**Marketing Representative S.O.P.**

**Weekly Activities-**Each week, it is the responsibility of the Marketing Rep to visit multiple accounts and have 35-45 meaningful conversations with key personnel. This does not mean drive to 35-45 locations, but rather 10 locations and see 4 key personnel in each location for example.

**In Services –** It is the goal to have at least 1 In Service every week at a different location. These can be Lunch n Learns, Breakfast n Learns, segment of a weekly meeting, and so on. Topics should be a Campaign (Ex: Fall Prevention), highlights, VA Benefits, or something customized to fit the need of the referral source

**Networking Events-**There are always networking opportunities throughout the territory given. Goal is to attend 1 each week

**Community Events-**Any other type of event in the community such as an after-hours wine taste at a SNF, CEU event, or hosting Bingo at a top account. Partake in at least 1 each week.

**Monthly Marketing Plan –** Use the Monthly Marketing Plan document to fill out your schedule in advance and give to your Executive Director prior to the start of each month. It’s ok to have “Open” spaces that you have yet to fill, as the month hasn’t happened, but this will help to keep you as productive as possible. Plan your work, then work your plan.

**Personal Daily Interaction-** P.D.I. should happen once a day with E.D. This is a 10-15 minute call to go over the daily highlights and forecast for tomorrow. Call should be made from the rep between 4-5pm unless otherwise noted. If call isn’t received by 5, the E.D. will call between 5-530. The E.D. should never have to call the Rep unless it’s a call back.

**Weekly Reports-**Should include all of the above for the week and is due to the E.D. by Saturday morning of the week reporting on. Use the Excel spread sheet for details of activities. Send attached to email. For the email body:

* Bullet point the highlights
* Give the number of Meaningful Conversations
* List any clients/referrals gained
* Forecast events planned for upcoming week

**Field Day with E.D. –** Make sure the day is planned with events, meetings, in services, and a few cold visits. A Field Day should never be empty as this would waste the time with your E.D.

**Weekly Meetings-**Discuss your weekly report during the meeting. Talk about the highlights mentioned in the email to E.D., discuss the Pipeline and which locations in your territory are “Full”, go over what step in development your accounts are in (From “How to Successfully Develop a Referral Source”), review referrals given with the team, and briefly talk about the coming week. A meeting is never to be missed.