

**Ep #363: Daisy McCarty - Your Brand Messaging -
Differentiation in a Commoditized Marketplace**



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Dr. David Phelps

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Welcome to the Dentist Freedom Blueprint, a podcast about freedom—freedom from expectations of society and the traditional path to success that has been ingrained in us from our early years, I'm joined by mavericks, renegades, and non-conformers to discuss an anti-traditional path to financial freedom, freedom of time, relationships, health, and ultimately freedom of purpose. My name is Dr. David Phelps. Let's get started.

David Phelps: Good day, everyone. This is Dr. David Phelps of the Freedom Founders Mastermind Community and the Dentist Freedom Blueprint podcast. Today I'm excited to have as my guest on the show Daisy McCarty. Daisy is a Branding Marketing Strategist and a Fractional Chief Marketing Officer with The Marketing Blender. Got it. Almost threw that out. The Marketing Blender. I had the privilege to meet Daisy and a number of her colleagues at a client appreciation meeting a few weeks ago and I was really intrigued by the area that Daisy brings to the forefront here today, which is branding. We're talking about branding today and where branding fits into the larger scheme of marketing.

And I'll be honest, Daisy. Branding to me, and I think to a lot of people, and you can correct me if I'm wrong, but maybe from an outsider who hasn't really studied branding as you have and maybe the importance of it, a lot of us think about branding as being what big companies have, like Coca-Cola, "Things go better with Coke," or FedEx, "If you absolutely, positively need it overnight," it's FedEx, or Disney, "The happiest place in the world." I mean, it seems like it's kind of big company taglines. Let's just dig in. Why don't you tell me from your

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respective standpoint, your experience, what is branding and why is it important? And for what size company is it important for?

Daisy McCarty: Sure. So, you're correct. A lot of people think that a brand is about a tagline or a logo, but it is much more than that. Brand is really the essence of your business or your practice as perceived by others. So this is an important point for practice owners to understand. Your brand is not just whatever you think it is or what you say it is. It's definitely very interactive. It's something that you build with your audience, which means you need to intentionally and consistently cultivate your brand story so you're the one directing the narrative and your audience is participating in that. It also means you really need to do a deep dive into knowing your audience.

In terms of how big your company needs to be in order to have a brand, the question is really, do you want to grow and maintain and sustain your business? Because that's the key question of whether or not you need a brand. If you're already working at full capacity, you can do that from now to retirement without ever gaining another patient or customer and there's not really an upside to investing in a whole lot in branding. That's fine. There are businesses that are at that stage and it's not a problem, but for most of the people that I talk to, they're actively looking to grow their revenue, their client base or patient base, and so they do need to invest their time, energy and thought into their brand.

And what makes a brand work is that it needs to be aligned with what's authentic and what's relevant. And that's what makes it easy to do branding consistently

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because it's true, number one, and it helps to gain traction because it's what your patients or your client base cares about. So there are a few different aspects of branding that most people would recognize if they see it, but they don't necessarily know the terminology around it. There's brand identity, which are the things like your logo, the colors, the look and feel and style. I did some work for Kaiser Permanente a number of years ago. They have a 40-page style guide that lays out every single thing about how their brand looks, down to how many pixels there need to be between the logo and another element on a webpage.

So they're very, very consistent in their branding. And the more consistent smaller organizations can be, just looking at their social media versus their website versus print ads that they may be doing, making sure that that's consistent, that's important. And there's the brand messaging, and this is the area where I spend most of my time working with clients, and that's how you communicate with the personas that you're trying to reach and moving them through their customer journey. So in the healthcare space, this is a very emotional decision that people make when they're determining who to trust, because they're in a very vulnerable state during healthcare encounters. So there's a lot of sensitivity to branding. It's a very heightened, emotional environment.

They may have a lot of fears and concerns or hopes around what the experience is going to be like or what the outcome is going to be like. So in terms of understanding your patient persona or your buyer persona, you really need to have an understanding of who they are, how they perceive the problems that they're facing, what are their

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emotional drivers, who's influencing them, and where they might turn for advice, even down to things like how they define personal success. So, what's going to make them feel good about themselves? How do they like to communicate and how do they learn? So this goes to patient education, and what mistaken assumptions are they making?

So what can you help them learn before they have their first in-office encounter that's going to make them more comfortable and more open to the treatment recommendations that you're making? Understanding what they love and what they hate, what other brands they're loyal to and why? So, what are the kinds of things that fascinate them and make them pay attention? And then, of course, how do they define a good experience and a successful treatment, because there's often a gap between what a patient thinks is a good experience or outcome, and what a clinician would. And then your brand is also a promise that you're making. So your brand promise is the thing you know you can do for every patient who walks through your doors.

