






THE JOINT[®] chiropractic

THE JOINT CORP. | NASDAQ: JYNT | thejoint.com

Marketing & Patient Acquisition
Jason Greenwood, VP of Marketing

My Background Jason Greenwood

Education	Business Experience
<ul style="list-style-type: none">• BBA, Marketing• MBA, International Business	<ul style="list-style-type: none">• 20+ years of strategic marketing experience in restaurants and automotive• 5 years as a multi-unit franchise owner and operator <div></div>

Marketing Focus



Why The Joint Chiropractic?



- **Proven, Disruptive Model:** Bringing quality, convenient, affordable chiropractic to retail; membership-based, walk-in, no-insurance franchise model
- **Market Opportunity:** \$90B spent on back pain annually, \$15B on chiropractic care; 1,700+ unit national footprint opportunity,
- **Category Leadership:** 26% patients new-to-chiropractic, 25% comparable sales growth
- **Growing Brand Awareness:** Over 1.8 million patients in our database
- **Test Kitchen:** 450+ of them!
- **Experienced Leadership Team:** Management with significant franchise experience; NFAB and Regional Developer community
- **Unprecedented Profession Support:** Pre- and post-opening, creative assets, digital programs
- **Marketing Toolkit:** Collection of best practices and “how to” step-by-step guides
- **Online Print and Fulfillment Partner:** Design and legal automation for creative and collateral
- **National Marketing Fund (NMF):** Overlays our local marketing efforts with national tools, programs and media buys

Brand Identity



TARGET CONSUMER

- Open-minded
- Lives disrupted by pain

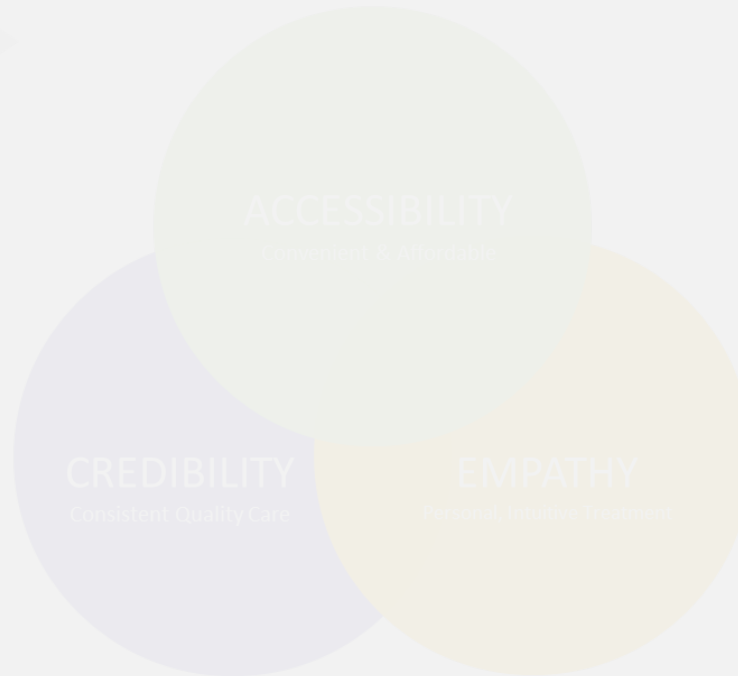
CURRENT MINDSET

- Status quo is unacceptable
- Need solutions fast
- Time and money are barriers



MARKETPLACE

- Not many easy answers to relief
- Open to a natural, drug-free approach
- Chiropractic could help, but often inconvenient and expensive



BRAND PERSONALITY

- Simple
- Sociable
- Knowledgeable
- Aspirational
- Vested



BRAND PROMISE

To improve quality of life through routine and affordable chiropractic care.

