



Patient Persona Clarity Checklist

Is Your Wellness Marketing Too Generic to Convert?

If your messaging could apply to almost any clinic, it's probably costing you bookings. Use this checklist to see where your targeting breaks down—and where clarity could unlock higher conversion without more ad spend.

Section 1: Persona Definition (Foundation)

- ☐ We have **at least 2–3 clearly defined patient personas**, not just one “ideal patient.”
 - ☐ Each persona is based on **real data or patterns** (demographics, behavior, services used), not assumptions.
 - ☐ We can describe each persona's **primary goal** in one sentence.
 - ☐ We can articulate each persona's **top fear or hesitation** before booking.
 - ☐ Our team agrees on who our **highest-value patient** actually is.
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Section 2: Messaging Specificity (Where Conversion Is Won or Lost)

- ☐ Our website messaging **changes by service**, not just by page layout.
 - ☐ Our ads speak to **specific situations**, not generic wellness outcomes.
 - ☐ A busy professional, a new parent, and a retiree would each feel the message was “for them.”
 - ☐ We avoid vague phrases like “*holistic care*,” “*personalized treatment*,” or “*whole-person wellness*” without explaining what that means.
 - ☐ Patients frequently say things like “*I felt like you understood my situation.*”
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Section 3: Channel Alignment (Where Generic Targeting Shows Up)



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- ☐ Our paid ads, landing pages, and intake messaging **tell the same story**.
 - ☐ Email and SMS follow-ups are **relevant to why the patient reached out**, not generic reminders.
 - ☐ Social content reflects **specific patient scenarios**, not just brand aesthetics.
 - ☐ We don't send the same message to first-time leads and returning patients.
 - ☐ Messaging adapts based on **where someone is in their journey**.
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Section 4: Internal Clarity (The Hidden Conversion Lever)

- ☐ Our front desk or intake staff can describe our ideal patient without prompting.
 - ☐ Providers understand **who the marketing is attracting and why**.
 - ☐ First visits feel aligned with what marketing promised.
 - ☐ We don't rely on patients to "self-select" the right service.
 - ☐ Our patient experience reinforces, not contradicts, our messaging.
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Scoring & Interpretation

✓ 16–20 checks

You're clear, but likely under-systematized.

Your personas exist, but they're not consistently driving messaging, automation, or experience design.

✓ 9–15 checks

Your marketing is doing too much guesswork.

You likely have strong intent coming in, but generic messaging is suppressing conversion.

✓ 0–8 checks

Your targeting is costing you bookings.

You're attracting attention without clarity and losing patients before they commit.

If your score surprised you, you're not alone. Most wellness clinics don't struggle with demand, they struggle with clarity.



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The fastest wins usually come from tightening targeting, not increasing spend.

👉 **Next step:**

Want a second set of eyes? [Book a free strategy session](#) to see where your patient personas, messaging, and experience fall out of alignment, and where conversions are leaking.