It's what builds trust when you market and act in alignment with your brand. So it's definitely not just a logo or the name of your practice. It's every touch point in the promise you're making. And finally, the thing that we talk about a lot at The Marketing Blender is your incomparable advantage. This is the thing you do better than your competitors, that is hard for them to imitate, and matters a lot to your patients. So if you hit those three things, if you can identify that incomparable advantage or create one for your brand, that's the secret to being unstoppable in your market. Sometimes it's inherent. Sometimes it's

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more strategic and tactical if you're offering very similar services or solutions as your competitors are, but taking the time to do marketing and patient experience right around your comparable advantage is very important.

David Phelps: That's a really helpful framework, Daisy. So you talked earlier about the brand story and how one needs to create that through an understanding of who their audience is, who their customers or prospective customers are. So it sounds like it starts there because as you said, whether you design or create a brand intentionally or not, you've got one. You've got one. So if you want to be in charge of that, it sounds to me like, rather than being a company that says, "Well, come one, come all, we're all things to all people," that's not going to differentiate anything in the marketplace today. You can't just open up whatever your shop is, whatever your services are, and hang out the sign, in dentistry, like, "We fixed teeth." I mean, you can do that, but where's the differentiation, right? I mean, you're commoditizing yourself there, would you say?

Daisy McCarty: That can definitely be true. I think one of the rabbit holes that people go down when they're understanding what their niche is, is they think it has to look like a specific kind of person. They get caught up in demographics and they don't really pay attention to psychographics. So the kinds of patients that you want to attract don't necessarily fit in a neat little box when it comes to their income level. Obviously geographic reach is important, but sometimes it has to do with what they value and what they share in terms of their viewpoint on the world and things like that.

So some of these things are more intangible, but if you can identify the patients we're most likely to see, the

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patient experience that you provide as highly valuable to them, if you have aligned values with those patients, the ones who are most likely to be highly satisfied with the service that you're providing, the ones who are most likely to tell others about it, there are ways to define your target market so that your branding speaks specifically on an emotional level to that aspect of that patient demographic.

David Phelps: That's really great, Daisy. So when you're working with a business, a company, to help them develop their brand messaging, their brand story, just give us an example of how you would help that company or that business determine the psychographics of their ideal. And do you have different avatars? I mean, can you have some different ones, or do you try to blend what one avatar that has the aligned values, as you talked about, that really appreciates the experience? How do you help a company really develop that if they've never really looked at this at all?

Daisy McCarty: Sure. So, typically organizations will have more than one persona that they're trying to reach, unless it's a very new company that has just early adopters and they cannot afford to stretch themselves across a company to multiple personas. So we definitely look at segmenting the personas, for example, in a healthcare setting, marketing to parents. Marketing to mothers is different than marketing to fathers. They have different questions, they have different emotional triggers, different hopes, fears and concerns. So we would definitely segment parental marketing in different ways.

Somebody who is running a cosmetic dentistry practice would market to a different set of personas than someone

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who's running an orthodontics practice, obviously. So in terms of understanding how your patients think and how they feel, the best way to do that is by having lots and lots of patient interactions. So if I was working with a healthcare organization, I would obviously be speaking to the clinicians about their experience and their conversations, but definitely talking to the front office staff as well, because those are the people who are having the warm-up conversations, answering questions.

They know what patients are looking for. They hear complaints a lot, so that's a very good way to understand that. Definitely anytime that you can look at patient reviews, you're going to get a lot of insight, usually on the negative side, because people are more likely to post reviews when they're upset than when they're happy, unfortunately, and we'll probably talk about that in a minute, ways to handle that. But obviously the best way for me to gain insight information is to speak to my client's customers. In the healthcare setting sometimes that's appropriate, sometimes it's not, depending on the kind of relationship that physicians and dentists have with their patients.

Obviously there are always privacy regulations to be mindful of, but typically when I'm working with a business owner, they've had enough conversations with the people that they're serving, that we can draw on their knowledge to build an accurate persona. They just haven't had anybody take them through the process and ask them the right questions so they understand what's actually important, because they may know 500 things about the people that they serve, but there are only a dozen of them

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that matter when it comes to having a powerful brand message and powerful marketing.

