



Kara Ware: [\(00:00\)](#)

This is Good Medicine *On the Go*.

Nathan Morris: [\(00:10\)](#)

So Kara, social media is somewhat a mystery for me and honestly always has been, but I know that Tik Tok is super popular right now, so I thought about going on Tik Tok and starting to twerk to see what kind of traction I get with prospective patients.

Kara Ware: [\(00:24\)](#)

Okay. Okay. Go ahead and tell us more of the reason behind this.

Nathan Morris: [\(00:28\)](#)

Yeah, there he is kind of a rhyme or reason. I have this new practice and I was doing almost everything, not being specific, not doing the things we talked about in previous episodes. I was on Facebook ads and doing videos and newspaper ads, but really it did not amount diddly-squat. We had all our awesome systems and staff in place, thanks to you, I might add, but the stampede to our front door was just not happening. So, I am getting a little desperate because I hung up a shingle and said functional medicine and people just did not come running. Most people, even when I was meeting them and talking to them out in public, they didn't even know what functional medicine was, so I thought maybe to get the attention I needed for the practice working on Tik Tok would be the missing platform.

Kara Ware: [\(01:13\)](#)

Okay. Well, Tik Tok is a sensation, and it really is taking over at least with my kids, if that is who you are marketing to. I think this episode, Nathan, will definitely help you and our listeners understand that twerking on Tik Tok may not be the answer to bring in new patients, and especially for the demographic you're trying to reach

Nathan Morris: [\(01:35\)](#)

That's really a relief Kara, because twerking hurts my back anyway, and I suck at it.

Kara Ware: [\(01:43\)](#)

Hello and welcome to season three. I'm Kara Ware, a national board certified health coach and business advisor.

Nathan Morris: [\(01:54\)](#)

I'm Nathan Morris, a medical doctor who is also certified in functional medicine.

Kara Ware: [\(01:55\)](#)

All right, Nathan, let's quickly recap where we're at. In episode one and two this season, we talked about the first steps in creating your very own effective marketing campaign.

Nathan Morris: [\(02:06\)](#)



Yeah, Kara. So step one, identify your niche and step two, define your avatar.

Kara Ware: [\(02:12\)](#)

Right, and as we said, these are two different things.

Nathan Morris: [\(02:15\)](#)

Yeah. So, you may have specialized in a certain area of medicine, that is great, that is your niche. And the patient within that niche, that's your avatar.

Kara Ware: [\(02:23\)](#)

Right. For example, a niche might be perimenopause and then the avatar who lives in that niche is a woman between the ages of 45 and 55, high achieving, but exhausted and just feels off.

Nathan Morris: [\(02:37\)](#)

Yeah that's right, Kara.

Kara Ware: [\(02:38\)](#)

In episode three, we explained how to craft an ad specifically tailored to your avatar.

Nathan Morris: [\(02:44\)](#)

Right. An ad so specific that it gets your avatar to stop and say, "Hey, that's me," and the ad that breaks the inertia.

Kara Ware: [\(02:52\)](#)

Yeah. It gets them to stop scrolling through Facebook if you will, and interact with us.

Nathan Morris: [\(02:57\)](#)

Yeah. Okay. So where does that put us now, Kara?

Kara Ware: [\(02:59\)](#)

Right. Well, now that we have our niche, our avatar, and some best practices for writing our ads, now we need to figure out where exactly to put our ads.

Nathan Morris: [\(03:09\)](#)

But maybe not Tik Tok.

Kara Ware: [\(03:14\)](#)

Unless you want that younger generation.

Kara Ware: [\(03:16\)](#)

In today's episode, we're talking about choosing the right media for our ad. We are going to answer these questions, how to decide which media is right for you? What media is usually the best bang for



your buck? How to track the success of your ads once they are up and running? And how do you, a solo provider, pull all this off?"

