Buy

[Blitz]

Back2School

BRIEF

Marketing Driven initiative - no announcement to the sales team

Goal: increase seasonal sales: Springboard: Orthomega | SuperNutes | FloraBites | Kid-D | Imu-Max | ViraKid

Target Audience: General | Pharmacists

Channels: DM | Email | WEB: Banner + Landing Page

PROMO CODE: 

Email Frequency: 4

Objectives:

- Propose:
 - Reduce email to 3
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Email Content (if we have more content)
 - Personalization (salutation) - once data is clean

Email 1: Awareness: Benefits of the product (DM) (General)

- CTA: Learn More
- KPI: Open Rate 20%

Email 2: Awareness: Benefits 2 (Pharmacist)

- CTA: Learn More
- KPI: Open Rate

Email 3: Consideration – trifold, PDN, newsletter, video, social (General)

- CTA: Shop | Buy
- KPI: Sales Conversions

Email 4: Conversion – Focus on promotion (Pharmacist)

- CTA: Shop | Buy
- KPI: Sales Conversions

[Blitz]

January - Core Restore

BRIEF

Marketing Driven initiative - no announcement to the sales team

Goal: increase seasonal sales: Springboard: Orthomega | SuperNutes | FloraBites | Kid-D | Imu-Max | ViraKid

Target Audience: General | Pharmacists

Channels: DM | Email | WEB: Banner + Landing Page

PROMO CODE: 

Email Frequency: 4

Objectives:

- Propose:
 - Reduce email to 3
 - Apply A/B testing:
 - Subject Line
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Email 1: Awareness: Benefits of the product (DM) (General)

- CTA: Learn More
- KPI: Open Rate 20%

Email 2: Awareness: Benefits 2 (Pharmacist)

- CTA: Learn More
- KPI: Open Rate

Email 3: Consideration – trifold, PDN, newsletter, video, social (General)

- CTA: Shop | Buy
- KPI: Sales Conversions

Email 4: Conversion – Focus on promotion (Pharmacist)

- CTA: Shop | Buy
- KPI: Sales Conversions

[Blitz]

Spring - D-Hist

Allergy Season: South + North

BRIEF

Marketing Driven initiative - no announcement to the sales team

Goal: increase seasonal sales: Springboard: Orthomega | SuperNutes | FloraBites | Kid-D | Imu-Max | ViraKid

Target Audience: General | Pharmacists

Channels: DM | Email | WEB: Banner + Landing Page

PROMO CODE: ✓

Email Frequency: 4

Objectives:

- Propose:
 - Reduce email to 3
 - Apply A/B testing:
 - Subject Line
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 - Personalization (salutation) - once data is clean

Email 1: Awareness: Benefits of the product (DM) (General)

- CTA: Learn More
- KPI: Open Rate 20%

Email 2: Awareness: Benefits 2 (Pharmacist)

- CTA: Learn More
- KPI: Open Rate

Email 3: Consideration – trifold, PDN, newsletter, video, social (General)

- CTA: Shop | Buy
- KPI: Sales Conversions

Email 4: Conversion – Focus on promotion (Pharmacist)

- CTA: Shop | Buy
- KPI: Sales Conversions

BLITZ

2023 Schedule
Promo

	JAN/FEB	MARCH/APRIL	MAY/JUNE	JULY/AUGUST	SEPT/OCT	NOV/DEC
US	<u>Core Restore</u>	<u>SOUTH D-Hist</u> <u>Spring 0772</u>	<u>NORTH D-Hist</u> <u>Spring 0773</u>	<i>Back2School</i> <i>Springboard</i>	Viracid	
CA	X	X	X	X	X	X

[Churn]

3 Products:

D-Hist | Orthomega | Ortho Biotic

9 emails/Q

Campaign repeats every quarter

36 email/year

- Propose:
 - 1st Automation

BRIEF/Q

Situation: Targeting lapsed audience - customers who haven't purchased anymore

Note: 2023 Automation |

Channels: Email | WEB: Banner + Landing Page

Goal: Increase dropped sales - incentivize customers whose purchases of Orthomega, D-Hist, or Ortho Biotic have dropped 50% or more to purchase more.

PROMO CODE:  12+3 | 12+ 3 | 6+1

Target Audience: 3 different lists for each email. Lists from Ryan Bratel

Email Frequency: 9, beginning of each month.

Objectives:

Email 1: Awareness: Benefits of the product + Conversions (for each product, total of 3 emails) - reminder to reorder

CTA: start my order

KPI: CTR + sales

Email 2: Consideration: Marketing Resources: [Social Media + Patient Handout] + Conversions (Provide support through marketing materials)

CTA: Share + Download + start my order

KPI: CTR + sales

Email 3: Conversion (Last chance to get your free bottle)

CTA: start my order

KPI: CTR and sales

CHURN

2023 Schedule
Promo

	Q1 JAN - MARCH	Q2 APRIL - JUNE	Q3 JULY -SEPT	Q4 OCT - DEC
US	D-Hist Orthomega Ortho Biotic	D-Hist Orthomega Ortho Biotic	D-Hist Orthomega Ortho Biotic	D-Hist Orthomega Ortho Biotic
CA	x	x	x	x

[Event] PLMI

April 21-22

- Propose:
 - Reduce emails from 8 to 4 or 5 (1, 2 informative + drive traffic to the event) 3 preorder recording; 4th purchase recording - align with Angela's input
 - Integrate with Social during the event to increase Engagement

KPI

Opens Rate: 20%

CTR: 2-4%

Unsubscribes: 0

BRIEF

Note: Comparing results from 2022

2021: 2 events; March: 6; May 12 emails

2022: 1 event; February: 1 event 8 emails

2023: 1 event; April: 4/21-4/22

Goal: Brand Exposure to the event

Target Audience: Event US Accounts + Leads

Channels: | Email | Landing Page

PROMO CODE: Save \$100 when you sue promo code (from the flyer)

Email Frequency: 2021

Objectives:

Email 1 Pre Event:

Awareness | Consideration

- CTA: learn more | register
- KPI: CTR 2-4 +
Open Rate 20%

Email 2 Post Event:

Awareness | Consideration

- CTA: learn more | register
- KPI: CTR 2-4 +
Open Rate 20%

Email 3 Pre Event: Consideration

- CTA: **Preorder Recording?**
- KPI: form downloads

Email 4 Post Event: Consideration

- CTA: Purchase Recording
- KPI: CTR 2-4%
- Open Rate: 20%

[Event] IFM/APM

Jan 20-22: Functional Medicine Advanced Practice Modules®(APM) Cardiometabolic 2023

- Propose:
 - Integrate with Social during the event to increase Engagement

BRIEF

Note: Consider using polls for post events to keep the audience engaged and receive feedback
Consider Lead Nurturing
Use Experts like Carrie Jones and Vojdani to back up the products

Goal: Increase Event Attendance and Traffic to Recordings

Target Audience: Event attendees | We get emailed the list from Mandi at IFM – Lisa G provides it.

Channels: | Email | Landing Page

PROMO CODE:

Email Frequency: 2

Objectives:

Email 1 Pre-Event: Consideration - traffic to event

- KPI: CTR
- CTA: register

Email 2 Post Event: Conversion

- CTA: view recording
- KPI: CTR 2-4%

[Event] A4M

Work in Progress

Tradeshow Virtual Booth

- Propose:
 - Integrate with Social during the event to increase Engagement

BRIEF

Note: Consider using polls for post events to keep the audience engaged and receive feedback
Consider Lead Nurturing
Use Experts like Carrie Jones and Vojdani to back up the products

Goal: Increase Event Attendance and Traffic to Recordings

Target Audience: Event attendees

Channels: | Email | Landing Page

PROMO CODE:

Email Frequency: 2

Objectives:

Email 1 Pre Event: Conversion

- CTA: register
- KPI: form downloads

Email 2 Post Event: Conversion

- CTA: view recording
- KPI: CTR 2-4%

[Event] IHS

Work in Progress

Tradeshow
Virtual Booth

- Propose:
 - Integrate with Social during the event to increase Engagement

BRIEF

Note: Consider using polls for post events to keep the audience engaged and receive feedback
Consider Lead Nurturing
Use Experts like Carrie Jones and Vojdani to back up the products

Goal: Increase Event Attendance and Traffic to Symposia dinner

Target Audience: All US Accounts + Leads Event attendees

Post Show Email: Target Audience is the list provided by Lisa G, and it contains all the people that attended the symposium

Channels: |Trade Show | DM | Email

PROMO CODE: yes - dinner attendees

Email Frequency: 2

Objectives:

Email 1 Pre Event: Conversion

- CTA: register
- KPI: form downloads

Email 2 Post Event: Conversion

- CTA: view recording
- KPI: CTR 2-4%

**[EVENT] IFM (10)/APM
A4M (4) - ANTI AGING
PLMI - IHS**

2023 Schedule - work in progress

[illegible]

[Webinar]: Pharmace:

Q1 - 5 emails

Q2 - 5 emails

Q3 - 5 emails

Q4 - 5 emails

- Propose:
 - Integrate with Social during the event to increase Engagement

Event registration announcements + speaker info Mitocore

Note: Drive traffic to the event | Sometimes there is a speaker | Quarterly | Associated with PA

Post: Thank you message + send traffic to recording

Copy: Harry Provides Copy

Pain Point: Loosing market share to big pharma;

Opportunity to change - and increase sales

Goal: Increase market share and encourage pharmacists to adopt a change

Target Audience: Pharmace Accounts + Leads + Ca

Channels: Email | Webinar | Form | Go To Webinar

PROMO CODE: No

Email Frequency: 4 pre - 1 post

Objectives:

Email 1 Pre Event: Conversion - Increase event registrations

- CTA: register
- KPI: form downloads

Email 2 Post Event: Consideration - Engagement - Increase traffic to recording

- CTA: view recording
- KPI: CTR 2-4%

PHARMACE WEBINARS

Qaurterly

	Q1 WD MARCH 15	Q2 WD JUNE 21	Q3 WD SEPTEMBER 13	Q4 WD NOVEMBER 15
US + CA	Mitocore Mitochondrial Health: Options to Enhance Cellular Energy Production and Support Immune Function <u>0160</u> <u>6:00 - 6:30</u>	COLlagen The Ultimate Guide to Recommending Collagen Supplements 0161 @6:00-6:30	Vitamin K Vitamin K: The Real Story and Benefits of This Vital Nutrient 0162 @6:00-6:30	Fiber Plus Natural Solutions for Constipation 0163 @6:00-6:30

[Symposium]: Pharmace:

October

- Propose:
 - Integrate with Social during the event to increase Engagement

XX

Note: xx

Post: xx

Copy: xx

Pain Point: Loosing market share to big pharma;

Opportunity to change - and increase sales

Goal: Drive traffic to events

Target Audience: Pharmace Accounts + Leads

Channels: Email | Webinar | Form | Go To Webinar

PROMO CODE: ?

Email Frequency:

Objectives:

Email 1 Pre Event: Conversion

- CTA: register
- KPI: form downloads

Email 2 Post Event: Consideration - Engagement -Traffic

- CTA: view recording
- KPI: CTR 2-4%

[Holiday] Promotion

BRIEF

Holiday Announcement: Christmas | Thanksgiving | CA + US

Goal: Inform customers about office being closed during a holiday and encourage them to purchase before the holidays

Target Audience: All

Channels: Email | DM (has an offer)

PROMO CODE:  NOT ASSOCIATED WIT HTHIS EMAIL - varies, depends on the eligibility of each customers and how much they purchase (if an order is doubled than the customer average they get a discount) 10% - 20%

Email Frequency: 2: 1 CA | 1 US

Objectives:

Email 1 CA: Awareness + Conversion

- CTA: buy
- KPI: sales

Email 2 US: Awareness + Conversion

- CTA: buy
- KPI: sales

- Propose:
 - Apply A/B testing:
 - Subject Line
 - Emoji/No emoji
 - Tone/Personality
 - CTA (color, design, etc)
 - Personalization (salutation) - once data is clean

[Notification] US CA Contest Winners

- Propose:
 - Scheduled in WMJ - quarterly
 - [Email Sample](#)

BRIEF

Quarterly contest winners email announcement CA + US

Note: gift card by mail | Announcement sent for the previous quarter

Goal: increase customers 'engagement and loyalty

Target Audience: US | CA

Channels: Email

PROMO CODE: \$250 Ortho Molecular Products gift card by mail

Email Frequency: 2: 1 CA | 1 US

Objectives:

Email 1 CA + US: Awareness

- CTA: congratulate.
- KPI: open rate

CONTEST WINNERS

2023 Schedule

\$250 Ortho Molecular Products gift card

	Q1 JAN	Q2 APRIL	Q3 JULY	Q4 OCT
US	<u>0886</u>	0091	0093	0094
CA	<u>0887</u>	0092	0095	0096

[Trade Ads] Chiropractic Economics

- Propose:
 - Enroll New Customers in an automated workflow

BRIEF

Quarterly / 4 - 5 times a year

Note: Jeff provides information. We create a form to promote the product of the year:
Product of the Year- MitoCORE

Goal: Increase Brand exposure and Lead Generation

Target Audience: 10K Chiropractic Economics subscribers

Channels: Print/ Digital Ad - Email

PROMO CODE: Free Product

Email Frequency: 4

Objectives:

Increase form submissions on MitoCORE

- CTA: Get your free product/ Claim your free product
- KPI: News Customers/Form Submissions

TRADE ADS

Chiropractic Economics | Emerson
2023 Schedule
Form Submissions

	JAN/FEB	MARCH/APRIL	MAY/JUNE	JULY/AUGUST	SEPT/OCT	NOV/DEC
US	XX	<u>Spring 2023 HPC Trade Ad</u> 0106				
	<u>Chiro 0883</u> <u>feb 22nd - \$1,850</u>	Chiro - Ad Material Deadlines 4/20 Start Date: 5/1 <u>#0879</u> \$1,850		Chiro - Ad Material Deadlines 7/20 Start Date: 8/1 - \$1,850	Chiro - Ad Material Deadlines 10/21 Start Date: 11/1 \$1,850	
	Emerson (April) Due Date 2/15 Allergy/Immune Support Natural D-Hist/D- Hist Jr \$3,100		Emerson (August) Due Date 6/15 Allergy/Immune Children's Health Chondro-FLX \$3,100		Emerson (November) Due Date 9/15 Allergy/Immune Sleep Support GABAnol \$3,100	

[Roundtable Event]

Toronto | Vancouver

- Propose:
 - Enroll New Customers in an automated workflow

BRIEF

6 emails

Goal:

Target Audience:

Channels:

PROMO CODE:

Email Frequency: 6

Objectives:

Increase form submissions on MitoCORE

- CTA: Get your free product/ Claim your free product.
- KPI: News Customers/Form Submissions

[Notifications]

Holidays

Distribution Issue

Personalized messages from
Aaron - loyalty

RTC

[LMRC Newsletters Campaigns]

KPI

Opens Rate:20%

CTR: 2-4%

Unsubscribes: 0

Form Conversions

BRIEF

Situation:

The purpose of this campaign is to align the strategy, objectives, and workflow for the January Newsletter. We will clone the Newsletter template in HubSpot. The goal of the newsletter is to provide members consistent reminders about Membership benefits, resources, group calls, events and more. We will start every newsletter with a survey.

Template in HubSpot.

Campaigns in HubSpot

Goal: **Increase LMRC Growth**
 Increase Members Retention

Target Audience: Members

Channels: email | business coaching calls | surveys | forms | landing pages | events(grand rounds) | social

Email Frequency: weekly

Objectives:

Increase Awareness about the membership benefits:

CTA: Learn more about (resources, tools) | Discover your solution | Find out more | View membership types

Increase Traffic to the website: resources.

CTA: Visit | Take advantage

Increase Engagement

CTA: (If that sounds familiar) Let's talk

Increase Conversions:

CTA: Book a Meeting| Schedule a Concierge Call | Sign Up | Subscribe | Get Started | Join Us (Join Medical Experts like you) | Download now (whitepaper)

Increase Loyalty (surveys + promotions):

CTA: We appreciate your feedback | Let us know more

Themes: Surveys | Event Announcements | Business Coaching Calls | Other | Website Announcements

[LMRC Blogs]

Frequency: weekly

Objective: Increase Awareness

Target Audience: All (Ortho | US |
CA Accounts & Leads)

Notes:

[LMRC Sprint]

Frequency: Quarterly

Objective: Drive traffic to ...

