

TARGET AUDIENCE SEGMENTATION

PERSONAS

 **ORTHO
MOLECULAR
PRODUCTS®** **Ortho Packs**

Agenda



- Target Audience by Brand | Industry | Specialty
- Pain Points
- Strengths
- Target Audience Segmentation: Psychographics | Demographics | Geographics | Behavior
- Personas:
 - IFM: Survey of Functional Medicine Practitioner
 - HubSpot Buyers Persona
 - Claritas Behavioral Segmentation
- Customer Journey
- Maslow's Hierarchi of Needs
- Lead Qualification Matrix
- Social Ads Profiles : In | Fb | Ig
- Conclusions



Target Audience by Brand | Industry | Specialty



A large teal shape on the left side of the slide, including a semi-circle and a smaller circle below it.

 **Who is our Target Audience?**
Why is it important to know?

Ortho Molecular Products

Learning about OMPI ideal customers - challenges, lifestyles, demographics and psychographics.

Buyers' Persona - provides structure and context - making it easier to map out content and achieve alignment across depts. and increase sales.

Existing Customer (US/CA Accounts, Leads, Pharmace) - Source: Sales Team
New Customers - Trade Shows Leads / Trade Ads

Lifestyle Matrix Resource Center

Existing Customer - Source: ORTHO Sales Team
New Customers - Source: LMRC Business Development Team/Digital

OrthoPacks

Ortho Customers
New Customers

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

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 • Need digital guidance to grow revenue
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 • 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



STRENGTHS

- The more dedicated a practitioner is to Functional Medicine, the lower their patient volume - the higher the value.
- 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

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

-  **IFM: Survey of Functional Medicine Practitioner**
-  **HubSpot Buyers Persona**
-  **Claritas Behavioral Segmentation**

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

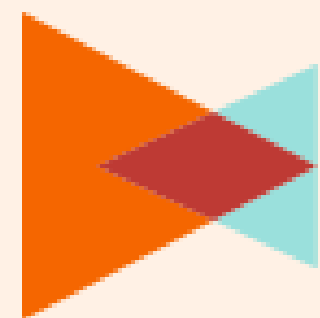
Canadian

48 years old
Income: \$110K/yr

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



**SURVEY OF FUNCTIONAL
MEDICINE PRACTITIONER**



claritas

BEHAVIORAL SEGMENTATION

HubSpot

BUYERS PERSONA

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	c
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. At the Trade Shows would speak to Nate or a Brand Manager about Ortho/LMRC/OrthoPacks



01 - Upper Crust

Wealthy Mature w/o Kids

The nation's most exclusive address, Upper Crust is a haven for wealthy empty-nesting couples over the age of 65. This segment has a high concentration of residents earning over \$100,000 a year and many possess a postgraduate degree. They have an opulent standard of living - driving expensive cars, frequently eating out at upscale restaurants, and traveling to destinations like Europe.



Social Group : 04 - S1 Elite Suburbs
Lifestage Group : 08 - M1 Affluent Empty Nests

- Snapshot
- Neighborhood Demographics
- Household Demographics
- Lifestyle
- Media

2022 Statistics

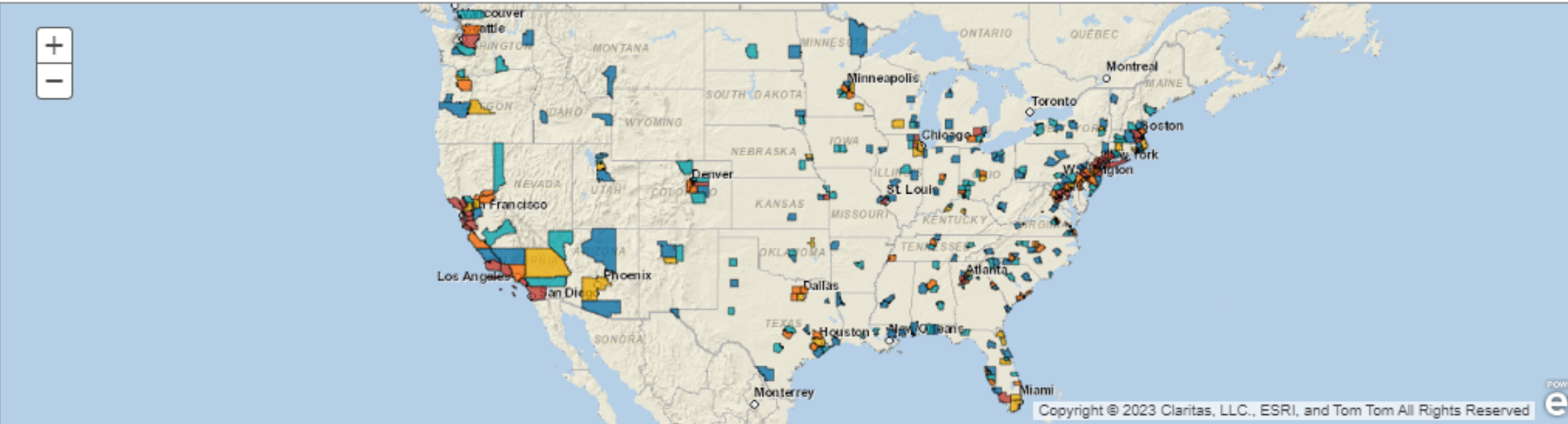
US Households: 1,314,956
Median Household Income: \$142,360