Nathan Morris: [\(03:44\)](#)

Kara, the question is where do we put these ads that we've written? I would like to go back to another dating example since I seem to be so fond of these and gravitate to them. After I was separated from my starter wife 20 years ago, I had to decide where I would like to meet my keeper wife. I wanted someone who was healthy and adventurous. So, my choices; bars. That was a strong negatory. Biker rally, not so much. So, I went to a climbing gym, as this was the ideal location for healthy, adventurous women I was seeking. So my strategy was going to the place my ideal partner would frequent.

Kara Ware: [\(04:21\)](#)

So basically this was your market research. You identified the type of woman you wanted to meet and then located the most likely place to meet her. Really smart. I think I need to do that. I need to be thinking about this. This is the same with what we are doing with our marketing. And to help us bring all this back to just marketing is Whitney [Kolterman 00:04:40].

Kara Ware: [\(04:41\)](#)

Whitney Kolterman is the Marketing Director at the Kalish Institute. She has over 25 years of experience building and executing marketing strategies for companies like Martha Stewart Living, CamelBak and Salesforce. She also is a certified holistic health coach and is passionate about health and wellness education and broadening the awareness and adoption of functional medicine.

Nathan Morris: [\(05:05\)](#)

So she's really going to help us take these very broad marketing principles and apply them to functional medicine.

Kara Ware: [\(05:12\)](#)

Right, right. Let us jump into our interview. We started off by talking about choosing the best media to market to your avatar.

Kara Ware: [\(05:20\)](#)

How do you know what marketing or what social media platform is best for your avatar? Do you have any resources or insight of kind of narrowing down what social platform you're going to use so you don't feel like you have to be on all of them, right?

Whitney Kolterman: [\(05:36\)](#)

That's a really important and really great question. Yeah, there are a lot of resources to help stay up to date and find where your specific avatar and audience is going. Hootsuite's got several great blogs on it. There's HubSpot or Pew Research has some really good resources. My personal favorite is the Sprout Social blog, which you can find at [sproutsocial.com/insights](http://sproutsocial.com/insights). And the reason I like it so much is because you can filter by topic, by type, by industry and by your personal experience level. So if you're a



beginner, for example, you can just see the related articles and research for beginners, or on specific topics, or if you're super advanced, you can look at those too.

Whitney Kolterman: [\(06:27\)](#)

But they recently just came out with an article called ... was something like Social Media Demographics to inform your brand strategy. It had some really helpful information there where you can hone in on your specific area and your specific audience and figure out where they're doing their research and where they're going for information.

Kara Ware: [\(06:50\)](#)

So it sounds like they're really helping you with your market research?

Whitney Kolterman: [\(06:53\)](#)

They really are. I love it. I find I always learn something new when I go to their blog.

Nathan Morris: [\(07:03\)](#)

So Tik Tok is probably not my best platform. We have established that by reaching my [inaudible 00:07:07]. Should I not focus on social media, Kara?

Kara Ware: [\(07:13\)](#)

Well, I think social media is a perfect platform for what you're doing. And remember Whitney told us how to find the right social channel for your niche and avatar. That Sprout Social article Whitney recommended to find the right media for your avatar is titled Social Media Demographics to Inform Your Brand Strategy in 2021. You are going to find the link in our show notes. That's a great place to start and see whether the platform you're using are really dominating is the right fit for your avatar.

Kara Ware: [\(07:48\)](#)

We asked Whitney for her guidance on where we should focus our efforts to get the most bang of our advertising buck.

Whitney Kolterman: [\(07:55\)](#)

I think that when thinking about the best bang for your buck, social ads are really going to give you the best bang for your buck. Google tends to be competitive for certain keywords and specific geographies, where you can really tailor your audience on social. And it also takes some capacity to implement Google ads and to monitor them. Social is limited by platform users.