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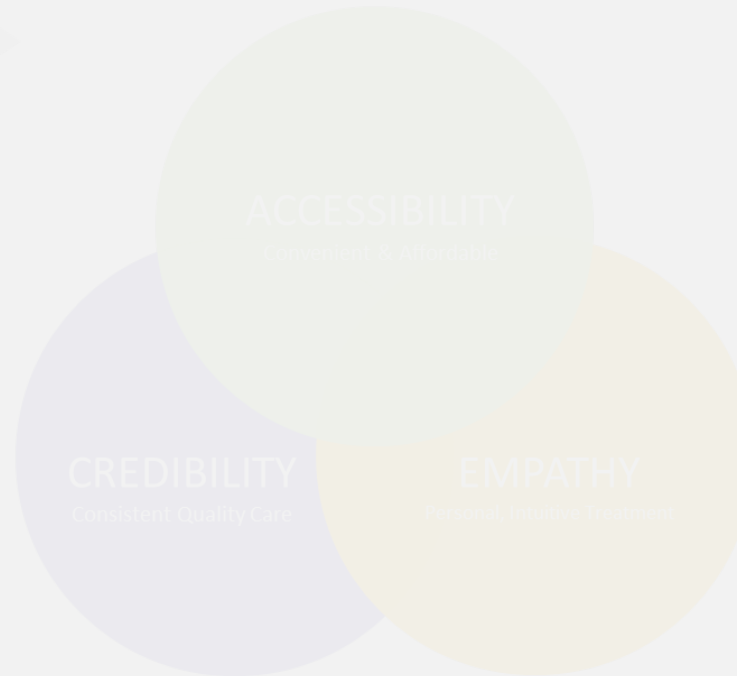
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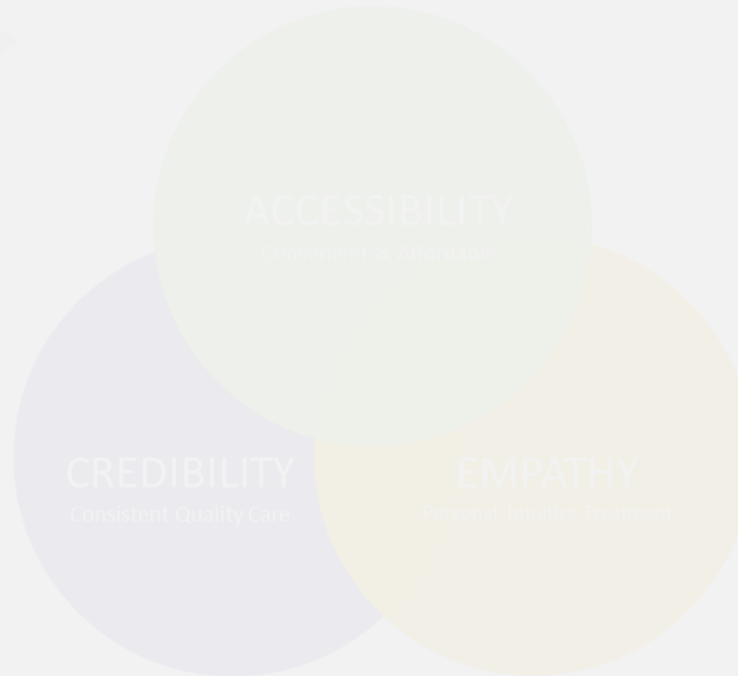
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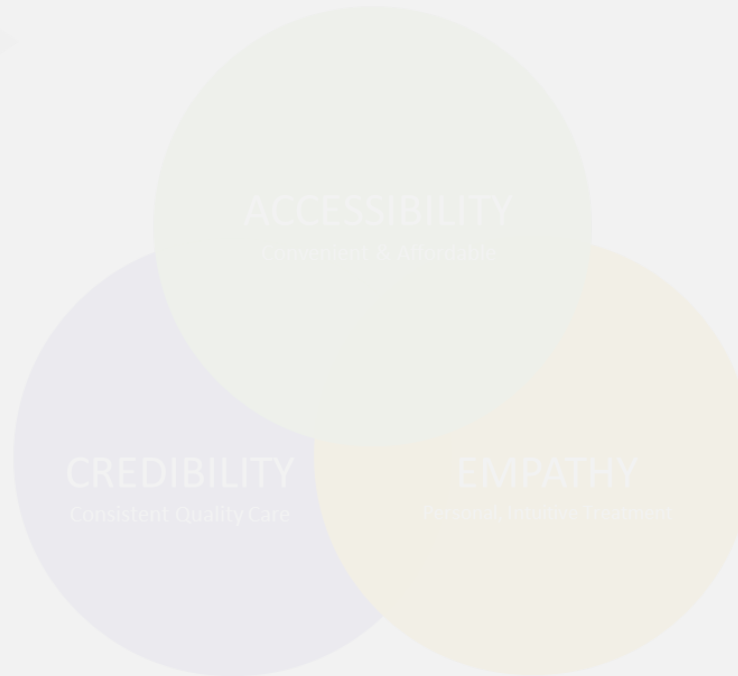