Demographics Traits

- Urbanicity : Suburban
- Income : Wealthy
- Income Producing Assets : Millionaires
- Household Technology : 2 Above Average
- Age Ranges : Age 65+
- Presence of Kids : w/o Kids
- Homeownership : Homeowners
- Employment Levels : Mostly Retired
- Education Levels : Graduate Plus

Lifestyle & Media Traits

- Owns a Lexus
- Eat at California Pizza Kitchen
- Shops at Chico's
- Contributes to public radio, TV, etc.
- Visits Europe
- Watches White House Correspondents Dinner
- Listens to All News



Top 5 Counties	
Name	Index
Marin County	1194
Fairfax County	667
Nassau County	598
Montgomery County	564
Fairfax city	506

Legend			
	%Comp	%Pen	Index
Quintile 1	57.71	4.90	290
Quintile 2	22.77	1.94	115
Quintile 3	11.78	1.00	59
Quintile 4	6.03	0.50	30
Quintile 5	1.71	0.14	9



Job Title

FM Practice Owner

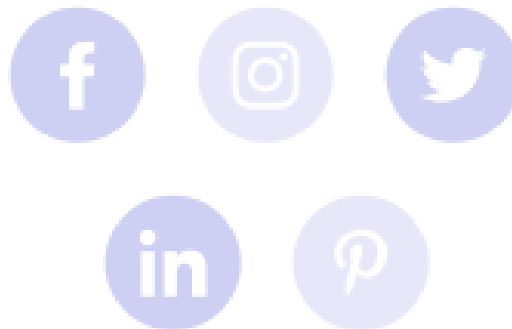
Age

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

N Networking Qualitative Research, Maintain her practice

Reports to

Owner

They Gain Information By

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

How to Communicate

- Prefers scientific backup.
- Prefers to hear from her sales rep.

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
<u>LIFESTYLE</u> <u>STATUS</u> <u>GE GROUP</u>	Accumulated Wealth

ORTHO	Existing Customer Similar to Adele + attends more webinars/pharmace 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
NOTE:	Only consumes what she needs/Business mindset (selfish) that's why she is successful.



10 - Executive Suites

Upscale Middle Age Mostly w/ Kids

The residents of Executive Suites tend to be prosperous and active professionals who are above average in their use of technology, following sports on Instagram and Twitter. Executive Suites use the internet to purchase tickets for sporting events and often stop at quick service restaurants for a bite to eat.



Social Group : 05 - S2 The Affluentials
Lifestage Group : 04 - F1 Accumulated Wealth

Snapshot

Neighborhood Demographics

Household Demographics

Lifestyle

Media

2022 Statistics

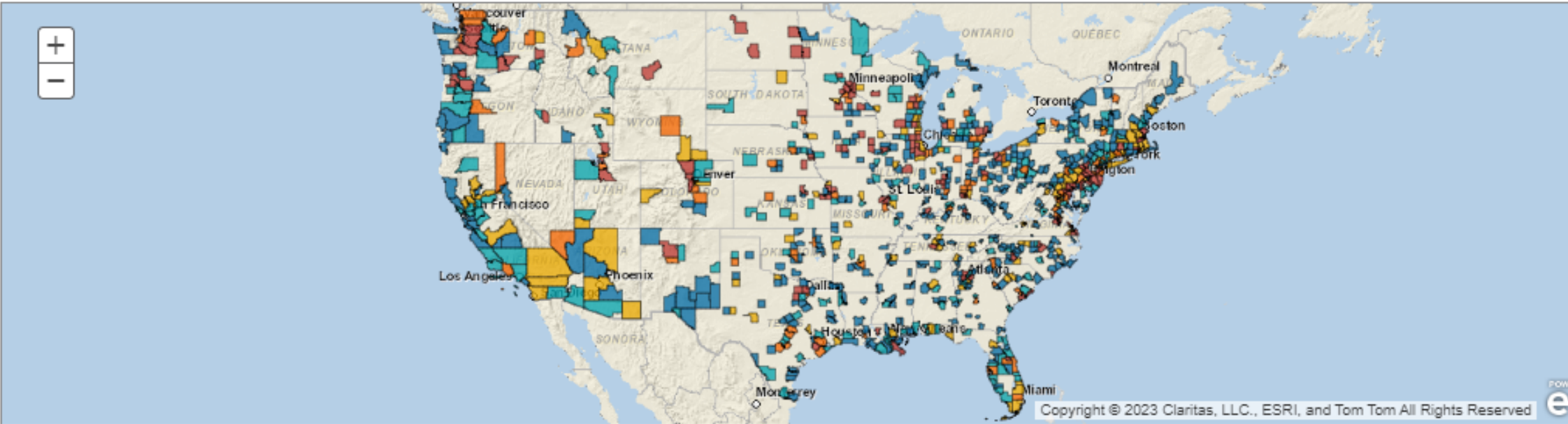
US Households: 1,644,584
Median Household Income: \$101,272