Target Audience: Evo Med

Notes:

BUSINESS COACHING CALLS

2023 Schedule

	FEBRUARY 10TH MASTER CLINICAL COMMUNICATION: UTILIZING PRESENTATION PADS TO IMPROVE PATIENT OUTCOMES	FEBRUARY 24TH EMPOWER YOUR PATIENTS USING MEANINGFUL AND ACTIONABLE PATIENT EDUCATION HANDBOOKS	MARCH 10TH LAUNCH PARTY: AN INTRODUCTION TO THE NEW CM-VITALS CONTENT	MARCH 17TH UNLOCK THE POWER OF PATIENT JOURNEY MAPPING TO STREAMLINE PRACTICE PROCESSES AND IMPROVE PATIENT RETENTION
Goal	The goal of this Group Business Coaching Call is to help functional medicine providers learn how to effectively use LMRC presentation pads to quickly communicate complex health issues in a manner that a patient can understand and take action on.	The goal of the Group Business Coaching Call is to help functional medicine providers learn how to effectively implement the LMRC patient handbooks into their patients care plans, so they have a better understanding of their health conditions while providing them with information and actionable steps regarding nutrition, supplementation and lifestyle changes.	The goal of this Group Business Coaching Call is to help functional medicine providers increase their understanding and appreciation of the existing and new cardiometabolic content, learn how best to leverage patient education materials, and maximize the impact of their presentations as a way to become thought leaders and attract ideal clients	The goal of this Group Business Coaching Call is give providers the tools and resources needed to develop effective patient onboarding and on-going education strategies that optimize patient care, compliance, and retention.
Description	When it comes to helping patients understand their health issues and integrate lifestyle changes and supplements into their lives, communication is key. This Group Business Coaching Call provides an opportunity for licensed providers to learn from fellow practitioners how best to use LMRC presentation pads as a tool for effective and engaging patient communication. Through this call, providers can gain practical strategies on how to use presentation pads to accurately explain health conditions, help patients fully understand their individual cases, engage them in the treatment process, and unlock the power of functional medicine with clear protocols that are easy for patients to follow through on. This Group Business Coaching Call offers a unique forum for learning and collaboration among practitioners, allowing them to share best practices, exchange knowledge, and ultimately hone their clinical communication skills with LMRC presentation pads tools!	Providers will gain valuable insights into how they can leverage LMRC patient handbooks to improve communication between themselves and their patients, allowing them to deliver more accurate healthcare information in an efficient manner. Additionally, attendees will receive tips on how best to educate their patients on lifestyle changes and supplement intake, so that patients have greater clarity about what steps need to be taken in order for them to achieve optimal wellness and wellbeing outcomes.	Attendees of this Group Business Coaching Call will benefit from access to exclusive Cardiometabolic content updates and hear from knowledgeable experts who can help them better understand how to best implement the new Cardiometabolic content. The call will also offer valuable insights into how to implement the patient education tools and bolster their own knowledge base through presentations and tools that can attract ideal clients. Additionally, attendees will have a chance to take part in a raffle giveaway for even more exclusive rewards!	By attending this call providers will gain access to comprehensive journey map templates which can help them create systems that streamline patient onboarding processes and ensure optimal outcomes for their practice. Additionally, attendees will learn how LMRC content plays an important role in developing successful patient journey mapping models and learn about effective strategies for implementing these journeys into their practice. Furthermore, the call will provide insights into how optimizing the patient journey can help increase compliance, satisfaction rates, and long-term retention rates among patients seen in their practice. Finally, participants will gain practical tips on how to make the most out of their patient onboarding so they can improve outcomes while still meeting financial goals during these challenging times.

LMRC GRAND ROUNDS + WEBINARS SCHEDULE

2023 Schedule

	Q1 JAN - MARCH	Q2 APRIL - JUNE	Q3 JULY - SEPT	Q4 OCT - DEC
Grand Rounds	Autoimmune Case Study <u>Review with Steve Amoils, MD</u> <u>February 7th @6:00pm 2023</u>	Cardiometabolic Case Study <u>Submission with Shilpa P. Saxena, MD</u> <u>May 9th @6:00pm 2023</u>	Chronic Infection Case Study <u>Submission with Elroy Vojdani, MD</u> <u>– August 8th @6:00pm 2023</u>	Bone/Joint/Muscle Case Study <u>Submission with Adrian den Boer, ND, DC</u> <u>– October 3rd @6:00pm 2023</u>
Webinars	Thomas G. Guilliams, PhD <u>Medicinal Mushrooms: Challenges and Conundrums for Clinical Implementation</u> Tuesday, March 28 6:00 p.m. - 7:00 p.m. CDT	Shilpa P. Saxena, MD <u>Cardiometabolic Risk: Beyond Lipids</u> Tuesday, May 30 6:00 p.m. - 7:00 p.m. CDT	Elroy Vojdani, MD <u>The Impact of Prolonged Infections on Immune Resilience</u> Tuesday, August 29 6:00 p.m. - 7:00 p.m. CDT	Adrian den Boer, ND, DC <u>The Connection Between Bone Health and Cardiovascular Disease</u> Tuesday, October 31 6:00 p.m. - 7:00 p.m. CDT

WEBINARS

2023 Schedule

	Q1: THOMAS G. GUILLIAMS, PHD: TUESDAY, MARCH 28 6:00 P.M. - 7:00 P.M. CDT	Q2: SHILPA P. SAXENA, MD TUESDAY, MAY 30 6:00 P.M. - 7:00 P.M. CDT	Q3: ELROY VOJDANI, MD TUESDAY, AUGUST 29 6:00 P.M. - 7:00 P.M. CDT	Q4: ADRIAN DEN BOER, ND, DC TUESDAY, OCTOBER 31 6:00 P.M. - 7:00 P.M. CDT
Title	MEDICINAL MUSHROOMS: CHALLENGES AND CONUNDRUMS FOR CLINICAL IMPLEMENTATION	CARDIOMETABOLIC RISK: BEYOND LIPIDS	THE IMPACT OF PROLONGED INFECTIONS ON IMMUNE RESILIENCE	THE CONNECTION BETWEEN BONE HEALTH AND CARDIOVASCULAR DISEASE
Objectives	• Briefly describe the parts of mushrooms and the constituents that can be isolated • Discuss historical therapeutic uses of mushrooms • Cover some of the difficulties in manufacturing efficacious mushroom supplements • Define an evidence-based strategy for medicinal mushroom use	• Define cardiometabolic risk • Introduce emerging concepts that contribute to risk • Define the functional medicine approach to assessing risk • Discuss the order of treatment prioritization for risk marker abnormalities • Present new therapeutic agents available to optimize cardiometabolic patient outcomes	• Define prolonged infections and immune resilience • Provide examples of commonly seen chronic infections that clinicians should be aware of when treating chronically ill patients • Compare and contrast acute versus chronic immune function during infection • Discuss prioritization of therapeutic intervention in chronic infection • Present top nutrients to treat those with chronic infections	• Introduce the connection between bone health physiology and cardiovascular disease • Discuss common patient types that require addressing both bone and cardiovascular health • Discuss how and when to test for cardiovascular risk in bone health patients • Identify priorities in intervention when both bone and cardiovascular issues are present • Present top nutrients for clinical use in these patients
Description	Description: Medicinal mushrooms have been leveraged for therapeutic benefit for many decades.However, contemporary lifestyles are generally more disconnected from nature and access to wild mushrooms, so we instead rely more heavily on manufactured supplements for clinical use. It may surprise many clinicians to learn that it is challenging to consistently manufacture clinically effective mushroom supplements. This webinar will cover some of the historical context of medicinal mushrooms, their clinical utility, and the industry challenges when producing efficacious products.	Description: Cardiometabolic risk assessment is a vital factor in patient care since cardiometabolic conditions can often be asymptomatic. Despite a lack of symptoms, the potential outcomes of cardiometabolic dysfunction can be complete loss of metabolic function or sudden death. However, traditional ways of assessing risk lack some key predictive factors that functional medicine providers can identify. Early detection of increased risk acutely raises the potential for lifestyle interventions to prevent the progression of cardiometabolic disease.	Most patients encounter infection at some point during their lives, but these encounters tend to be acute in nature. When a patient acquires a prolonged infection, it can have profound effects on the resilience of their immune system, leaving them vulnerable to more infectious assaults. This webinar will cover clinical examples of common chronic infections, their impacts on immune resilience, and strategies to identify and treat these patients.	Many patients are accustomed to seeing specialists for their ailments, yet few are taught to understand the connections between multiple body system dysfunctions. There are significant clinical connections between bone and cardiovascular health. This webinar will provide a review of these connections, strategies for prioritizing bone and cardiovascular health interventions, and supportive nutrients.

