

# Digital Marketing Platform Evaluation Questionnaire for *Elective Practices*

## How to Use This Buyer's Guide

This buyer's guide is designed to help you systematically evaluate digital marketing platforms for practices like yours. Fill out each section during vendor demos and consultations to make an objective comparison and identify the best partner for your practice's unique needs and growth goals.

### SECTION 1 Current Practice Assessment

#### Your Practice Profile

Practice Name \_\_\_\_\_

Monthly Revenue \_\_\_\_\_

Number of Locations \_\_\_\_\_

Current Marketing Budget \_\_\_\_\_

Primary Services \_\_\_\_\_

Biggest Growth Goal \_\_\_\_\_

#### Current Challenges (*Check all that apply*)

- |  |  |
|--|--|
| <input type="checkbox"/> Outdated or unprofessional website        | <input type="checkbox"/> Leads aren't converting to appointments   |
| <input type="checkbox"/> Not showing up on Google search results   | <input type="checkbox"/> High staff turnover affecting follow-up   |
| <input type="checkbox"/> Getting traffic but poor conversion rates | <input type="checkbox"/> Manual lead tracking processes            |
| <input type="checkbox"/> Lack of website performance insights      | <input type="checkbox"/> Staff too busy for consistent follow-up   |
| <input type="checkbox"/> Poor mobile user experience               | <input type="checkbox"/> No visibility into patient communications |
| <input type="checkbox"/> Inconsistent ROI from advertising         | <input type="checkbox"/> Difficulty standing out from competitors  |
| <input type="checkbox"/> Leads are too expensive or low quality    | <input type="checkbox"/> Lack of in-house marketing expertise      |
| <input type="checkbox"/> Don't know which marketing channels work  | <input type="checkbox"/> Unreliable current marketing results      |
| <input type="checkbox"/> Seasonal revenue fluctuations             | <input type="checkbox"/> Concerned about rebranding success        |
| <input type="checkbox"/> Difficult to compete in local market      | <input type="checkbox"/> Bad experience with previous agencies     |

## Company Background & Industry Specialization

Vendor Name \_\_\_\_\_

1 How long have you specialized in marketing for practices like ours?

Answer \_\_\_\_\_

2 How many aesthetic and wellness practices do you currently serve?

Answer \_\_\_\_\_

3 What's your client retention rate for practices like ours?

Answer \_\_\_\_\_

4 Are you a specialized agency or do you work across multiple industries?

Answer \_\_\_\_\_

5 Do you offer all marketing services in-house, or will we need to work with multiple vendors?

Answer \_\_\_\_\_

## Integration & Marketing Ecosystem

1 What integrations do you offer to connect our existing systems? EMR/EHR Systems:

☐ ModMed

☐ Aesthetic Record

☐ Nextech

☐ TouchMD

☐ Zenoti

☐ Other

☐ Mindbody

2 If you don't provide certain services (website, SEO, paid ads, CRM), what vendors do you recommend we work with for the missing pieces?

Answer \_\_\_\_\_

- 3 Who will be responsible for coordinating between multiple vendors to ensure our marketing efforts are aligned?

Answer \_\_\_\_\_

## Website Development & Optimization

- 1 Do you build custom websites specifically for practices like ours, or do you use generic templates?

Answer \_\_\_\_\_

- 2 What's your approach to website conversion optimization for aesthetic practices?

Answer \_\_\_\_\_

- 3 What's included in ongoing website maintenance and updates?

- |  |   |
|--|---|
| <input type="checkbox"/> Speed optimization and performance monitoring | <input type="checkbox"/> Security and backup management |
| <input type="checkbox"/> Mobile responsiveness updates                 | <input type="checkbox"/> ADA compliance monitoring      |
| <input type="checkbox"/> Content updates and edits                     | <input type="checkbox"/> Unlimited edits and revisions  |

- 4 How do you ensure our website loads quickly and ranks well on search engines?

Answer \_\_\_\_\_

## Search Engine Optimization

- 1 Do you specialize in SEO specifically for practices like ours?

Answer \_\_\_\_\_

- 2 What SEO services are included in your packages?

