**TRANSITION DOCUMENT**

**Name of Client (Person Signing Contract):**

David Dick CEO

**Practice Name, Tagline, Address, Phone, Fax, URL:**

Womens Wellness Center

**Client Key Personnel (with Phone & Email Info):**

Kim Reiger, Director of Marketing

David Dick, CEO

Sara Castellanos, DO

Elyse Brock, MD

**HSS Team:**

***Marketing Consultant:*** KG

***Account Manager:*** Heidi/Niki

***Writer:***

**How did this organization come to be a client of HS? Why are they interested in marketing now?**

I have been speaking with Kim for years. She fainlly came on board last year for an onsite, then contracted for training only at that time. Things have changes significantly since I visited . At the time, Sara was still independent. The hospital had hired Dr. Brock in an incubator contract. She works for the hospital but practices with Sara. Sara had gone through a number of staff memebers, mostly quitting due to Sara’s presonality. During my visit, the problem with Sara as a manager became apparent. Shorlty afterwad, the hostial muscled her to become a hospital employee. So, now that this has been finalized for awile, Huron Regional is ready to begin provmiting Womens Welllness Center.

**What are the timing issues discussed with the practice?** (E.g., new doctor coming on-board, training needed ASAP, need stationery now, etc.)

Nothing specific.

**Marketing & Practice Objectives:**

* Make Sara more likeable. She is personalble as a doctor, just started a lot of talk in this VERY SMALL town due to disgruntled employees.
* Stop outmigration
* Compete with “comprehensive care” (peimary, OB and pediaric)
* **Positioning:**
* Big City Care
* Specialists

**Unique Value Proposition, Differentiators & Strengths:**

* Training and credentials of the providers

**Barriers, Threats & Weaknesses:**

* Hospital Repuation
* Sara’s repuation

**Projects/Services On Contract:** (Include any details discussed, why you sold these products/services, and what their priority is.)

* Collateral
* Website
* Landing PAge

**Training Issues / Expectations:** (Please oiutline the issues as you see tham and *exactly* what you want included and what the client is expecting. Include typf of training, total number of days, and issues to be covered on those days.)

* Already done, they will expect Lori to continue to support through Spring

**Gateways:**

* We need to update

**Most Desired Gateways***(Of the above gateways, which ones do you most want to promote?)*

* same

**Marketplace Profile, Target Audience Demographics, Etc.:**

* See plan

**Prior or Existing Marketing Efforts / Current Advertising:**

* See Dropbox

**Media History:**

* Do we have their authorization to place media form?
* Not yet

**Offers Tried:**

* See previous promotion

**Offers HS Recommended:** (If any)

* We didn’t discuss

**Competition:** (List all competitors. Also share any specifics abou thte compeititive situation that were discussed with the client. . Please include websites, even if you have to search for them!)

* [Click to type]

**What, if any, are the additional HS opportunities beyond the current contract?** (Please explain the opportunities as you see them and why were were not included in the current contract/phase.)

Increased digital

Traditional

More training

*– end –*