Demographics Traits

- Urbanicity : Metro Mix
- Income : Upscale
- Income Producing Assets : Elite
- Household Technology : 2 Above Average
- Age Ranges : Age 35-54
- Presence of Kids : Mostly w/ Kids
- Homeownership : Homeowners
- Employment Levels : Management and Professional
- Education Levels : Graduate Plus

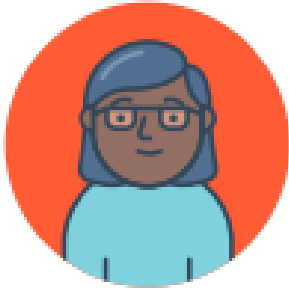
Lifestyle & Media Traits

- Owns a Mazda
- Eats at Chipotle
- Shops at Express/Express for Men
- Follows sports on Instagram and Twitter
- Stays at the DoubleTree
- Buys sporting events tickets online
- Listens to Sports Radio



Top 5 Counties	
Name	Index
Davis County	439
Kendall County	420
Washington County	396
Anchorage Municipality	391
DuPage County	387

Legend			
	%Comp	%Pen	Index
Quintile 1	46.46	3.71	233
Quintile 2	23.76	2.02	127
Quintile 3	18.94	1.42	89
Quintile 4	8.73	0.69	44
Quintile 5	2.12	0.17	11



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.

How to Communicate

- Prefers direct communication that will impact her business growth.
- Tell her what she needs to know

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

HUNGRY NOVICE

YOUNG DIGERATI



NAME	Jennifer
AGE	48
LOCATION	Portland
OCCUPATION	Nurse Practitioner + Health Coach
INCOME	\$143K
EDUCATION	Graduate Plus
LYIFESTYLE	Owens 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
LIFESTYLESTAGE GROUP	<u>Midlife Success</u>

ORTHO	Probably a Customer
LMRC	Probably a member Joins Facebook Groups Opens podcast/webinars emails. Interested in Patrick and Yaa's 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. Ideal LMRC customer – ready to close the deal.



04 - Young Digerati

Wealthy Younger Mostly w/ Kids

Young Digerati are tech-savvy and live in fashionable neighborhoods on the urban fringe. Affluent and highly educated, Young Digerati communities are typically filled with trendy homes and condos that are owned rather than rented. They believe in living ecofriendly lifestyles and enjoy dining at organic/health food restaurants, coffee houses and other trendy establishments.



Social Group : 01 - U1 Urban Uptown
Lifestage Group : 01 - Y1 Midlife Success

Snapshot

Neighborhood Demographics

Household Demographics

Lifestyle

Media

2022 Statistics

US Households: 1,840,956
Median Household Income: \$174,416

Demographics Traits

- Urbanicity : Urban
- Income : Wealthy
- Income Producing Assets : Millionaires
- Household Technology : 2 Above Average
- Age Ranges : Age 25-44
- Presence of Kids : Mostly w/ Kids
- Homeownership : Homeowners
- Employment Levels : Management and Professional
- Education Levels : Graduate Plus

Lifestyle & Media Traits

- Owns an Audi
- Eat at California Pizza Kitchen
- Shops at Crate & Barrel
- Attends college sports events
- Flies United
- Uses Yelp
- Listens to Adult Alternative



Top 5 Counties	
Name	Index
San Francisco County	685
Arlington County	673
Santa Clara County	548
Alexandria city	521
District of Columbia	520

Legend			
	%Comp	%Pen	Index
Quintile 1	50.50	12.03	311
Quintile 2	29.85	5.07	131
Quintile 3	12.08	2.42	62
Quintile 4	6.02	1.09	28
Quintile 5	1.54	0.29	8



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 supplement sales

Their Job Is Measured By

Patients Visits

Reports to

Debbie

How to Communicate

- Jennifer is open to different types of communications as long as it can help her progress and make a decision.
- She will respond to social ads.

Goals or Objectives

Personal Growth

They Gain Information By

Webinars, Facebook Groups, TradeShows,

Biggest Challenges

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

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
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
INTERESTS	• Stuck between conventional medicine and functional medicine. • Takes his info from LinkedIn
NOTES	• Needs LMRC support and guidance (handholding) • Needs more time to understand the benefits of Lifestyle Matrix and sign up for Personalized Nutrition.
SOCIAL GROUP	Landed Gentry
LIFESTYLESTA GE GROUP	<u>Accumulated Wealth</u>

ORTHO	Probably not a customer Switches back and forth between companies. Made one promotional purchase. Counted as a lead. In Churn list.
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.
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	Cannot keep up Not aware of his pain points Gullible



15 - New Homesteaders

Upscale Middle Age Mostly w/ Kids

Middle-age, upscale families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships. With post-graduate education and management positions, these dual-income couples have fashioned comfortable, child-centered lifestyles; their garages are filled with sporting goods and equipment, their houses with the latest technological gadgets which they use for online shopping and following their favorite sports teams.



