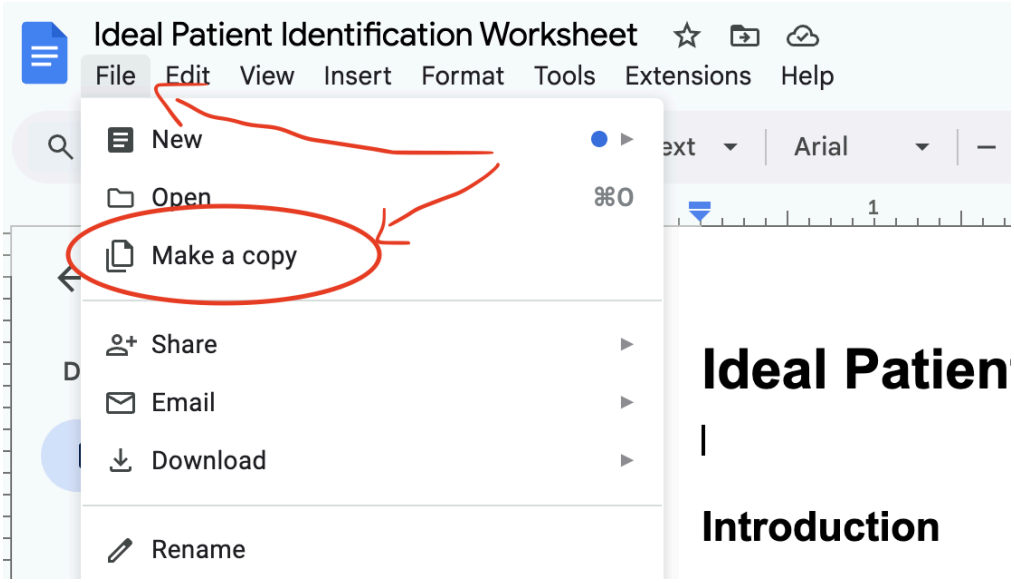
Ideal Patient Persona Worksheet

https://growth.healthcaremarketingvitals.com

Step 1: Make a copy of this sheet to use it



Instructions

This worksheet will help your healthcare practice identify and define your Ideal Patient Profiles (IPPs). Having clearly defined IPPs allows you to focus your marketing efforts, improve patient acquisition efficiency, and ultimately provide better care to the patients who benefit most from your specific services.

Section 1: Core Practice Analysis

A. Practice Strengths Assessment

List your practice's top 5 clinical strengths or service areas where you excel:

1. _____
2. _____
3. _____
4. _____
5. _____

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B. Practice Values & Philosophy

Describe your practice's core values and care philosophy in 2-3 sentences:

_____

_____

_____

C. Financial Model Analysis

Check all that apply to your practice:

- [ ] Insurance-based (primarily)
- [ ] Cash-based (primarily)
- [ ] Hybrid model
- [ ] Membership/concierge model
- [ ] Sliding scale available
- [ ] Payment plans offered
- [ ] Other: _____

List your top 3 most profitable services/procedures:

1. _____
2. _____
3. _____

Section 2: Current Patient Analysis

A. Top Patient Demographics

Analyze your current patient base and identify patterns among your most satisfied and profitable patients. Use patient surveys, reviews (on Google, Healthgrades, etc.) to find patterns:

Age Ranges (check all significant segments):

- [ ] Pediatric (0-17)
- [ ] Young Adult (18-29)
- [ ] Adult (30-44)
- [ ] Middle Age (45-64)
- [ ] Senior (65+)

Gender Distribution (approximate percentages):

- ____% Female
- ____% Male

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- ____% Non-binary/Other

Geographic Distribution (list top 3-5 zip codes):

1. _____
2. _____
3. _____
4. _____
5. _____

Average Travel Time to Practice (est.):

- [ ] Under 15 minutes
- [ ] 15-30 minutes
- [ ] 30-45 minutes
- [ ] Over 45 minutes

B. Insurance Analysis

List your top 5 insurance plans by patient volume:

1. _____
2. _____
3. _____
4. _____
5. _____

C. Referral Source Analysis

List your top 3 referral sources:

1. _____
2. _____
3. _____

Section 3: Patient Relationship Patterns

A. Retention Markers

What characteristics do your long-term patients share? Check all that apply:

- [ ] Regularly keep appointments
- [ ] Comply with treatment recommendations
- [ ] Communicate proactively
- [ ] Pay promptly

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- [ ] Refer others to the practice
- [ ] Engage with practice communications
- [ ] Other 1: _____
- [ ] Other 2: _____
- [ ] Other 3: _____

B. High-Value Patient Markers

What characteristics define your most profitable patients? Check all that apply:

- [ ] Utilize multiple services
- [ ] Participate in elective/cash procedures
- [ ] Have insurance plans with good reimbursement
- [ ] Require specific treatments where you excel
- [ ] Make prompt payments
- [ ] Schedule preventive care regularly
- [ ] Other 1: _____
- [ ] Other 2: _____
- [ ] Other 3: _____

C. Patient Satisfaction Indicators

Based on reviews, surveys, and feedback, what do your most satisfied patients value most? Look for common keywords, phrases, or sentiments. Rank top 3:

1. _____
2. _____
3. _____

Section 4: Ideal Patient Persona Development

Based on your analysis above, develop 3-5 distinct patient personas that represent your ideal patient segments. Make up these details so they correspond. You will "talk to" these people in various aspects of your advertising and marketing.