GRAND ROUNDS

2023 Schedule

	Q1	Q2	Q3	Q4
Title	Autoimmune Case Study Review with Steve Amoils, MD February 7, 2023	Cardiometabolic Case Study Submission with Shilpa P. Saxena, MD May 9, 2023	Chronic Infection Case Study Submission with Elroy Vojdani, MD – August 8, 2023	Bone/Joint/Muscle Case Study Submission with Adrian den Boer, ND, DC – October 3, 2023
Objectives	• Review the “Transforming Autoimmunity into Wellbeing” case study from the WellMatrix In-Practice Guide • Discuss the value and business opportunity of promoting the journey from sickness to wellbeing • Identify ways to keep patients engaged with lifestyle interventions after their initial episodic care	• LMRC members will submit difficult case studies for review, troubleshooting, and a clinical perspective on treatment intervention	• LMRC members will submit difficult case studies for review, troubleshooting, and a clinical perspective on treatment interventions	• LMRC members will submit difficult case studies for review, troubleshooting, and a clinical perspective on treatment interventions

FORUM

2023 Schedule monthly - first day of every month

		Q2	Q3	Q4								
Ti tl e	xx	x	xx	xx								
O bj e ct iv e s	• xx	• x	• xx	x	•	•	•	•	•	•	•	•

PODCASTS

2023 Schedule monthly - bi weekly

		Q2	Q3	Q4								
Ti tl e	xx	x	xx	xx								
O bj e ct iv e s	• xx	• x	• xx	x	•	•	•	•	•	•	•	•

Other Channels



- ▶ ● **Email**
- ▶ ● **Organic Search: SEO**
- ▶ ● **Paid Search: Social | Google Ads**
- ▶ ● **Web: landing Pages; LMRC updates; forms**
- ▶ ● **Webinars/Events/Podcasts**



Social Media

ORGANIC SOCIAL: OBJECTIVES

KPI

CTAs

Increase Awareness

Reach and Impressions
Increase Page Likes
(specific audiences)

Learn More | Learn How | Find How
| See How | Follow Us

Increase Traffic
to the website

Click Through Rate: 2 - 4%

Visit Us | Click Here

Increase Engagement
FB + IG

Engagement rate: 2%

Ask Us | Watch this Video

Increase Conversions
(Lead Conversions)

Conversion rate of
Event Sign Ups
Memberships
sales (Targetings pecific lists)

Sign Up | Get in touch with our
reps | Consultations

Increase Loyalty

Loyalty Customer Rate
Kits | CE Purchase Frequency

Contests | Referral | Recurring

Paid Social Objectives

Social Ads:



● Increase Awareness: followers

Impressions | Reach

● Drive Traffic to the Website

● Increase Engagement

Boost Posts

Clicks | CTR | ER

● Increase Conversions (leads)

Sign Ups - Form Submissions: Events
| Membership Sign Ups

KPI

Reach: 5K

ER: 1 - 4%

CTR: 2-4%

CPA:0.10\$

Awareness

Consideration

Conversions

Organic Search + Web Objectives

KPI

Sessions
Time on Page
Crawl-ability
LCP (load Speed)
CLS: Visual Stability
Page Authority
Keywords Ranking

SEO

Search Ranking

Improve Functionality + Performance

Security | Web Vitals | Site Speed | Mobile |

Improve User Journey

Appearance and navigation - web updates

Increase Average Time on Page

Paid Search Objectives

Google Ads

● **Increase Awareness**
Impressions Reach

● **Drive Traffic to the Website**
Visits | Sessions | CTR

● **Increase Conversions (leads)**
Scheduled Meetings with Patrick and Yaa

Awareness

Consideration

Conversions

KPI
Reach: 10-20K
CTR: 2-4%
CPA: 0.10\$
Keywords Ranking
CPC
Conversion Rate
Quality Score

Events | Webinars

Objectives

KPI
Reach:
CTR: 2-4%
Submissions
Clicks

Forum
Grand Rounds

● **Increase Awareness**
Impressions Reach

● **Drive Traffic**
Clicks| CTR

● **Increase Conversions**
Sign Ups

Awareness

Consideration

Conversions

Event Strategy - Campaign Sample

Integrate Channels | Adopt Organic and Paid Social and Search
Focus on Keynote Speakers and Partner with Brand Advocates

Pre - Event

Event

Post - Event

EMAIL | SOCIAL | PAID | WEB

AWARENESS:

- Announcements
- Promoted Posts

CONSIDERATION:

- Videos

CONVERSION:

- Registrations
- Sales
- Downloads

EMAIL | SOCIAL | PAID | WEB

CONSIDERATION:

Engagement

- Live chats | Group Conversations
- Promoted posts
- Community engagement

EMAIL | SOCIAL | PAID | WEB

CONSIDERATION:

Engagement
Lead nurturing

- Thank you notes
- Polls
- Surveys



Target Audience

By Brand | Industry | Specialty

Pain Points

Pros

Target Audience Segmentation:

Psychographics

Demographics

Geographics

Behavior

Persona

HubSpot - Buyer Persona

Customer Journey

Prizm Segmentation

Target Paid Social - In/FB

Maslow's Hierarchy of Needs

Conclusion

Ortho Molecular Products

Existing Customer (US/CA Accounts, Leads, Pharmace) - Source: Sales Team

New Customers - Trade Shows

Lifestyle Matrix Resource Center

Existing Customer - Source: ORTHO Sales Team

New Customers - Source: LMRC Sales Team

Social Media - Face Groups

OrthoPacks

Ortho Customers

New Customers

Learning about OMPI ideal customers - challenges, lifestyles, demographics. Buyers' persona provides structure and context - making it easier to map out content and achieve alignment across

Target Audience



Target Audience

B2B: Health Industries

OMPI



Women's



Essential



Cardiovascular



Endocrine



Musculoskeletal



Gastrointestinal



Immune



Specialty



Men's

LMRC



B2C: Doctors



OB - GYN



General Practitioner



Cardiologist



Endocrinologist



Chiropractor
Orthopedic



Gastroenterologist



Immunologist



xx



Urologist

PAIN POINTS

PRACTICE	• Doctors that are tired of the system • Practice Efficiency • Logistics (storage, processing, and shipping) • Lab interpretations & patient consults • Information management • Uncompensated time • Financial counseling and related friction with patients
PRODUCTIVE CAPACITY & USE OF TIME	• Devote far more time to patient visits and related work • Fail to leverage their time with support staff or care team providers
TIME ALLOCATED FOR NEW PATIENTS	• Attends IFM + Webinars + Podcasts.
PATIENTS SEEN ON TYPICAL WORKDAY	• FM: 7-14 • Survey of AMerica's Physicians: 19.5

PAYMENT	• Relying heavily on cash fee for service • Many dedicated FM physicians have experienced insurance and medical board scrutiny and even more likely have liability exposure.
PERSONAL INCOME	• For non-physicians, pursuing and achieving IFM certification equates to a significant income boost. • For physicians, dedication to FM almost always leads to income reduction. • Attitudes about money and affordability of FM have significant impact on income. • Practitioners need help with marketing. • Practitioners do not know how to market their practices. • Inability to affordably generate and capture demand • Challenges monetizing broad scope of capabilities

STRENGTHS

- The more dedicated a practitioner is to Functional Medicine, the lower their patient volume.
- FM practitioners are huge adopters of virtual visits – creating a significant education opportunity around technology and compliance.
- The more advanced the practitioner, the more services and capabilities they attempt to offer.
- Patient education is a significant strategic opportunity.
- Health coaching and digital health tracking are gaining momentum.

Target Audience Segmentation

Demographics

Age: 44-56 yrs. old

Gender: 65% females

Income: \$130 - 170K/yr.

Employment: works solo or in small groups

Psychographics

A general orientation toward women's health

Activities: work long hours; enjoy studying, research FM

Personality: Inquisitive
Interests: Integrative Medicine| natural health/nature, wellness, balance

Attitude: determined, observant, brave, genuine, independent.

Lifestyles: active, grounded,

Geographics

Regional: EA Central, South, SE, NW, NE, MidAtlantic, Central, SW, NE, SE, South,

National: US, Accounts + Leads Pharmacy

International: CA
Accounts/Leads/Pharmace

Behavior

In practice pharmacy: online + in office

Early Adopters of advanced labs

Practice solo or in small groups

WOM believers (influencers, sales, speakers)

Attend Trade Shows

Subscribe to scientific publications.
Eager to learn.