Social Group : 11 - T1 Landed Gentry
Lifestage Group : 04 - F1 Accumulated Wealth

Snapshot

Neighborhood Demographics

Household Demographics

Lifestyle

Media

2022 Statistics

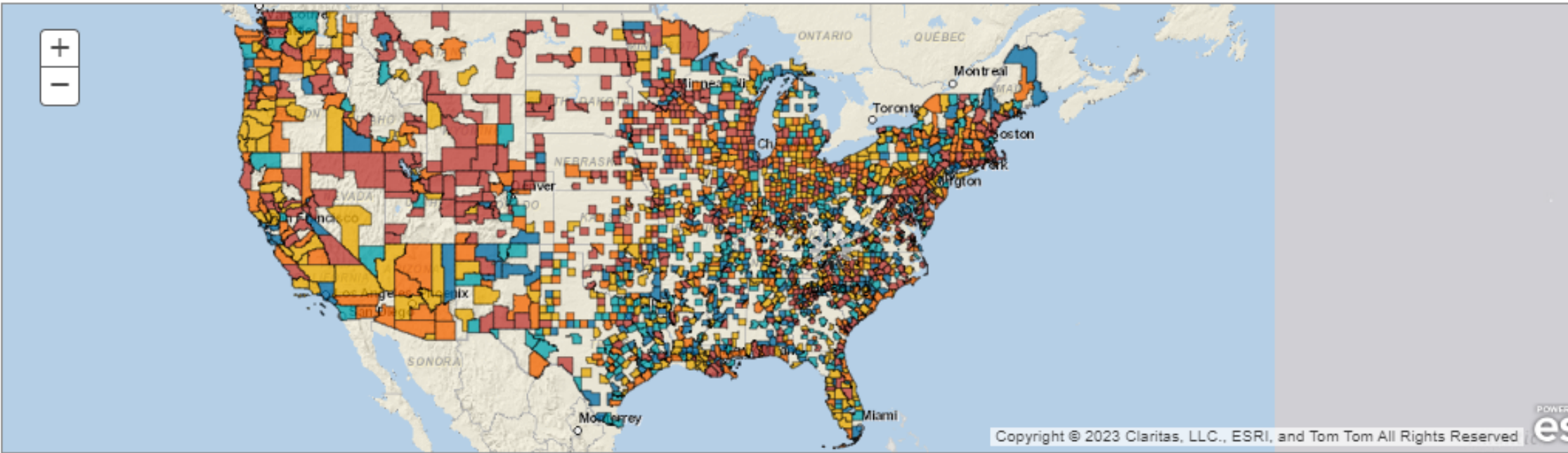
US Households: 1,316,869
Median Household Income: \$125,506

Demographic Traits

- Urbanicity : Town
- Income : Upscale
- Income Producing Assets : Elite
- Household Technology : 2 Above Average
- Age Ranges : Age 35-54
- Presence of Kids : Mostly w/ Kids
- Homeownership : Mostly Owners
- Employment Levels : Management and Professional
- Education Levels : Graduate Plus

Lifestyle & Media Traits

- Owns a Nissan
- Eats at Mellow Mushroom
- Shops at Finish Line
- Follows college sports on Instagram and Twitter
- Stays at the Holiday Inn
- Watches NCAA Basketball tournament
- Listens to Sports Radio



Top 5 Counties	
Name	Index
Summit County	1847
Matanuska-Susitna Borough	1234
Hood River County	1173
Sitka City and Borough	1150
Brookings County	1127

Legend			
	%Comp	%Pen	Index
Quintile 1	56.28	3.35	285
Quintile 2	25.00	1.47	125
Quintile 3	12.75	0.74	63
Quintile 4	5.01	0.30	26
Quintile 5	0.96	0.06	5



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

How to Communicate

- [Don't]
- Needs a lot of educational awareness.
- Not ready to progress
- Use soft skills / soft manners. Soft persuasion in a friendly manner.
- Needs to be convinced
- Doesn't like to feel pressured.
- Make him feel it was his idea.

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

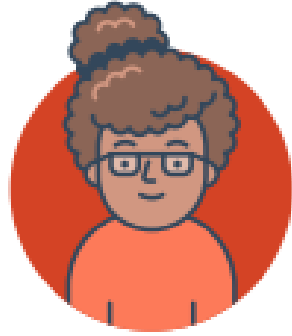
CANADA



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 confused why she is getting them. Probably unsubscribed which also unsubscribed her from Ortho as well.
ORTHO PACKS	Not sure if the launch campaign will reach her.
NOTES	Considers having different segmentations for Canada to increase reach. Similar to Debbie. Only consumes what she needs. Expects localized content/ personalized messaging. Ortho can only sell to NDs and Pharmacists. Canada gov recommends using 24 hr. clock. First Name: Surname Last Name: Given Name



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

How to Communicate

- Prefers scientific backup.
- Prefers direct communication that will have a greater impact on her business and her community.
- Doesn't like cold sales.