Persona 1

Persona Name: _____

Demographics:

- Age range: _____
- Gender: _____
- Location: _____

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- Income level: _____
- Education level: _____
- Occupation type: _____
- Family status: _____

Clinical Needs:

- Primary conditions: _____
- Secondary conditions: _____
- Preventive care needs: _____
- Treatment preferences: _____

Behavioral Traits:

- Technology adoption: _____
- Communication preferences: _____
- Decision-making style: _____
- Compliance level: _____

Financial Profile:

- Insurance type: _____
- Payment behavior: _____
- Price sensitivity: _____

Psychographic Elements:

- Key values: _____
- Healthcare priorities: _____
- Lifestyle factors: _____
- Pain points/challenges: _____

Marketing Channels to Reach This Persona:

- Digital channels: _____
- Traditional channels: _____
- Referral sources: _____

Sample Marketing Message for This Persona:

_____

_____

_____

Persona 2

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Persona Name: _____

Demographics:

- Age range: _____
- Gender: _____
- Location: _____
- Income level: _____
- Education level: _____
- Occupation type: _____
- Family status: _____

Clinical Needs:

- Primary conditions: _____
- Secondary conditions: _____
- Preventive care needs: _____
- Treatment preferences: _____

Behavioral Traits:

- Technology adoption: _____
- Communication preferences: _____
- Decision-making style: _____
- Compliance level: _____

Financial Profile:

- Insurance type: _____
- Payment behavior: _____
- Price sensitivity: _____

Psychographic Elements:

- Key values: _____
- Healthcare priorities: _____
- Lifestyle factors: _____
- Pain points/challenges: _____

Marketing Channels to Reach This Persona:

- Digital channels: _____
- Traditional channels: _____
- Referral sources: _____

Sample Marketing Message for This Persona:

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Persona 3

Persona Name: _____

Demographics:

- Age range: _____
- Gender: _____
- Location: _____
- Income level: _____
- Education level: _____
- Occupation type: _____
- Family status: _____

Clinical Needs:

- Primary conditions: _____
- Secondary conditions: _____
- Preventive care needs: _____
- Treatment preferences: _____

Behavioral Traits:

- Technology adoption: _____
- Communication preferences: _____
- Decision-making style: _____
- Compliance level: _____

Financial Profile:

- Insurance type: _____
- Payment behavior: _____
- Price sensitivity: _____

Psychographic Elements:

- Key values: _____
- Healthcare priorities: _____
- Lifestyle factors: _____
- Pain points/challenges: _____

Marketing Channels to Reach This Persona:

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- Digital channels: _____
- Traditional channels: _____
- Referral sources: _____

Sample Marketing Message for This Persona:

_____

_____

_____

Section 5: Implementation Plan

A. Marketing Channel Prioritization

Based on your ideal patient personas, which marketing channels will you prioritize? Rank in order of importance:

1. _____
2. _____
3. _____
4. _____
5. _____

B. Message Development

List 3-5 key messages that will resonate with your ideal patient personas:

1. _____
2. _____
3. _____
4. _____
5. _____

C. Tracking Metrics

Which metrics will you track to measure the success of your targeting efforts? Check all that apply:

- [ ] Patient acquisition cost by channel
- [ ] Patient lifetime value by persona
- [ ] Retention rate by persona
- [ ] Treatment plan acceptance rate
- [ ] Patient satisfaction scores
- [ ] Referral rates from targeted personas

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- [ ] Marketing ROI by channel and persona
- [ ] Other: _____

D. Timeline for Implementation

Outline what you will do and when to implement your messaging changes:

First 30 Days:

60-90 Days:

90-180 Days:

Next Steps

After completing this worksheet:

1. Share the results with your leadership team and key stakeholders
2. Integrate your targeting strategy into your marketing plan
3. Develop specific campaigns for each persona
4. Establish baseline metrics and tracking mechanisms
5. Revisit and refine your personas quarterly

Remember, effective patient targeting is an ongoing process that should evolve with your practice and market conditions.

If You Want Help

Looking for someone with the expertise and experience to fill your appointment schedule?

Book a Call

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