- |   |  |
|---|--|
| <input type="checkbox"/> Technical SEO audit and ongoing fixes              | <input type="checkbox"/> Content creation (blogs, service pages) |
| <input type="checkbox"/> On-page optimization for aesthetic keywords        | <input type="checkbox"/> Local citation building and management  |
| <input type="checkbox"/> Local SEO and Google Business Profile optimization | <input type="checkbox"/> Monthly SEO performance reporting       |

- 3 How do you approach local SEO for practices competing in saturated markets?

Answer \_\_\_\_\_

4 What's your typical timeline for SEO results for practices like ours?

Answer \_\_\_\_\_

5 How do you measure and report SEO success?

Answer \_\_\_\_\_

## Paid Media Management

1 What advertising platforms do you manage for practices like ours?

☐ Google Ads (Search, Display, YouTube)

☐ Meta (Facebook & Instagram)

☐ Other Platforms:

2 What are your typical cost-per-lead ranges for practices like ours?

Answer \_\_\_\_\_

3 How do you ensure lead quality over lead volume?

Answer \_\_\_\_\_

4 Do you create all ad creatives in-house, or do we need to provide content?

Answer \_\_\_\_\_

5 How do you prevent ad fatigue and maintain performance?

Answer \_\_\_\_\_

6 What's your approach to audience targeting for practices like ours?

Answer \_\_\_\_\_

## Marketing Automation & CRM

1 Is your CRM built specifically for aesthetic practices or adapted from a generic system?

Answer \_\_\_\_\_

2 What key automation features are included?

- |  |   |
|--|---|
| <input type="checkbox"/> Lead nurturing sequences  | <input type="checkbox"/> Patient reactivation campaigns |
| <input type="checkbox"/> Missed call text-back     | <input type="checkbox"/> Appointment reminders          |
| <input type="checkbox"/> Review request automation |   |

## Pricing & Value Structure

1 What is your monthly platform fee?

Answer \_\_\_\_\_

2 What setup/onboarding fees are required?

Answer \_\_\_\_\_

3 What are minimum advertising spend requirements?

Answer \_\_\_\_\_

4 Are there usage limits or additional fees we should expect?

Answer \_\_\_\_\_

## Performance & Results Accountability

1 What conversion rates do your marketing funnels typically achieve for practices like ours (leads to consultations)?

Answer \_\_\_\_\_

2 How do you measure and guarantee ROI for practices like ours?

Answer \_\_\_\_\_

3 Can you show specific before/after case studies for practices like ours?

Case Studies Quality (Rate 1-10) \_\_\_\_\_

## Growth99 Platform Offerings Comparison

Use this framework to compare how each vendor addresses the needs of practices like yours:

### ✦✦ Essential Package Level (Baseline Requirements)

Feature	Vendor A	Vendor B	Growth99 Essentials
Aesthetic-Specific CRM	<input type="checkbox"/>	<input type="checkbox"/>	✓ Built for practices like yours
Patient Communications	<input type="checkbox"/>	<input type="checkbox"/>	✓ Email & SMS automation
Self-Assessment Tool	<input type="checkbox"/>	<input type="checkbox"/>	✓ Custom consultation tools
AI Chatbot	<input type="checkbox"/>	<input type="checkbox"/>	✓ 24/7 lead capture
Form Builder	<input type="checkbox"/>	<input type="checkbox"/>	✓ Conversion-optimized forms
Basic Reporting	<input type="checkbox"/>	<input type="checkbox"/>	✓ Real-time performance dashboard

### ✦✦ Accelerator Package Level (Growth-Focused)

Feature	Vendor A	Vendor B	Growth99 Accelerator
All Essential Features PLUS	<input type="checkbox"/>	<input type="checkbox"/>	✓ Everything included in Essentials
Custom Website Design	<input type="checkbox"/>	<input type="checkbox"/>	✓ Built for aesthetic practices
Website Performance Optimization	<input type="checkbox"/>	<input type="checkbox"/>	✓ Speed, mobile, conversion focus
Professional Content Creation	<input type="checkbox"/>	<input type="checkbox"/>	✓ Service pages, copy optimization
Google Business Profile Optimization	<input type="checkbox"/>	<input type="checkbox"/>	✓ Local search dominance
Reviews Management System	<input type="checkbox"/>	<input type="checkbox"/>	✓ 5-star review generation
Basic SEO Services	<input type="checkbox"/>	<input type="checkbox"/>	✓ Technical and on-page optimization
Paid Media Management	<input type="checkbox"/>	<input type="checkbox"/>	✓ Google & Meta campaigns
Social Media Graphic Creation	<input type="checkbox"/>	<input type="checkbox"/>	✓ Professional content creation