Field type

Dropdown select

NAME		INTERNAL VALUE	CONTACTS WITH VALUE
	 Debbie	persona_1	0
	 Adele	persona_2	0
	 Jennifer	persona_3	0
	 James	persona_4	0
	 Charlotte	persona_5	0

TARGET AUDIENCE



NAME	Anthony
CULTURAL FIT	Willing to learn Health Oriented Indispensable
PSYCHOGRAPHICS	Creative Determined Takes Initiative Responsible Optimistic
DEMOGRAPHICS	local for IL WI Regional for Sales 22 - 55 yrs. old
BEHAVIOR	Exercises Growth Mindset Competitive
SKILLS	Communications Results Oriented Attention to Details Multitasker tech Savvy

LinkedIn Targeting Capabilitites



EXPERIENCE	REMARKETING	EDUCATION	MEDICAL FIELD	LOCATION	DEMOGRAPHICS	COMPANY	Industry	Interests	Programs
JOB FUNCTION	CRM LIST	SCHOOL	CARDIOLOGISTS	COUNTRY	GENDER	COMPANY	Health Wellness	The Institute for Functional Medicine (medical education)	Cardiometabolic
TITLE	SITE REMARKETING	DEGREE	IMMUNOLOGIST	STATE	AGE	CATEGORY	Hospitals Healthcare	Healthcare	Immune
SENIORITY		FIELD OF STUDY	CHIROPRACTOR ORTHOPEDISTS	CITY	INTERESTS	CONNECTIONS	Medical Practice	Supplements	Musculoskeletal (MSK)
SKILLS			GASTROENTEROLOGIST		TRAITS	FOLLOWERS OF	Pharmaceuticals	Institute for Integrative Nutrition	Gastro Intestinal (GI)
YEARS OF EXPERIENCE			ENDOCRINOLOGIST			GROWTH RATE	Mental Health Care	Vitamins	Stress Recovery (SOS)
			GENERAL DOCTOR			INDUSTRY	Biotechnology	Health & Wellness	HEALTH RESILIENCY (WELLMATRIX)

LinkedInTarget 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)

Facebook | Instagram Target Segmentation - Ads



MEDICAL EDUCATION



Business and Industry



Interests



Demographics



Location

**HOLISTIC HEALTH
PRACTITIONER**

health care

holistic nutrition

Attends or Interested in
Institute for Integrative Nutrition

US

**THE INSTITUTE FOR
FUNCTIONAL MEDICINE**

health & medical

holistic health

Attends or interested in
*Southwest College of
Naturopathic Medicine*

**THE INSTITUTE FOR
FUNCTIONAL MEDICINE**

health and wellness

Attends or Interested in
*National College of Natural
Medicine*

**THE INSTITUTE FOR
FUNCTIONAL MEDICINE**

health

**CHIROPRACTOR |
ORTHOPEDISTS**

vitamins

GASTROENETORLOGIST

women's health

ENDOCRINOLOGIST

naturopath

NP

CARDIOLOGISTS

Estimated Daily Budget: \$50/day

Estimated audience size:

228,200,000 - 268,500,000

Estimated daily results:

Reach: 2.2K - 6.4K

Leads: 58-168

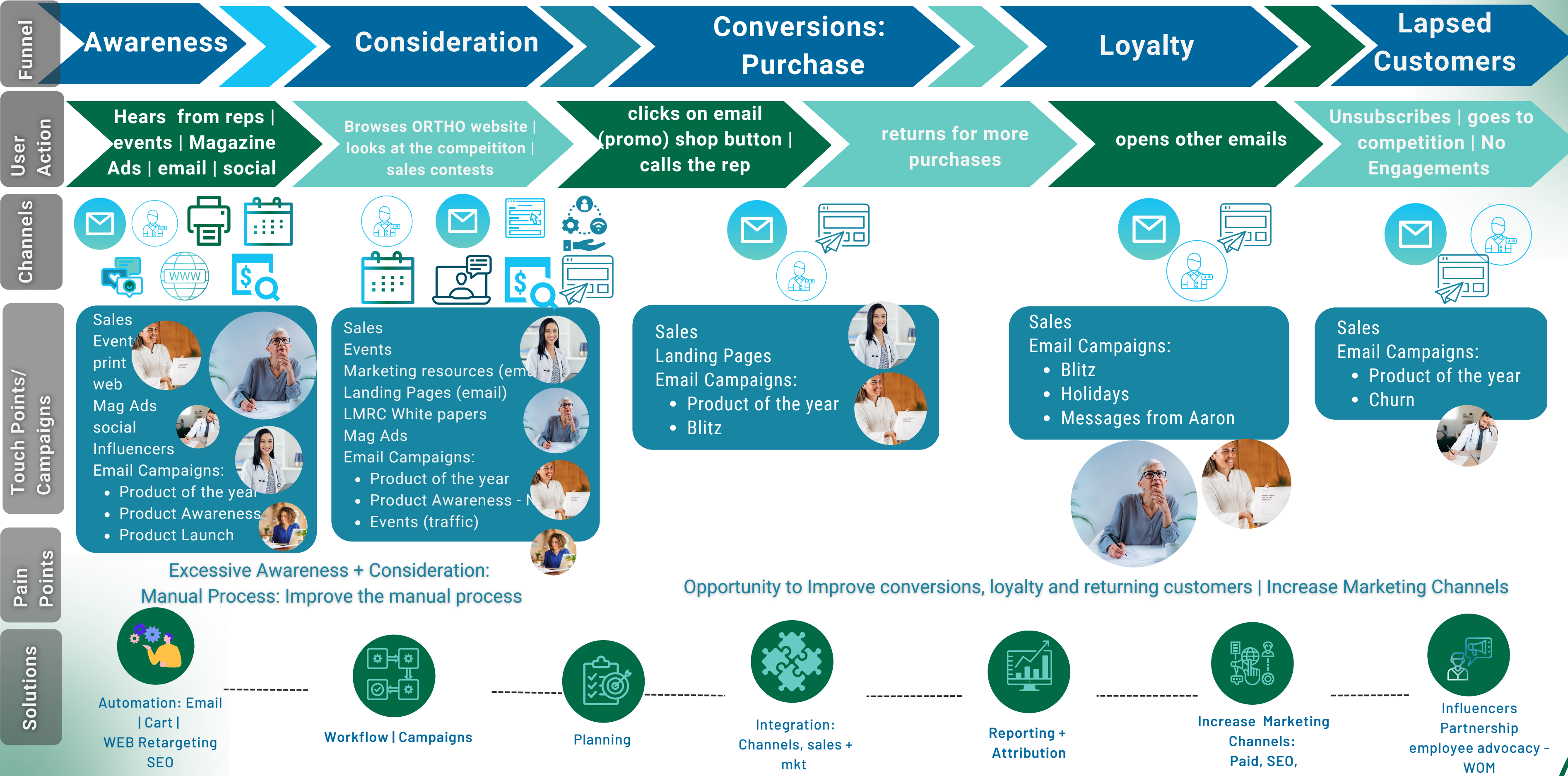


Customer Journey



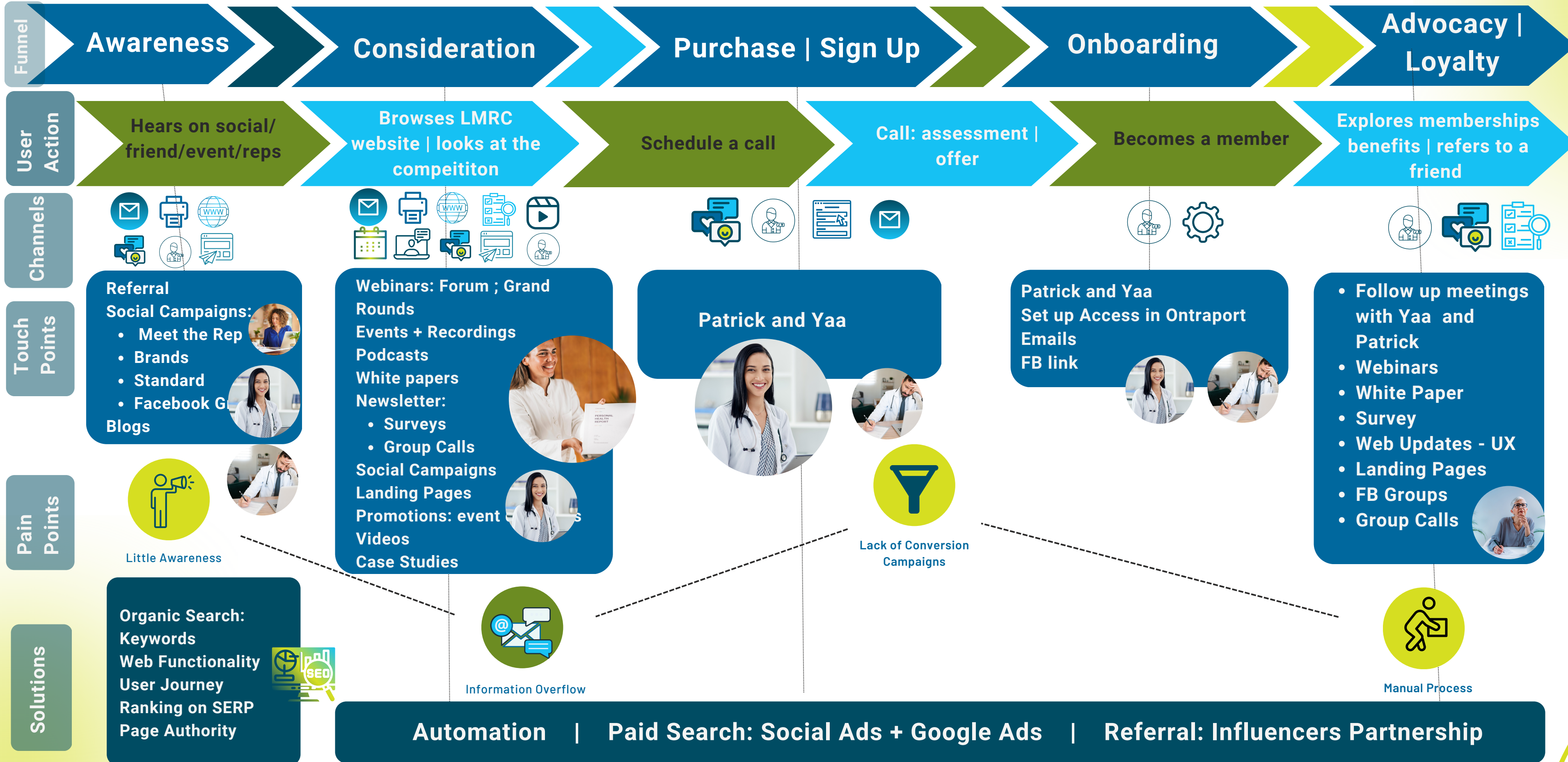
ORTHO CUSTOMER'S JOURNEY + EMAIL ACTIVITY

