RxMedicalweb
Physicians Rx for Success

A working checklist

40 points for your practice's marketing in 2026

The key points from our ten guides for physicians and practice managers, on one list you can print, mark up and hand to your team.

01 AI search

- [ ] AI assistants favor practices whose website, listings and third-party sources agree on who they are, where they are and what they offer.
- [ ] Service pages that answer patient questions directly, in plain text and with physician review, are easier for assistants to quote.
- [ ] Steady, honestly earned reviews and verifiable physician credentials give AI systems more reason to trust what they find about a practice.
- [ ] Structured data and consistent listings improve how machines read your information, but no one can guarantee placement in AI answers.

Full guide: rxmedicalweb.com/resources/ai-search-for-medical-practices/

02 Launching a new procedure

- [ ] Get consent forms, scheduling and a front desk script in place before you promote the new procedure.
- [ ] Build one dedicated service page, reviewed by a physician, so every email, listing and ad has a place to send people.
- [ ] Tell existing patients first, because they already trust you and let you test the workflow before you pay for ads.
- [ ] Track inquiries, sources, consultations and procedures from the first week so you can fix the weakest step before spending more.

Full guide: rxmedicalweb.com/resources/new-procedure-launch-checklist/

03 Google Business Profile

- [ ] Choose the most specific primary category for your practice and keep the name field free of added keywords.
- [ ] Keep services, hours and the appointment link current, and test the booking path on a phone.
- [ ] Ask every patient for a review the same way, and keep public replies general so they do not reveal patient information.
- [ ] Audit physician listings and duplicates so each legitimate profile is claimed, accurate and linked to the right page.

Full guide: rxmedicalweb.com/resources/google-business-profile-for-doctors/

04 Choosing an agency

- [ ] The practice should own its domain, website, ad accounts, listings and data, with the agency granted access, and the contract should say so.
- [ ] Read the contract for term length, automatic renewal, cancellation notice and fees, and have your attorney review anything unclear.
- [ ] Medical content, including AI-assisted drafts, should be reviewed by a clinician and approved by the practice before it is published.
- [ ] Judge an agency by tracked calls and booking requests in plain reports, and be cautious of anyone who guarantees rankings or patient numbers.

Full guide: rxmedicalweb.com/resources/questions-before-hiring-a-medical-marketing-agency/

05 Missed calls and AI agents

- [ ] Most missed calls come from limited front desk capacity at peak times and after hours, not from a careless team.
- [ ] New patients who do not get through often call another practice, and the loss rarely shows up in any report.
- [ ] Missed-call text-back and an AI agent can answer routine questions and capture requests when staff cannot pick up.
- [ ] An AI agent should use approved answers only, never give medical advice and hand clinical or sensitive matters to staff.

Full guide: rxmedicalweb.com/resources/missed-calls-and-ai-agents/

06 Reviews

- [ ] Send the same review request to every patient after a visit, because selecting only satisfied patients is generally prohibited by review sites.
- [ ] Keep text and email requests generic, handle them with HIPAA requirements in mind, and confirm consent and vendor arrangements with your counsel or compliance contact.
- [ ] Never offer discounts, gifts, or any other incentive for a review, and ask for honest feedback instead of a positive rating.
- [ ] Reply to reviews in general terms that do not confirm the reviewer is a patient, and move any negative conversation to a private channel.

Full guide: rxmedicalweb.com/resources/asking-patients-for-reviews/

07 Short video

- [ ] The best video topics come from the questions your front desk and clinical staff already hear from patients.
- [ ] Grouping topics into patient questions, what to expect, meet the team and myths and facts makes it easy to plan a batch.
- [ ] Filming several short clips in one session with talking points instead of scripts keeps the project from stalling.
- [ ] Every video needs proofread captions, written consent from anyone on camera and a physician's review of what is said before it is posted.

Full guide: rxmedicalweb.com/resources/short-video-ideas-for-physicians/

08 Website and patient privacy

- [ ] List every form, script, messaging channel and storage location on your website before you evaluate any single tool.
- [ ] Tracking pixels and analytics on appointment, form and sensitive service pages deserve the closest review with your compliance counsel.
- [ ] Chat, texting, email and form notifications should run through tools chosen with HIPAA requirements in mind, with minimal health detail in each message.
- [ ] Public review replies should never confirm that someone is a patient, and backups and old site copies need the same care as the live site.

Full guide: rxmedicalweb.com/resources/website-privacy-checklist-for-practices/

09 Your website

- [ ] Design the site for phones first and remove anything that slows it down.
- [ ] Answer the questions your front desk hears most often, and keep calling and booking one tap away on every page.
- [ ] Show accurate physician credentials and recent reviews, and have a physician review any medical content that AI helps draft.
- [ ] Measure calls and completed bookings instead of visits, and handle anything that touches patient data with HIPAA requirements in mind.

Full guide: rxmedicalweb.com/resources/what-a-medical-website-needs-in-2026/

10 E-mail and text

- [ ] Ask for e-mail and text permission separately, keep a record of it, and have your counsel or compliance contact confirm which rules apply.
- [ ] Send mostly useful content, with AI limited to drafting and a physician reviewing anything medical before it goes out.
- [ ] Time reminders to the return interval the clinician recommended, group patients by interest, and text only when the message is timely.
- [ ] Make opting out easy on every channel and keep diagnoses, treatment names and other health details out of texts and e-mail.

Full guide: rxmedicalweb.com/resources/email-and-text-that-patients-welcome/

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