Whitney Kolterman: [\(08:18\)](#)

For example, Instagram tends to be younger, Facebook tends to be older, but well-placed and targeted social ads can have a lower cost per click than Google. So, it just depends on your geo-targeting your platform and your strategy. But the beauty of social ads is that you can really get specific about your audience and especially if you do not have a large budget to work with, you can set those limits on what you spend. We've had some really great success just with even \$50 or \$100 and some really small scale



advertising to reach just the right people that you want to be talking to.

Kara Ware: [\(08:56\)](#)

So best bang for your buck is really to start with some social ads. That kind of seems to be a little bit easier and more direct, and it seems like there's a lot of nuances with the Google ads to really understand and do that effectively.

Whitney Kolterman: [\(09:08\)](#)

It's true. Also, the other consideration is that it takes a lot of resources to manage the Google ads and ensure that they are performing properly and adjusting them and all that. So I would say from both a resourcing perspective and also from a sort of ease of use perspective that the social ads will give you the best bang for your buck.

Kara Ware: [\(09:32\)](#)

Especially with new to marketing, right, like Nathan and I are really new at strategically designing our marketing campaign; let's start with social ads first.

Whitney Kolterman: [\(09:40\)](#)

Definitely if you're new to marketing. And it will also give you a great starting point to start tracking how your ads are performing. And once you have that data to inform your campaigns, then you're going to really get to a good place of cadence of success.

Whitney Kolterman: [\(09:55\)](#)

It's just a matter of figuring out ... starting somewhere, right? Let us start small. Start with some social ads and start tracking them and monitor what is performing, what is working for you, what is not working for you. And once you are able to see that, then you're able to optimize all aspects of your campaign to improve their performance.

Nathan Morris: [\(10:20\)](#)

Whitney makes a great point. If you're new to marketing and trying this one ad, one objective approach, we need to be able to track the data we collect from ads.

Kara Ware: [\(10:30\)](#)

Yeah. Simply put, the role of marketing is to create leads and generate business opportunities. But how can we be sure we're spending the right amount of money on the right type of advertisements?

Nathan Morris: [\(10:39\)](#)

In order to make money, we need to spend money. That is how marketing works in business. But more than likely you do not have an unlimited marketing budget. So we will answer how does a small business owner invest their marketing dollars wisely right after this.

Kara Ware: [\(10:59\)](#)



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Nathan Morris: ([11:39](#))

So once we understand where our avatar is seeing social ads, we need to figure out how to track their engagement and interest. Again, this brings us back to the conversation that is happening in their heads. Did we do a good enough job by addressing their pains that they say yes and click to learn more?

Kara Ware: ([11:54](#))

Yeah. Whitney tells us it is important to track KPIs, those are key performance indicators, for each ad so we can understand if we are joining that conversation in their heads or talking to a proverbial brick wall. She tells us this is a good place to start these KPIs when first keeping track and analyzing the effectiveness of an ad.

Nathan Morris: ([12:15](#))

It's, Kara, honestly, totally out of my wheelhouse. Let's hear what Whitney had to say about this.

Kara Ware: ([12:21](#))

How do practitioners measure the success of their ads?

Whitney Kolterman: ([12:24](#))

Well, I think that starting by defining what your KPIs are, which is your key performance indicators, is a good place. There, is not a sort of catch-all for tracking the success of your marketing campaigns. You need to start with by identifying what defines that success for you? What is it that you are trying to achieve with your advertising? Whether it's driving people to a specific landing page, whether it's generating new leads and getting new email addresses in your list, whether it's you driving traffic to your website, it's important to start by just defining what those KPIs are and then setting benchmarks for measuring how your ads are performing toward achieving those goals.

Whitney Kolterman: ([13:12](#))

There's so many different metrics that you can use to measure the success of a campaign, but it's a matter of honing in on the metrics that are going to tell you whether your campaign is doing well or not.

Nathan Morris: ([13:27](#))

Kara, this is where it gets a little more complicated with taking our general term "key performance indicators" and making it practical. It was and is the area where I was completely out of my depth. I was more of a ready, fire, aim, kind of guy with my marketing as it related to emails and social media.