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



LMRC CUSTOMER'S JOURNEY

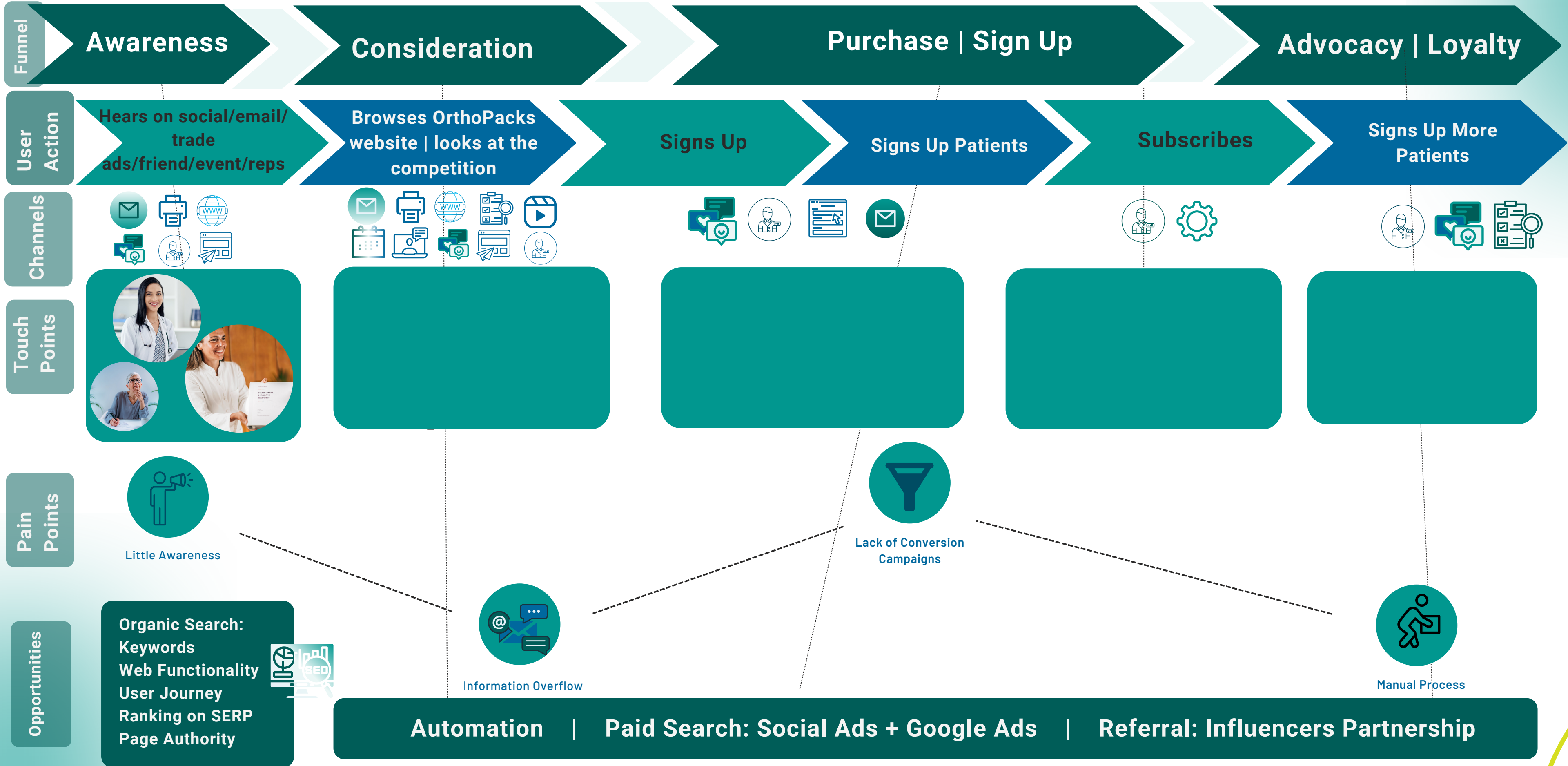
Marketing Funnel | Channels | User Action | Touch Points | Pain Points | Solutions





ORTHOPACKS

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





HubSpot Qualification



Lead Qualification Matrix

	Hand Raiser	Sales - Ready	Unready
Good Fit	Adele	Jennifer	Jennifer
Poor Fit	Debbie	James	Charlotte

A large teal shape on the left side of the slide, including a semi-circle and a smaller circle below it.

Maslow's Hierarchy of Needs

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.

