

High-Converting Aesthetic Clinic Marketing Plan & Budget Allocation Template

How to Use This Template: This tool is designed to help clinic managers transition from intuition-based decisions to a data-driven marketing system. Please replace the [placeholder data] with your clinic's actual financial figures and strategic goals.

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Module 1: Core Strategy & Audience Targeting

Complete this table with your team before spending a single dime on ads.

Strategic Dimension	Your Clinic's Information (Examples & Prompts)
Unique Value Proposition (UVP)	[e.g., The only anti-aging center in the city using Konmison's top-tier painless devices, with a 100% transparent pricing guarantee.]
Average Order Value (AOV)	[\$[Enter your average patient spend per visit, e.g., 800]]
Core Audience Persona A (Acquisition)	[e.g., 25-32 YO professionals. Pain point: early aging/dull skin. Key treatments: Skin boosters/IPL]
Core Audience Persona B (Profit)	[e.g., 40-55 YO high-net-worth women. Pain point: skin laxity. Key treatments: HIFU/Thermage + Fillers]
Top Competitor Analysis	[Competitor Name]: Their advantage is [XXX], our counter-strategy is [XXX].

Module 2: SMART Goals & KPI Dashboard

Break down grand annual goals into trackable, bite-sized monthly metrics.

Key Performance Indicators (KPIs)	Baseline (Current)	Target (Monthly/Quarterly)	Tracking Frequency	Owner
Total Monthly Marketing Budget	\$(e.g., 8,000)	\$(e.g., 10,000)	Monthly	Clinic Manager
Customer Acquisition Cost (CAC)	\$(e.g., 150/lead)	Reduce to \$(e.g., 90/lead)	Weekly	Marketing Specialist
Consultation Close Rate	[e.g., 30%]	Increase to [e.g., 50%]	Weekly	Front Desk/Coordinator
Google Organic Search Traffic	[e.g., 500 visits/mo]	Increase to [e.g., 800 visits/mo]	Monthly	SEO/Content Team
Annual Patient Retention Rate	[e.g., 35%]	Increase to [e.g., 60%]	Quarterly	CRM/Patient Relations

Module 3: The 40/50/10 Budget Allocation Calculator

Industry benchmarks suggest the following allocation to balance short-term acquisition and long-term profit. (Example assumes a \$10,000 monthly budget).

Marketing Funnel Stage	Budget %	Allocated Amount	Core Channels / Actions	Expected KPI Target

1. New Patient Acquisition	40%	\$4,000		Acquire high-intent first-time patients
- Google Search Ads	20%	\$2,000	Bid on long-tail local keywords (e.g., "dermal fillers in Boston").	Generate 20 high-intent consultations.
- Meta (FB/IG) Ads	15%	\$1,500	Promote limited-time first-visit offers (video ads).	Capture 50 new patient leads.
- Local SEO	5%	\$500	Google Business Profile updates & website content.	Maintain Top 3 in Local Map Pack.
2. Patient Retention	50%	\$5,000		Maximize LTV (Lifetime Value) and repeat visits
- CRM Email/SMS Automation	15%	\$1,500	Automated Botox reminders, birthday perks.	Reactivate 30 patients lost for 6+ months.
- VIP Membership Program	20%	\$2,000	Maintain subscription system, host private events.	Sell 10 annual premium anti-aging packages.
- Referral Program	15%	\$1,500	Reward patients for referrals (e.g., free basic facial).	Acquire 15 new patients via word-of-mouth.

3. Brand Building	10%	\$1,000		Establish medical authority and visual trust
- Visual & Content Production	10%	\$1,000	Shoot/edit high-quality treatment videos and doctor FAQs.	Output 3 TikTok/IG Reels per week.
Total	100%	\$10,000	<i>(Ensure spending stays within total budget limit)</i>	

Module 4: Patient Retention & CRM Automation Workflow

Do not rely on your front desk's memory. Standardize and automate your patient follow-up process.

Trigger Event	Channel	Message Template (Example)	Strategic Purpose
24 Hours Post-Treatment	Auto SMS	"Thank you for choosing [Clinic Name]. Click here for your aftercare instructions. Reach out anytime if you have questions!"	Provide reassurance and reduce post-op anxiety.
3 Days Post-Treatment	Auto SMS	"We hope you're loving your results! If you have 30 seconds, please leave us a Google review here: [Link]. It means the world to us!"	Systematically acquire 5-star Google reviews.
4 Months Post-Botox/Fillers	Auto Email	"Hi [Name], to maintain your smooth, youthful results, we recommend scheduling a quick	Periodic reactivation to secure the next booking.

		follow-up assessment in the next two weeks."	
1st Day of Birthday Month	SMS + Email	"Happy Birthday! Show this text this month to redeem a complimentary [Basic Treatment] or enjoy 15% off any premium package."	Elevate the VIP experience and stimulate high-ticket spending.