Personas

MD | DO | ND | NP | NURSE PRACTITIONER | NUTRITIONAL PROFESSIONAL | PHYSICIAN ASSISTANT | HEALTH COACHES | DIGITAL/TRADITIONAL INFLUENCERS



Adele

Seasoned Owners

54 years old
Income: \$166K/yr

- Confident
- Committed
- Passionate
- Assertive
- Retire later
- Most satisfied
- Innovators
- Embrace New Tech
- Owners
- Reads Toms Standard
- Subscribed to Scientific Publications
- Attends Trade Shows



Debbie

Committed PCPs

48 years old
Income: \$168K/yr

- Passionate
- Successful
- working in small groups
- Confident about charging accordingly.
- Spend the same amount of time as Laggards and Novices
- Charge twice as much
- Follows Carrie Jones
- Attends Webinars
- Listens to Podcasts



Jennifer

Hungry Novices

48 years old
Income: \$143K/yr

- In transition phase
- Optimistic
- Committed to FM
- Tech Savvy
- Open to new ideas
- Not yet confident
- Works in group settings
- Needs mentorship
- Joins Facebook Groups
- Attempts to join Trade Shows, Webinars
- Information overload



James

Nervous Laggards

48 years old
Income: \$135K/yr

- Largest segment
- Struggles the most
- Not confident with tech, business or FM application
- Lacks the confidence on charging fair prices
- Not many services
- Limited course of action
- Needs mentorship.
- Not daring
- Burdened by self-limiting beliefs and attitudes.
- Conflicted and unsure of who to trust, what to follow, and what is credible



Charlotte

Canadian

48 years old
Income: \$110K/yr

- Transparent
- Direct
- Skeptical
- Private
- practical by nature
- Passive by nature
- Attends IFM + Webinars + Podcasts.

Personas

BEHAVIORAL SEGMENTATION



SEASONED OWNER

NETWORKED NEIGHBORS



NAME

Adele

AGE

54

LOCATION

Vermont | Suburban

OCCUPATION

MD:
Chronic Disease Specialist

INCOME

\$166K

EDUCATION

Graduate Plus

LIFESTYLE

Visits Europe | Speaker

BEHAVIOR	- Assertive - Committed - Passionate - Most Satisfied - Laid Back
PRACTICE	- Practices Solo/Owner or in small group 2-3 - Relies on cash. - Embraces New Tech - Retires at a later age.
INTERESTS	- Attends IFM/PLMI/IHS Trade Shows - Reads Toms's "The Standard Monograph Series" - Subscribed to Scientific Publications - Speaker at live events - Consumes information at leisure. - Follows Dr. Bland
SOCIAL GROUP	Elite Suburbs
LIFESTYLE STAGE GROUP	Affluent Empty Nests

ORTHO	Has been a customer for a long time Opens all the messages from Aaron. Expects Blitz Campaigns Awareness + Loyalty funnel stage Opens PLMI/IHS/ IFM emails Has a strong relationship with Account Exec sales for info/products (Not very interested about promotional emails)
LMRC	Most likely a member Close to Tom's level, doesn't write but enjoys reading scientific papers. Would be interested in receiving White papers and events info.
ORTHO PACKS	One of the first to sign up for OrthoPacks Would open the launch emails. Would want to know more about this at the TradeShows Would most likely interact with Nate at the events. Would research everything about OrthoPacks/concept.
NOTE	Risks: Compares brands trust the ones with most scientific research.

COMMITTED PCP
EXECUTIVE SUITES



NAME	Debbie
AGE	48
LOCATION	Connecticut
OCCUPATION	MD or Pharmacist
INCOME	\$168K
EDUCATION	Graduate Plus
LIFESTYLE	Professional (chipotle)

BEHAVIOR	• Passionate • Successful • Believes that provides value
PRACTICE	• Not prioritizing business ownership • Working in small groups • Confident about charging accordingly. • Spends the same amount of time with patients as Laggards and Novices • Charges twice as much • Either is owner or works for Adele
INTERESTS	• Follows Carrie Jones • Attends Webinars • Listens to Podcasts • Follows Mark Hyman
SOCIAL GROUP	The Affluentials
LIFESTYLE STAGE GROUP	Accumulated Wealth

ORTHO	Existing Customer Similar to Adele + attends more webinars/pharmaceutical webinars/symposiums. Opens Has a good relationship with sales rep + opens up promotional emails.
LMRC	Most likely a member Interested in all the info related to events. Membership is not advanced enough for her. Sometimes joins group visits. Consumes info from digital channels
ORTHO PACKS	Would consider signing up for OrthoPacks Will definitely sign up for OrthoPacks. Will see OrthoPacks as a way to generate revenue and saving time. Will share this with her Network
EVOMED	Only consumes what she needs/Business mindset (selfish) that's why she is successful.

HUNGRY NOVICE

YOUNG DIGERATI



NAME	Jennifer
AGE	48
LOCATION	Portland
OCCUPATION	Nurse Practitioner + Health Coach
INCOME	\$143K
EDUCATION	Graduate Plus
LYFESTYLE	Owns an Audi Eats at California Pizza Kitchen Uses Yelp Flies United

BEHAVIOR	• Optimistic • Tech Savy • Committed to FM • Not yet confident • Information overload
PRACTICE	• In transition phase • Open to new ideas (management + clinical) • Feel guilty for charging for their time and profiting from supplement sales and lab sales • Work in group settings • Offer the least diversified scope of services • Struggles the most in implementing the FM model • Needs practice implementation and mentorship
INTERESTS	• Joins Facebook Groups • Attempts to join both Tradeshow and Webinars
NOTES	• Jennifer needs help to become Debbie.
SOCIAL GROUP	Urban Uptown
LIFESTYLESTA GE GROUP	<u>Midlife Success</u>

ORTHO	Probably a Customer
LMRC	Probably a member Joins Facebokk Groups Opens podcast/webinars emails Interested in Patrick and Yaa phone calls Joins Facebook Group Visits.
ORTHO PACKS	Would be interested in signing up for OrthoPacks
NOTES	Opportunity Jennifer via paid social, paid search Jenny - on social channels

NERVOUS LAGGARDS

NEW HOMESTEADERS



NAME	James
AGE	48
LOCATION	Chicago
OCCUPATION	Chiropractor
INCOME	\$135K
EDUCATION	Graduate Plus
ILIFESTYLE	Owns a Nissan Follows College Sports Professional

BEHAVIOR	• Largest Segment • Needs mentorship • Not daring • Burdened by self-limiting beliefs and attitudes. • Conflicted and unsure of who to trust, what to follow, and what is credible	ORTHO	Probably not a customer Switches back and forth between companies. Made one promotional purchase. Counted as a lead. In Churn list.
PRACTICE	• Struggles the most on how to own and operate a FM practice. • Not confident with tech, business or FM application • Lacks the confidence on charging fair prices for their services. • Not offering a wide range of services/products • limited course of action	LMRC	Probably Not a member Aware from digital channels. Saves blogs. Heard about from Jennifer. Doesn't trust Jennifer but want wants to be Debbie. Thinks is like Debbie.
INTERESTS	• Stuck between conventional medicine and functional medicine. • Takes his info from LinkedIn	ORTHO PACKS	Needs to understand what it is and how it can help him. Will be most confused about ortho Packs. Thinks it's a whole different company.
NOTES	• Needs LMRC support and guidance (handholding) • Needs more time to understand the benefits of Lifestyle Matrix and sign up for Personalized Nutrition.	NOTES	Cannot keep up Not aware of his painpoints Gullible
SOCIAL GROUP	Landed Gentry		
LIFESTYLES TAGE GROUP	<u>Accumulated Wealth</u>		

CANADA



NAME	Charlotte
AGE	45
LOCATION	Ontario
OCCUPATION	Naturopathic Doctor Pharmacist
INCOME	\$115K
EDUCATION	Graduate
ILIFESTYLE	Goes Skiing Travels to Europe

BEHAVIOR	• Transparent • Direct • Skeptical • Private • practical by nature • Passive by nature
PRACTICE	Unknown
INTERESTS	• Attends IFM + Webinars + Podcasts. • Brand Management Knowledge

ORTHO	Maybe a customer Doesn't like to be bombarded with emails. Attends Pharmace Webinars. Either unsubscribed or in Junk folder.
LMRC	Not aware about LMRC. Gets the blogs and is confudes why she is getting them. Probably unsubscribed wich unsubscribed her from Ortho as well.
ORTHO PACKS	Not sure if the launch campaign will reach her.
NOTES	Consider to have different segmentations for Canada as well to increase reach. Slmilar to Debbie. Only consumes what she needs

Personas

BYER PERSONA





Job Title

FM Practice Owner

Age

55 to 64 years

Highest Level of Education

Doctorate (e.g. PhD, EdD)

Social Networks



Industry

Health Care

Organization Size

1-10 employees

Adele

Preferred Method of Communication

- Face-To-face
- Phone

Their Job Is Measured By

Supplements Sales | Lab Sales | Existing Patients | Speaker

Job Responsibilities

High Level Practice Management | Education

Goals or Objectives

Netwroking, Qualitative Research, Maintain her practice

Reports to

Owner

They Gain Information By

Research, Scientific White Papers, Standard, Trade Shows, Traditional marketing



Job Title

Functional Medicine MD

Age

45 to 54 years

Highest Level of Education

Doctorate (e.g. PhD, EdD)

Social Networks



Industry

Health Care

Organization Size

1-10 employees

Debbie

Preferred Method of Communication

- Phone
- Email
- Face-To-face

Tools They Need to Do Their Job

- Accounting and Bookkeeping Systems
- Content Management Systems
- Cloud-Based Storage & File Sharing Applications
- Employee Scheduling Software
- Word Processing Programs
- Business Intelligence Dashboards
- Project Management
- Email
- Invoicing Software
- Reporting Software

Job Responsibilities

Manages people, sees patients, uses LMRC slide decks, oversees practice management duties.