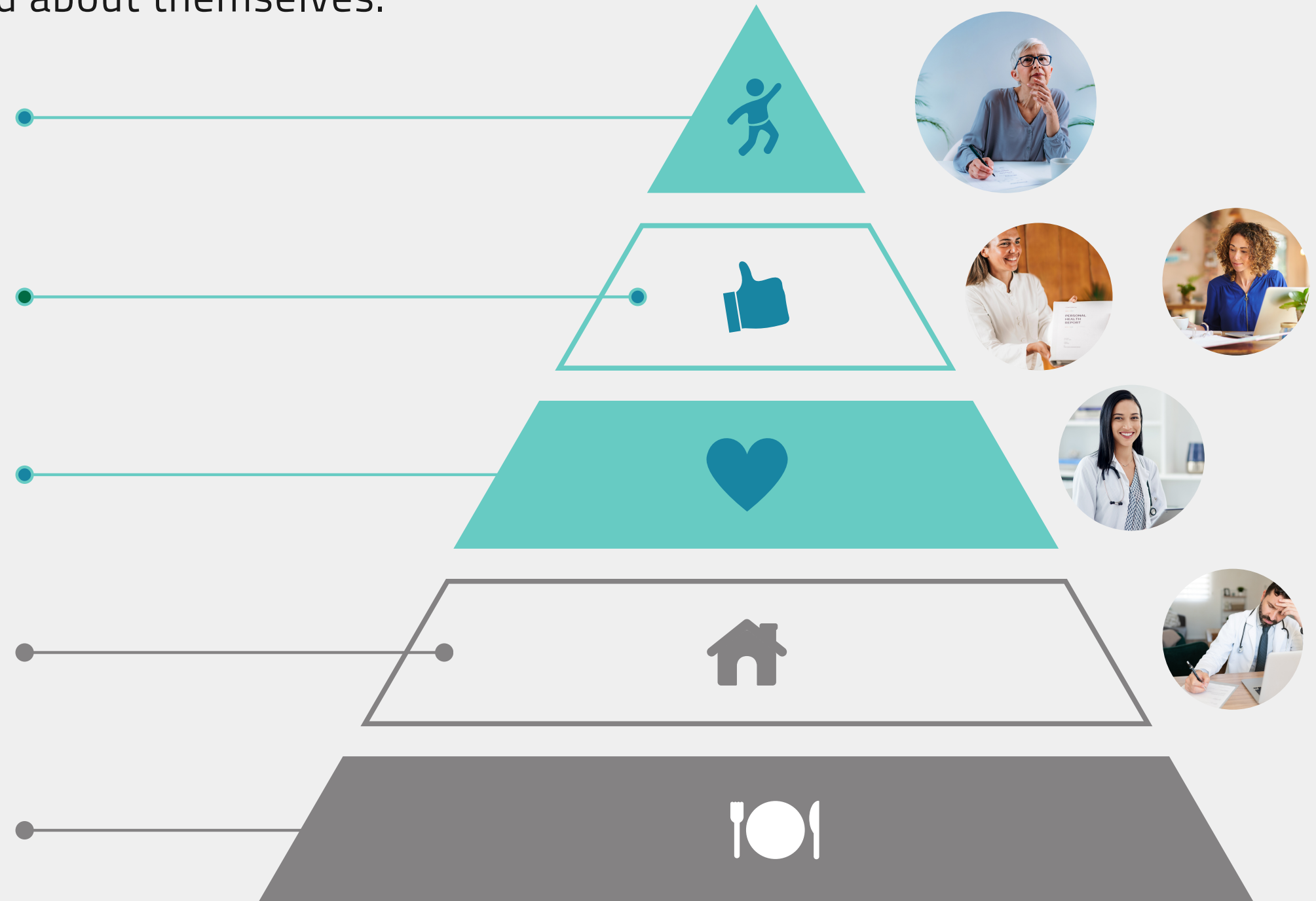
① Self-Actualization

② Esteem

③ Love and Belongingness

④ Safety: James needs to overcome the level of security and resources before he can psychologically advance to the next hierarchy level of Love and Belongingness

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

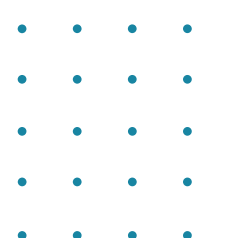
James needs the most guidance and support but is not ready for a change.

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



LMRC

- Practice Assessment- will adjust the questions based on personas (working with Yaa)
- Transferring Personas to HubSpot
- Creating properties and workflows in HubSpot (Yaa, Nicole, Ana, David)

OMPI

- Reps training on qualifying segments
 - Dynamics notes/HubSpot - talk to Anna to see if we have the mapping on Notes - map the additional properties
 - Start including target segmentation into LMRC - Friday communications (email)

HubSpot



- Add Personas to HubSpot (use properties)



- Data Cleaning

Insyncle Data Management



Two

For databases with up to 500,000 records (Contacts + Companies + Deals)

7 DAY FREE TRIAL

\$6 /mo

\$1.50 per 1,000 records

Monthly



Yearly

- ✓ Pick Two Modules: Merge Duplicates / Transform Data / Magical Import / Bulk Operations / Cleanse Data / Group & Update / Grid Edit / Data Validation
- ✓ Always Included: Health Assessment / Data Analysis / Alerts and Notifications / Data Collaboration / Data Exports / Activity Tracker / Automation
- ✓ Unlimited: Users, Usages, Operations

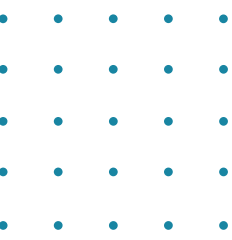


HubSpot



● Data Cleaning

- Bulk deduplicate contacts, companies, deals.
- Format people and company names, phone numbers, and addresses consistently.
- Standardize job titles, industries, and other free-text fields to improve segmentation and reporting.
- Monitor and detect data quality issues automatically with the Data Health Assessment
- Automate the process of cleaning HubSpot data using schedules and workflows integration.



The background features abstract teal 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 large teal shape curves from the bottom right towards the center, with a solid teal circle positioned above it. The text is centered between these two shapes.

THANK
YOU