## ✦ Elite Package Level (Comprehensive Marketing)

Feature	Vendor A	Vendor B	Growth99 Elite
<b>All Accelerator Features PLUS</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Everything included in Accelerator
<b>Advanced SEO Strategy</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Technical, local, content SEO
<b>Monthly Content Marketing</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Expert blog writing
<b>Comprehensive Analytics</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Quarterly strategy reviews
<b>Pre- &amp; Post-Launch SEO</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Complete optimization process
<b>Local Citation Management</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Monthly directory optimization
<b>Advanced Paid Media</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Multiple campaigns, custom video
<b>Multi-Location Services</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Scalable growth solutions
<b>Dedicated Account Management</b>	<input type="checkbox"/>	<input type="checkbox"/>	✓ Strategic partnership approach

## SECTION 4 The Hidden Costs of Multi-Vendor Marketing

### The Reality Check: Complete Marketing Coverage for Practices Like Yours

Most vendors you evaluate will NOT offer the complete range of services needed for comprehensive marketing. This means you'll likely need to hire multiple specialists:

#### Typical Vendor Breakdown:

<b>Website Developer</b>	\$2,000-5,000 setup + \$200-500/month maintenance
<b>SEO Specialist</b>	\$1,000-3,000/month for practices like yours
<b>Paid Media Agency</b>	\$1,500-3,500/month management + ad spend
<b>CRM Platform</b>	\$200-800/month + setup fees
<b>Social Media Manager</b>	\$500-1,500/month
<b>Content Creator</b>	\$800-2,000/month
<b>Total Multi-Vendor Cost</b>	<b>\$4,000-10,800/month (not including ad spend)</b>

## Critical Questions About Multi-Vendor Coordination

### Who's the Project Manager?

- 1 When your website isn't converting paid traffic, who identifies if it's a website problem, ad targeting issue, or landing page mismatch?

Answer \_\_\_\_\_

- 2 Who ensures your SEO strategy doesn't conflict with your paid search campaigns?

Answer \_\_\_\_\_

- 3 When leads aren't converting, who determines if it's a CRM automation issue or campaign quality problem?

Answer \_\_\_\_\_

### Accountability Questions

- 1 If results decline, how do you determine which vendor is responsible?

Answer \_\_\_\_\_

- 2 What happens when the SEO team blames the website developer, and the paid media team blames both?

Answer \_\_\_\_\_

- 3 Who takes ownership of your overall marketing ROI?

Answer \_\_\_\_\_

### Communication Overhead

- 1 How many monthly meetings will you need with different vendors?

Answer \_\_\_\_\_

- 2 Who ensures all vendors understand your practice's unique positioning and messaging?

Answer \_\_\_\_\_



Answer 

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**SECTION 5** The Hidden Costs of Multi-Vendor Marketing

## Warning Signs of Volume-Focused Agencies

When evaluating vendors, be cautious of agencies that prioritize quantity over quality for practices like yours:

**Red Flags to Watch For:**

Work across dozens of different industries (not specialized)



Promise unrealistic lead volumes or patient guarantees



Focus on vanity metrics (clicks, impressions) rather than conversions



Use generic marketing approaches not tailored to aesthetic practices



Offer significantly lower prices than specialized competitors



Cannot provide specific case studies for practices like yours



Have high client turnover or poor online reviews



Use templates and cookie-cutter solutions



Lack understanding of aesthetic practice patient journey



Cannot integrate with your existing practice management systems

## Questions That Expose Volume-Based Approaches

- "What percentage of your clients are aesthetic, wellness, or healthcare practices?"
- "How do you customize your approach specifically for our industry?"
- "What's your average client retention rate and why do practices leave?"
- "How do you ensure lead quality versus just lead volume?"

**SECTION 6** Making Your DecisionTop Choice 

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Why this vendor is the best fit for practices like yours?

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## Key Differentiators

Industry Specialization

Website & SEO Expertise

Paid Media Results

Integration Capabilities

Quality vs. Volume Focus

## Implementation Checklist

- ☐ Contract terms negotiated
- ☐ Integration requirements confirmed
- ☐ Team training scheduled
- ☐ Go-live timeline established
- ☐ Performance benchmarks set

Decision Date