David Phelps: Hmm. So once you've developed or at least initially developed your brand story, your brand message, then I know there's different media channels that you utilize and any company should be utilizing, but give us some ideas then, that how is this brand message story then communicated? I mean, obviously, you talked about website, so I mean that's relatively obvious today. If you're a company of any size, you need to have a presence on the web because people are Googling everything today. So, start with that one and then what other ways do you show up? Can you show up to the marketplace with your brand message or story with website maybe being a keystone? Or you take it from there, Daisy.

Daisy McCarty: Sure. So, website is definitely a major factor. The rule is always, go where your buyers are. So the answer's going to be different for every organization. I work exclusively with B2B companies so we are always on LinkedIn because that's where that client base is. For the healthcare sector people might be anywhere from TikTok to Instagram to Facebook. So it depends on which demographic you're targeting and being able to understand what they want to see on those platforms. I think that one of the more important questions there is about messaging pornography, because this determines what you say, when and where. So if you have, for example, ads that you're running, this is very top of funnel.

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It's in the attention phase, just grabbing that first bit of awareness. That's where you're going to have messaging that is about emotional triggers. Just something to catch attention. It validates someone's pain. It gives them something to think about. Sometimes it uses humor. It's something that has an emotional impact. When you move into consideration stage, definitely the website comes into play. This is where patient education becomes very important. I definitely recommend that business owners be on YouTube and putting their face and the face of their team members and the face of their patients or customers, if that's appropriate and accessible, onto YouTube. Make sure you have plenty of content. Google loves that. It helps your website rank better as well as attracting more people into your brand.

And that's your opportunity to give people light bulb moments, to help dispel their mistaken assumption, to help people feel more confident and more comfortable, and to prove that you can do what you say you can. And then that's also the place where you might be using downloads and blog articles and thought leadership content. And as you move into the decision stage where people are actually making the decision to invest their time and money, that's where you would be using things like the patient intake process, for example, making sure that that's well branded and it's very easy for people to navigate. And again, that would be, your website would come into play there as well. So the website really follows that entire sales journey from initial awareness all the way through to closing that engagement.

David Phelps: That's really helpful. So just to recap that, this is the client or patient journey, depending on who your customers are.

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This is what you call the journey. And so you talked about initial awareness, the advertising that first catches the eye and that needs to have some emotional trigger to it. It could be humorous, it could be validating a pain point, but something that draws that person in, and I guess there's a real connection to them, right? It connects with something they're feeling, and so that's the awareness.

And then assuming that that awareness triggers the person to want to do a deeper dive, then now you go to the education process. Education before decision. Education, and that's where you talked about YouTube as being a great one, downloadable articles, blog posts, that sort of thing. And then to the point in the journey where the person is actually making a decision. That would be the journey in three stages overall?

Daisy McCarty: Yes. It's awareness, consideration, decision. And of course, that can be labeled different ways. Everybody has their own steps and stages-

David Phelps: Right.

Daisy McCarty: ... but those are the basics.

David Phelps: Right. Okay. No, that's very, very helpful. Very helpful. So let's talk a little bit about the actual culture of the business, the team, which has got to start with the person at the top. It's got to start with the owner, the CEO, right? I mean, that's where culture starts. My point is this, and as a marketer and a company that does marketing for firms, you can do all this great work that you're talking about, branding and setting up all the advertisements in the social media and all that.

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But if the actual experience, because the culture of the business and the intake... You talked intake, it could be a person on the phone. You talked about that person. If that's not congruent with what's putting out there, then all the work that you would do probably goes for naught. I mean, my question is, when you're potentially taking on a client, Daisy, how deep a dive do you do with the actual culture of the company to make sure, hey, they've got their stuff together. Maybe they're aspirational about what they want to do, but if they're not there yet, how do you deal with that?

Daisy McCarty: Sure. So vision, mission and values and company culture all come into play when we talk about brand messaging, because, again, this comes down to the truth. What's the truth about your brand? And the truth is every experience that someone has with your brand. So if there are areas where there's room for improvement, we definitely identify those. And that comes down to, what's the commitment of leadership to improving constantly in the areas where they've identified? And sometimes they know that because they need to do those things because they see a competitor who's doing something much better than they are, and they want to strive to reach that same level. And sometimes it's something they know that everybody in their industry is doing poorly and they're like, "Okay, this is an area where it makes sense to invest our energy and our focus to make things better."