Their Job Is Measured By

The job is measured by the amount of patients she sees per day (7)

Reports to

Debbie is either an owner or report to Adele. Ready to have her own practice.

Goals or Objectives

To have her own practice.

They Gain Information By

Podcasts, Webinars, Needs to be a part of Pharmacy and LMRC

Biggest Challenges

- Navigating Client Relationships & Communications
- Communication
- Project Management & Disorganization
- Problem Solving & Decision Making
- Resources
- Change Management
- Collaboration & Creativity
- Professional Development



Job Title

Nurse Practitioner

Age

45 to 54 years

Highest Level of Education

Doctorate (e.g. PhD, EdD)

Social Networks



Industry

Health Care

Organization Size

11-50 employees

Jennifer

Preferred Method of Communication

- Email
- Text Messaging
- Social Media
- Face-To-face
- Phone

Tools They Need to Do Their Job

- Content Management Systems
- Project Management
- Email

Job Responsibilities

Increasing patient visits. Reducing amount of time spent with patients. Increasing supplements sales

Their Job Is Measured By

Patients Visits

Reports to

Debbie



Goals or Objectives

Personal Growth

They Gain Information By

Webinars, Facebook Groups, TradeShows,

Biggest Challenges

- Communication
- Project Management & Disorganization
- Collaboration & Creativity
- Professional Development



Job Title

Chiropractor Partner

Age

35 to 44 years

Highest Level of Education

Doctorate (e.g. PhD, EdD)

Social Networks



Industry

Health Care

Organization Size

11-50 employees

James

Preferred Method of Communication

- Text Messaging
- Email

Tools They Need to Do Their Job

- Accounting and Bookkeeping Systems
- Content Management Systems
- Cloud-Based Storage & File Sharing Applications
- Employee Scheduling Software
- Word Processing Programs
- Business Intelligence Dashboards
- Reporting Software
- Invoicing Software
- Email
- Project Management
- CRM Software

Job Responsibilities

Patient Visits



Reports to

Partner/Corporate Office (franchise)

Their Job Is Measured By

Amount of patients visits per day.

They Gain Information By

Digital Marketing

Goals or Objectives

Growth/ Own his practice/ Increase Sales/Revenue/ Status

Biggest Challenges

- Navigating Client Relationships & Communications
- Employee Morale
- Communication
- Project Management & Disorganization
- Problem Solving & Decision Making
- Resources
- Change Management
- Collaboration & Creativity
- Professional Development



Job Title

Naturopathic Doctor | Pharma

Age

45 to 54 years

Highest Level of Education

Professional degree (e.g. MD,

Social Networks



Industry

Pharmaceutical

Organization Size

1-10 employees

Charlotte

Preferred Method of Communication

- Phone
- Face-To-face
- Social Media

Tools They Need to Do Their Job

- Accounting and Bookkeeping Systems
- Content Management Systems
- Employee Scheduling Software
- Project Management
- Invoicing Software

Job Responsibilities

Improving the quality of life.

Their Job Is Measured By

By patients morale/success rate

Reports to

She is the Owner/ might have a Partner



Goals or Objectives

Wants to naturally reintroduce the practice of functional medicine.

They Gain Information By

Books, Scientific research/publications.

Biggest Challenges

- Communication
- Collaboration & Creativity
- Professional Development

Customer Journey

Demographics

xx

Psychographics

xx

Geographics

xx

Behavior

In practice pharmacy: online + in office

Early Adopters of advanced labs

Practice solo or in small groups

WOM believers (influencers, sales, speakers)

Attend Trade Shows

Subscribe to scientific publications.
Eager to learn.

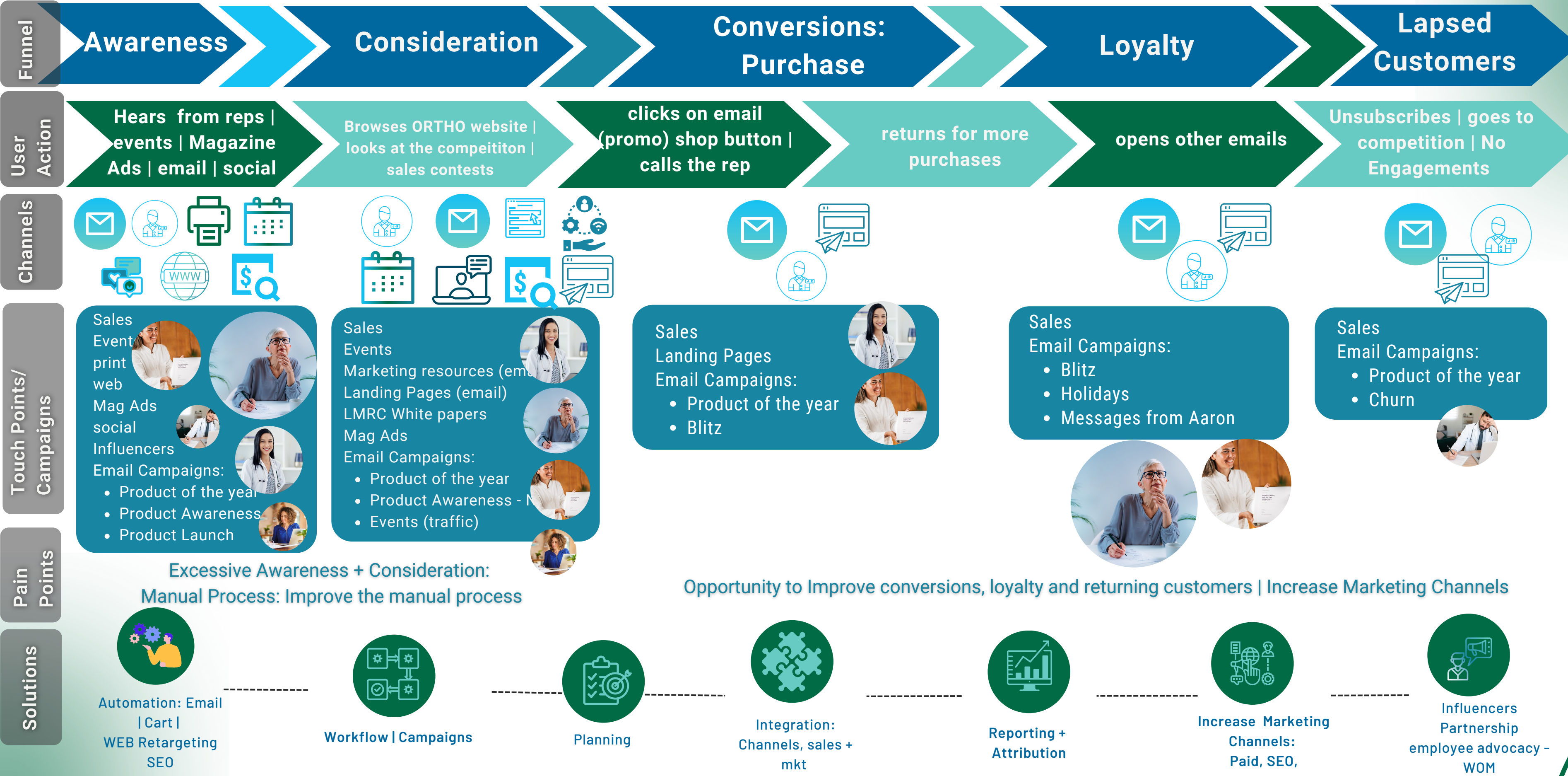
Target Segmentation - Ads



MEDICAL FIELD	Industry	Interests	Programs
CARDIOLOGISTS	Health Wellness	The Institute for Functional Medicine (medical education)	Cardiometabolic
IMMUNOLOGIST	Hospitals Healthcare	Healthcare	Immune
CHIROPRACTOR ORTHOPEDISTS	Medical Practice	Supplements	Musculoskeletal (MSK)
GASTROENETORLOGIST	Pharmaceuticals	Institute for Integrative Nutrition	Gastro Intestinal (GI)
ENDOCRINOLOGIST	Mental Health Care	Vitamins	Stress Recovery (SOS)
GENERAL DOCTOR	Biotechnology	Health & Wellness	HEALTH RESILIENCY (WELLMATRIX)