Kara Ware: ([13:44](#))



Yeah. This has been a big learning curve for both of us. Let's break it down so our listeners have some key takeaways.

Nathan Morris: ([13:51](#))

Yeah. This is important because I did not have these insights that we were going to be talking about. I was good at functional medicine but did not have the knowledge in this area or how to advertise on social media, but I did have the foresight to hire somebody to help me with this. But the people I hired were not doing the things that we are going to talk about. They were not tracking outcomes of social media and advertising because I did not know the language. And so I was really wasting my money and I was paying for a highly ineffective service.

Nathan Morris: ([14:21](#))

Let's outline some of the things that Whitney mentioned above, so if you do hire someone to help you, you will at least have the knowledge to make sure you're getting what you paid for.

Kara Ware: ([14:29](#))

Yeah. Good idea, Nathan. Let us begin with cost acquisition, which is basically how much did you have to spend to acquire a patient and was it worth it? To break that down even further, let us say you spent \$500 on advertising and got two patients. In a functional medicine practice, it is often common for that lifetime value of that patient to spend anywhere between three to \$5,000 a year with you. That means you spent \$500 to make between six to \$10,000. So that is a win from a marketing and business perspective. And of course, if you spend \$5,000 on marketing and only got one patient, then we need to revisit our marketing. That is why establishing marketing metrics and following them is so important.

Kara Ware: ([15:16](#))

Establishing metrics and tracking can quickly take us into the weeds. Of course this is important, so we're going to talk about some key terms that you want to be aware of so you can do more research or make sure your marketing expert is following these things so you don't end up like you, having no idea what to talk about and not getting anything in return.

Kara Ware: ([15:37](#))

Two big ones that we're going to introduce today are UTM ad engagement and conversion tracking. We're still both trying to wrap our heads around this, but Nathan, go ahead and break it down even more into a simpler form.

Nathan Morris: ([15:50](#))

Yeah. Big question I had, and I got no help with was how many people went from my ad, blog, email to the specific landing page or product? And I got blank looks when I asked this, and it was very frustrating. This is gold because as the saying goes, what you can measure, you can manage.

Nathan Morris: ([16:08](#))

Let's talk about UTMs. Guys, just a warning, do not get too deep into the weeds as Kara said, but let us



go into what UTMs are. This may be a little too much information, but they are called urchin tracking modules. That's just a little explanation of what UTMs are. Basically, all they are generated codes, which there is a free UTM builder on Google, which is great, where you basically put your campaign name, your social media source, where it is coming from. Is it coming from Facebook or is it coming from Instagram? And then you put your keywords in there. There's five things you can put in there.

Nathan Morris: ([16:52](#))

What it's going to do is when someone ... you've created this wonderful landing page, and you're going to go on your social media, whatever that may be, and you're going to give them a link to click. Well, that landing page, you are going to put the landing page link in there, but it is going to have these codes attached to it through this UTM builder. What happens is this other great free service called Google Analytics, which keeps up with all this in the background, will tell you someone on Facebook saw your ad, liked it, click the link, and went to your landing page. That is important because you are going to see, "Hey, you know what? Facebook is where I get the most traction," or "Instagram or Twitter is where I'm getting the most action." So it sends them to your website, but it attaches these codes that Google can read.

Nathan Morris: ([17:43](#))

That's really where UTM's fit in, is that they're going to give us insight into what's working and what's not, and then we're able to monitor that with Google Analytics.

Kara Ware: ([17:54](#))

And then also you wanted to talk about conversion tracking and that gets into something different, right, than UTMs?

Nathan Morris: ([17:59](#))

Yeah. Conversion tracking that is a little different because if you are on your landing page and someone signs up, that is a conversion. So, conversion tracking is a little bit different than UTMs. UTMs do not do that, but conversion tracking you will have to get your web guys to do this probably, it was too complicated for me, but it can tell you exactly who went to this page and did a desired action. Fascinating that this information is available to me, but I think it's really important to know, are we doing what we think we're doing with our advertising?