It's interesting. Often my clients will use the brand message playbook that we develop that has their buyer personas and all their messaging to train their incoming staff. Not just their sales people, not just their marketing person, but everybody who has an interaction with their

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customer base or their patient base. I would say that patient experience probably makes up 80% of a brand, and so this is an area where it's absolutely essential to invest the time and money. Looking at what people complain about online about practices like yours. Not just about yours, but what are people complaining about in general? Those are areas where you can definitely differentiate and create that advantage. And it's not necessarily about the skill of the provider in those cases. A lot of complaints are about the front office staff, the experience from setting an appointment to the office itself.

And I get it that finding and training and keeping good staff is one of the hardest things about running a practice. I hear this from every healthcare practitioner that I talk to. It's so difficult, but it's absolutely essential that everyone who's interacting with a patient understands what the values of the organization are and what the expectation is around that patient experience. One big piece of this from the outward perception angle is the reputation management, and that's not just about responding to negative reviews. And by the way, I don't advise doctors and dentists to respond to the negative reviews themselves because that can be very emotional. Have someone who's trained and able to do that for you in a compliant manner, because there are, of course, with HIPAA regulations, there are things you can and cannot say in reviews.

But it's also important to respond to and appreciate all the positive reviews. So every single review that's left for your business, if there's an ability to respond, there should be a response. It's also important to actively cultivate positive reviews and know when is the right time to get those, and

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what methods should you use to acquire them. So email follow-up, you'll get some. For today's generation texting a request might get a better response. There's also the opportunity when the staff calls to follow up or when the dentist calls to follow up with the patient to just make a personal request, because that has an emotional component to it.

And there's also the option to capture reviews while the patient is still in the office if you have a kiosk for that. But, again, it's about timing. So if they just had a very painful procedure and they can't feel their face, not the right time. During the follow-up visit when they're feeling great and they love how their mouth looks, that's the perfect time. If you use a kiosk in your office, it's also very easy to figure out which review sites you want them to leave reviews for you on. So if you've got a whole bunch of stuff on one review site, but you're like, "Okay, well, we're not showing up as much on a different review site," you can determine where you want those to be placed.

David Phelps: I've heard some companies, and I'm not sure what the system is to do this technically, but when they are requesting soliciting reviews, that if they get a review that's less than, say, a five star, that that review stays internally and gives the company the opportunity to reach out to that person before that review goes live. Is there ways to sift and sort a little bit? I mean, I know that... Okay.

Daisy McCarty: Yes. It depends on the review site. With Google five-star reviews, if you're running that as part of your website, you usually have that capability. If it's an outside review site, you probably won't, in which case you will need to

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respond in some way to those, but definitely never miss an opportunity to learn more about how to serve patients better. And sometimes it's about learning how to weed out potentially problematic patients before they become part of your practice. I would definitely recommend, look at what cosmetic dentists and what cosmetic surgeons have been doing for the last 10 years, because they were way out of the curve.

Other practitioners are just now starting to make inroads in doing marketing well. Back 10 years ago I was working with cosmetic surgeons and dentists and specialists in areas like fertility where all of their patients are private pay, and so they had to know how to attract those patients. Now your patient base may be entirely different, but they care about something. So, knowing what that is and communicating about that is very essential. I would say also in terms of branding, digital is where a lot of practices are really falling down, and this is not just about not having enough content out there or not having it optimized, but also taking that opportunity for interaction.

So I have seen dental websites where no one is responding to blog comments. You have prospective patients who are asking questions about procedures in the comments. Why are they asking questions? Because they want to have some work done. Those are leads that are just going to waste. Whether you choose to publish comments or not, it's a potential lead source. Someone needs to be monitoring that, and it should not be your web development people-

David Phelps: Right.

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Daisy McCarty: ... because they don't work in healthcare. Someone needs to be responding to YouTube comments. Someone needs to be responding to contact form fills. This one I see also. I've been in a dentist's office before where they don't know where the contact forms go. That's a web designer's deal. The people in the front office or reception who should be getting those forms and reaching out to set appointments, no, they're not. How many tens of thousands of dollars are just being flushed away because nobody's responding? And it doesn't just mean you're missing that opportunity, but also the opportunity to make a great impression for that patient's friends and relatives and the people that they will would be referring to your practice. There's also an opportunity... Speaking of video, again, not just on YouTube, but have a tour done of your office, one of those Google 360 tours. Most of your competitors are not doing that.