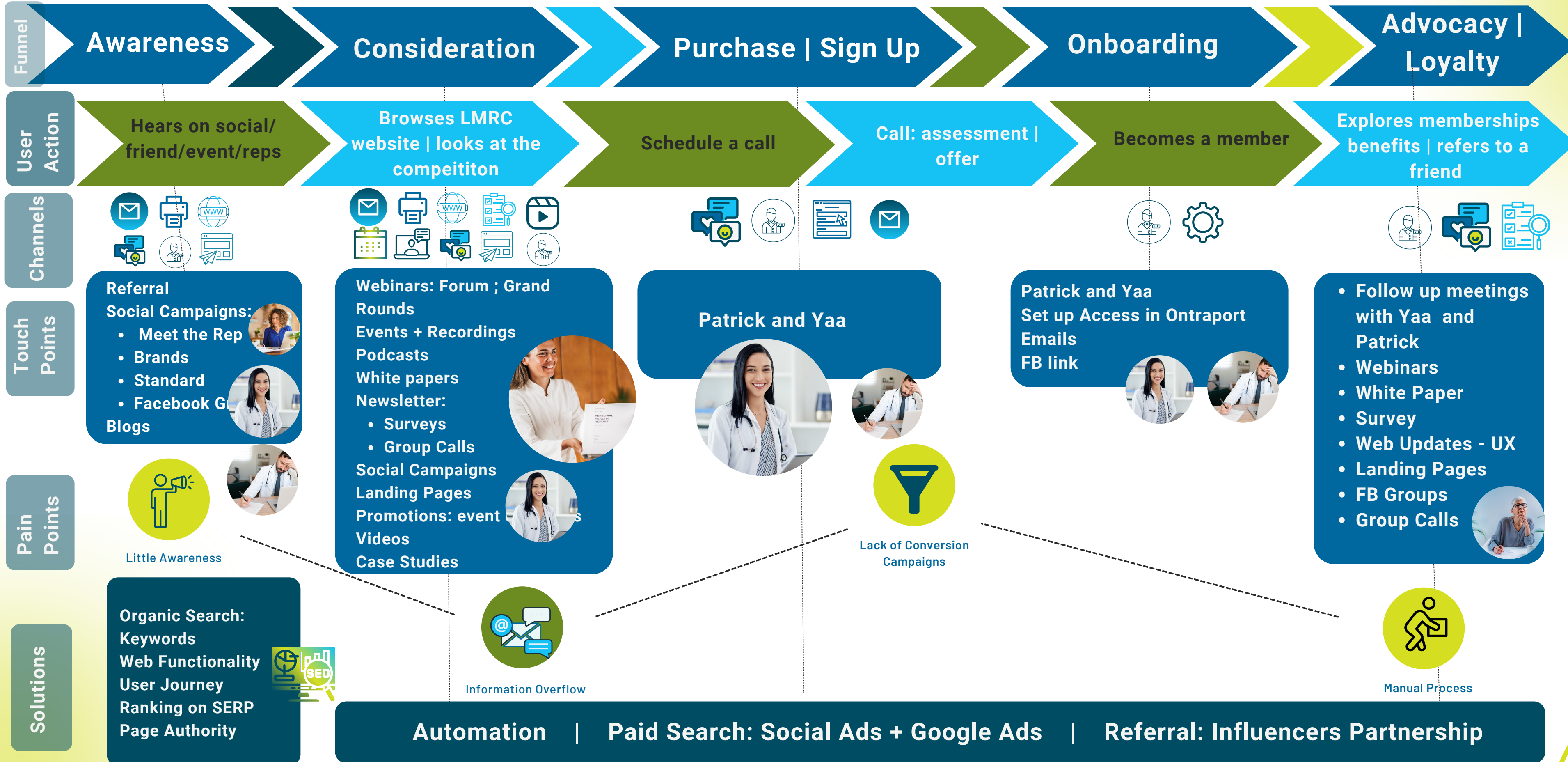
ORTHO CUSTOMER'S JOURNEY + EMAIL ACTIVITY

Marketing Funnel | Channels | User Action | Touch Points | Pain Points | Solutions



LMRC CUSTOMER'S JOURNEY

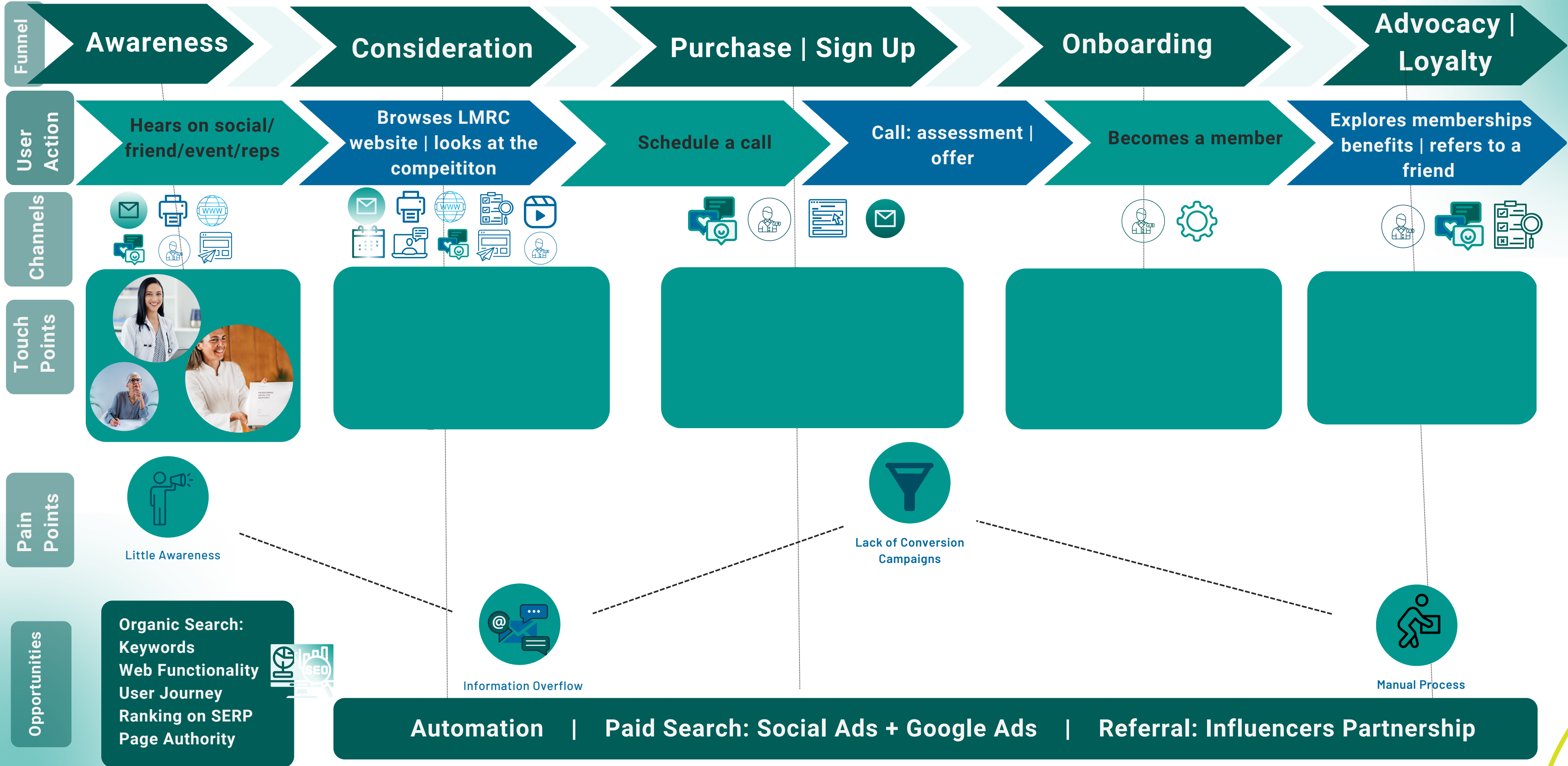
Marketing Funnel | Channels | User Action | Touch Points | Pain Points | Solutions