Kara Ware: ([18:33](#))

Yeah. These are all really good points, but who's got time for all this, Nathan?

Nathan Morris: ([18:39](#))

That's a great question. I am lucky if I can just post a blog on occasion. My big thing is, sounds like it's a good idea to hire an expert and have them report all of this back to you.

Kara Ware: ([18:53](#))

I'd say so.





Nathan Morris: [\(18:58\)](#)

Kara, with all of the above mentioned, and there's some complexity here, there's no doubt, which by all means does not indicate a provider can't do it. If you do not have anything on the nights and weekends, that is great. There seems to me to be a need to have an expert involved. I've been working on this and this has become my conclusion; "Damn it Jim, I'm a doctor, not a marketer."

Kara Ware: [\(19:18\)](#)

Great point, Dr. McCoy, I mean, Nathan.

Nathan Morris: [\(19:21\)](#)

For all our Star Trek nerds out there.

Kara Ware: [\(19:26\)](#)

Let's go back to our interview with Whitney Kolterman to hear about why hiring an expert can be an important part of your marketing strategy.

Whitney Kolterman: [\(19:34\)](#)

Yeah, I am really a fan of hiring experts. The reason for that is because I think in the long run, it will end up saving time and money because you have somebody on your team who can do these things very quickly [inaudible 00:19:50] expertise it is. So, I would say in finding someone to ask for their portfolio or for their performance KPIs from previous clients, for example. Ask them what were they able to achieve and how, and to share some examples.

Whitney Kolterman: [\(20:07\)](#)

And then I think another important component would be to set some really clear budget expectations for the paid ads. So, someone, for example, with experience working for a very large organization with a huge budget may have difficulty let us say being nimble and conservative with a smaller budget and timeline. So, you are going to want to make sure. That is not to say that that is always the case, but I would say just to explore a little bit about their experience with depending on your own budget. I think that most folks start with a very small budget. Or like, "We have practically nothing to work with," let us say, "what can you do?" And just see what their response is, and if they are comfortable sort of being nimble and being creative in their marketing tactics. And then to set really clear business goals and be specific about key audiences so they know what platform strategy to implement as well as team capacity to build and tracking performance and reporting out on goals and all of that.

Whitney Kolterman: [\(21:08\)](#)

I think you asked about where to find folks. I think that LinkedIn is always a great place to start. I am a fan of LinkedIn and searching for folks on there. There's also an organization I think it's called Marketing Circle that has some good resources for folks in the marketing space who are looking for freelance work and maybe available, let's say on a part-time consulting basis.



Whitney Kolterman: ([21:33](#))

I don't necessarily think that folks have to hire someone full-time right now. Sometimes it is just a matter of having some help getting set up and to help to ask you the right questions so you can brainstorm about your audience, about your goals, what you are trying to achieve, and have them put the structure in place. Have them set up those spreadsheets and walk you through the process of here is how we are going to track the performance of our different campaigns. Here is what we are going to measure. And here's what you need to do on a monthly basis to be able to report on the success of things.

Whitney Kolterman: ([22:09](#))

And then they may be able to dial back their hours to a minimum once that's all set up, then you can scale back and just have them either do the reporting or some of the posts for you or whatever, or you can really ramp it up and have somebody partner with you on more of a full-time basis. Either way, there's room to scale I think, and there's ways to get creative with your budget. I would definitely say that it's worthwhile to have the help of an expert especially at the beginning as you're getting started.

Kara Ware: ([22:39](#))

And get that system's processes designed. That's the hardest part is where do I start if I don't even know what I'm doing?

Whitney Kolterman: ([22:46](#))

Yeah. Exactly. I think that's the part where we'll be able to really help you simplify.