How open and transparent are you being about the experience that patients are going to have? And then in the patient intake process, forms should be automated, not just digital. So now most practices have forms that you can go online. You can't do it on your mobile because it's like this tiny thing, and you have to keep on moving it around to get to it, but forms should be autopopulated. If there's a known field, your name, your address, your date of birth. That's not changing from one form to the next. We have the technology to auto fill those, but most practices are not building that into their patient experience. And as that patient demographic gets younger and younger and younger, their expectations for a smooth digital experience are going to keep increasing and it's time to fix that problem now and not wait until it becomes a major pain point.

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David Phelps: That is so good in what you're describing and defining here, Daisy is, and you said a little bit earlier in our discussion that you're removing friction points. As customers today, with technology, as you said, we expect a more seamless service because we've experienced it somewhere else. And if your business, your company, your office is not up to par, then we automatically, as a customer from the outside or a prospective customer, see that as, "They're not up to par." That turns me off right there. If I have to go through some laborious intake forms, or I have to go 15 minutes early to the office and hand fill out all those forms, which we used to have to do in the old days.

But if you've got something seamless for me where it's, as you said, data filled, and I can just click a few appropriate boxes for updates, that smooths it out, and it just makes me feel like the whole process, the whole experience, is starting out on a good note versus, if I'm busy like everybody today and I got stresses and just put one more thing in front of me that makes me feel a little bit anxious or just a little bit irritated, right? It sets the tone. It sets a tone. Whereas if it's smooth, I'm going to be more upbeat and the rest of the process is good. So why not remove some of those barriers on the front end of that experience and give the patient, the customer, the prospect, the opportunity to have a free-flowing experience from the get-go?

Daisy McCarty: Absolutely. And that ties back into what is the experience that your team is having, because the more you're creating a smooth digital experience, the more time you're giving back your internal team and the higher the quality of service they're going to be giving to your patients. And

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the more time they can spend in that emotional rapport and relationship-building, getting to know your patients, asking those questions that help you further refine your buyer personas that you're marketing to. There's so much that you can do with that time that you get back if you invest in the right marketing automation and patient experience tools.

David Phelps: Super. So, Daisy, let's talk a little bit... You, specifically, in The Marketing Blender, you work with B2B, business-to-business clients, but obviously, in Marketing Blender, you can also help companies that are B2C as well.

Daisy McCarty: We all serve B2B clients. We do have a CMO now that does work with healthcare organizations.

David Phelps: Okay.

Daisy McCarty: We've got that. We've got that covered. Straight B2C, no. So, business-to-business and now business-to-patient, sure.

David Phelps: Patients. Okay.

Daisy McCarty: B2C, that's with the Coca-Colas of the world, that's not—

David Phelps: Yeah, yeah, yeah, yeah. Okay. Well, no, that's good. And if somebody's listening today and would like to get a little bit deeper dive into what they could do to ascertain where they are with their brand messaging and brand story, to your point earlier, there's so many lost opportunities and therefore lost revenue that companies that have great intentions and are probably delivering really optimal services, but if your story's not out there, if you're not exhibiting your experience in the customer journey, then

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they don't know. They don't know. And so they're missing lots of opportunities. So, how would someone best get an assessment with The Marketing Blender and see if there might be a fit or an opportunity for them to get some insights into what they could be doing to upgrade their brand messaging?

Daisy McCarty: Sure. So the best way to start is definitely go to The Marketing Blender website and start exploring the downloadable resources that we have. Road to Revenue toolkit. We have Mission and Vision workshop stuff. We have tons and tons of awesome blog content, and of course there are plenty of ways to get in touch for an assessment and consultation through the website. But definitely, take some time to look through and educate yourself on some of the topics, and it's going to be very evident to you where your particular stumbling blocks are and if this is a good fit to have a conversation to help move your business or your practice forward.

David Phelps: Perfect. Well, Daisy McCarty, I appreciate your time so much. This is very, very insightful, and in just a short time you gave a lot of nuggets and I think a lot of considerations for any business owner to be looking at right out of the gate that could make their business more profitable, the experience for both their staff and your customers, patients, clients much better as well. I think this is where we are in the world today. It's all about, as you said earlier, it's all about authenticity. You've got to show up and be an authentic company that's delivering a promise that is by design delivered.

And you also mentioned, which we didn't have time to go into today that much, but the differentiator regarding the

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uncomfortable advantage. And you also, I'm sure, help clients develop that if they haven't already discovered what that is. It's very important to have that differentiator out there as well.

Daisy McCarty: Absolutely. Thank you very much for having me on the show.

David Phelps: Thank you, Daisy.

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