ORTHOPACKS

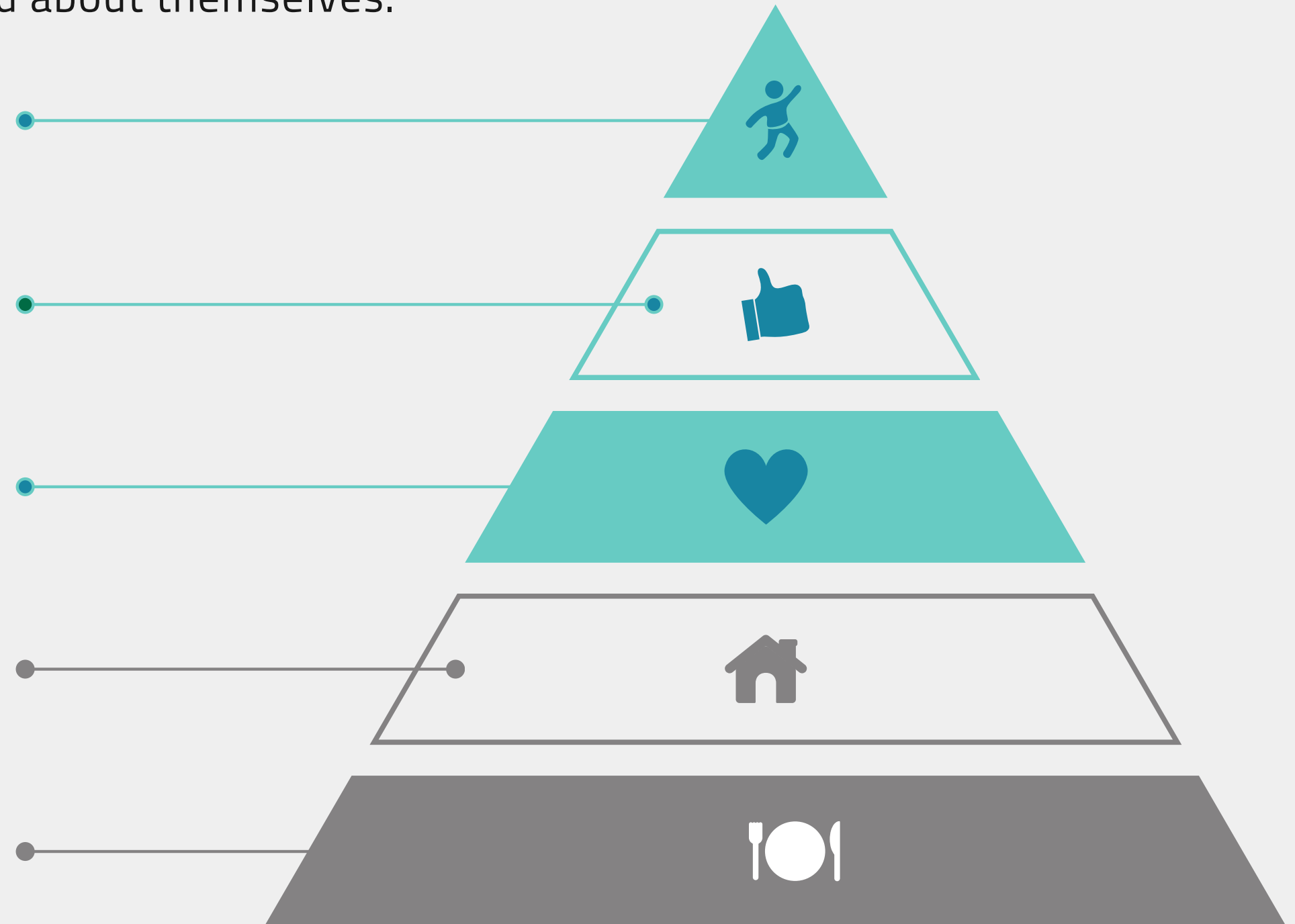
Marketing Funnel | Channels | User Action | Touch Points | Pain Points | Solutions



Maslow's Hierarchy of Needs

- Maslow's Hierarchy of Needs
Target audience is at the upper level of Maslow's Hierarchy of needs : Love, Belongingness and Self - Actualization .
- Opportunity to influence and help the target achieve their personal self-actualization and self esteem - feel good about themselves.

- 1 Self-Actualization
- 2 Esteem
- 3 Love and Belongingness
- 4 Safety
- 5 Physiological Needs



Need to address specific pain points at specific times for specific audiences by providing needed content.

LMRC is currently targeting Jennifer but reaching James.
Jennifer needs the help to advance in her career to Debbie's status.

Conclusion

Need to nurture Adele by providing Loyalty Content. Potential Influencer

James needs the most guidance and support but is not ready for a change.

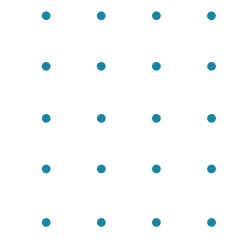
Using Adele to target James, James want to be like Debbie. He perceives the info from Adele to be from Jennifer. Doesn't trust Jennifer





Next Steps

Blocks



During The Automation Onboarding

- Automation Email Tech (Digital Marketing Email Specialist)
- Might need more assistance from HubSpot
- Data Cleaning

Time - Multiple projects

- Focused on improving the process to save time for "A Minute to Think"
 - Strategy

Team

- Operation + Creativity

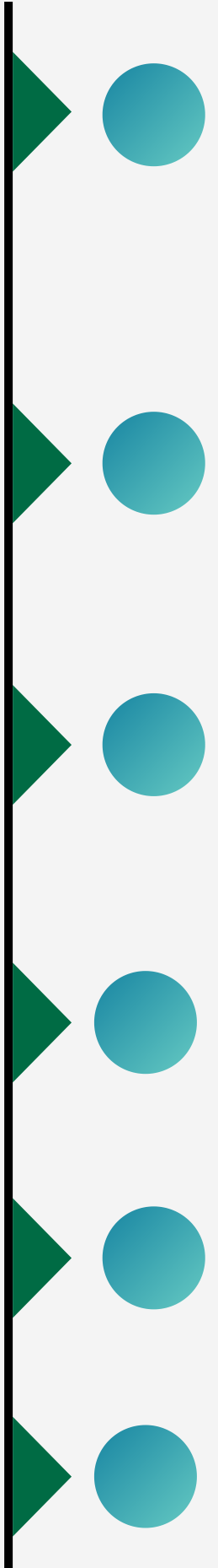
[Next Steps]

2 Strategic Approaches:

1. Improving what we have (tactical level)
2. Improving processes at the foundation level

Continue improving

Start major changes in Q2 - A/B testing | workflows and automation; Data Cleaning (propose 2-3 companies)



Planning on HubSpot Automation | Workflow and LMRC Sales Pipeline

**Audience Segmentation + Message Personalization
Clean Data**

Dynamics Nav HubSpot - Alignment - Attribution

Create Briefs for every campaign

Incorporate SEO in landing pages for Ortho and LMRC

Annual Reporting - January 2024

[Summary of Achievements]

- **Planning: objectives + strategy to align with tactics emails**
- **Process: WMJ | HubSpot Campaigns | Briefs | Team Alignment**
- **Templates**
- **Social Strategy + Framework + Reporting**
- **Dynamics + HubSpot Sync**
- **Eliminated an email threat: unsubscribes**
- **UX - LMRC**

[Summary of Achievements January 2023]



Continuing HubSpot Sales/Mkt Alignment: included Lauren and Yaa in the meetings.



Process: WMJ - added 2 SEO steps for Product Launches



Aligned on a Landing Page for Product Awareness



Continuing with The LMRC Social Strategy and Framework



Continuing with HubSpot Campaigns



Started HR marketing plan



CM Vitals Campaigns

The background features a light gray gradient with teal abstract shapes. On the left, a large teal shape curves from the top left towards the center, with a solid teal circle positioned below it. On the right, another teal shape curves from the bottom right towards the center, with a solid teal circle positioned above it.

THANK
YOU