Kara Ware: ([22:57](#))

Nathan, let's summarize where we've been in this episode. We talked about the best bang for your buck. And Whitney did say that social ads, although don't throw away your email and still highly effective as your old snail mail or anything else you're doing, you don't want to just have one strategy, but social ads are going to be really the best bang for our buck starting out.

Nathan Morris: ([23:17](#))

Great point, Kara, And selecting the best social channel for your avatar to place ads. Probably not Tik Tok. I say that Kara, but there are some doctors that are using it highly effective as they have a young demographic, and they are trying to reach 15- to 25-year-olds. So it's not bad, but it's not in what I need to be doing.

Kara Ware: ([23:37](#))

And define your key performance indicators, those KPIs, with metrics you can follow over time to measure your success.

Nathan Morris: ([23:45](#))

And then finally my big recommendation from today's episode, hire an expert to help with the technicalities and any idiosyncrasies of doing this.



Kara Ware: [\(23:54\)](#)

Right. Right. My biggest takeaway is to ask the expert I am going to hire, because I'm learning as we learn all of this this season, then I'm applying it to our Good Medicine *On the Go* events. So, I am in the process of hiring an expert to help me promote our events, Nathan. Now I know to ask him, "Hey, will you provide me the spreadsheet with screenshots of each ad and update me on the effectiveness and track my UTM codes and what's happening in Google analytics and how many people said yes from that ad and went to that specific landing page and how many new leads am I generating from that ad and how many new email addresses am I collecting and how is it driving traffic to my website? These are all really important questions to know ahead of time, as you mentioned earlier, to know the language, know the business so that you can make your expert accountable.

Kara Ware: [\(24:47\)](#)

I just mentioned Good Medicine On the Go events, and this is going to be Nathan's and I's next endeavor. We wanted to have a way to engage with you more deeply, our listeners. So, we chose our season one content, which was an entry point for providers new to nutritional genomics. So, if you have not listened to season one just yet, I highly encourage you. We narrowly focus on 25 snips that apply to patient's top objectives, which are mood, immune resilience, personalized nutrition, and exercise for weight loss. We have in events line up, anything from case studies where you can submit your patient's history and genetics and Nathan will review them each month.

Kara Ware: [\(25:32\)](#)

We also have Dr. Dan Kalish come in correlating a genetic report with functional medicine biomarkers and Dr. Denise Furness, who's also going to be taking a look at connecting a nutrigenomics report with the Great Plains oats test and then the business implementation of nutritional genomics into your practice. Take a look at our upcoming events starting in May in the show notes.

Kara Ware: [\(26:01\)](#)

As we mentioned, our marketing expert, Whitney Kolterman is the Marketing Director at the Kalish Institute. Check out the link to the Telehealth Business Essentials Bootcamp in the show notes. The next bootcamp begins in August. It is eight weeks. And it is a deep dive on all aspects of running a profitable functional medicine practice. The bootcamp covers topics from setting up your telehealth practice, to financial and business planning, sales, and marketing, and then it covers the essentials for both telehealth and the brick-and-mortar practices. Specifically on the marketing side, since that is what we are talking with Whitney, the Kalish Institute Telehealth Business Essentials Bootcamp offers a framework for setting up the marketing strategy from start to finish so it is easy for you to put it into action. Remember, take a look at the link to the Kalish Institute's Telehealth Business Essentials Bootcamp in our show notes.

Kara Ware: [\(27:03\)](#)

We hope you are enjoying this season. Remember, you can go to [karawarecoaching.com/podcast](http://karawarecoaching.com/podcast) for blog posts and resource materials, and also in the show notes, go ahead and click on that link to join our



newsletter.

Kara Ware: [\(27:20\)](#)

Thank you for listening as Nathan and I reimagine the functional medicine journey. I would like to thank our writing team, Kelsey [inaudible 00:27:28] and Paul Larkin, and our audio engineer, Isadore [inaudible 00:27:33].

Kara Ware: [\(27:34\)](#)

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