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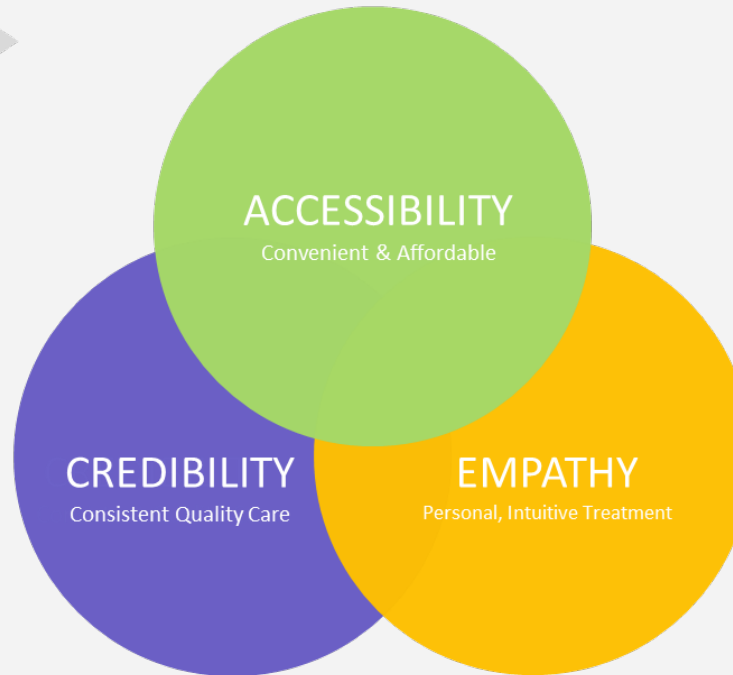
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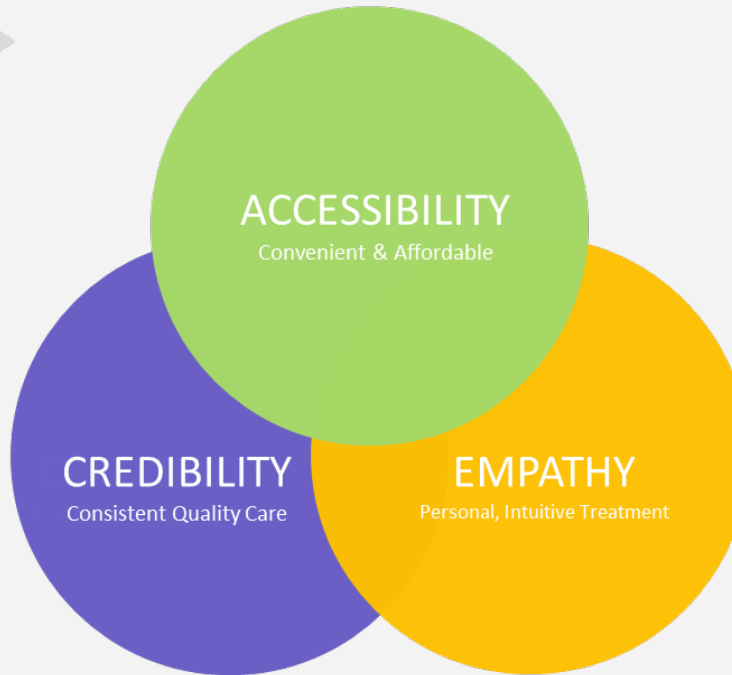
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Live a Better You



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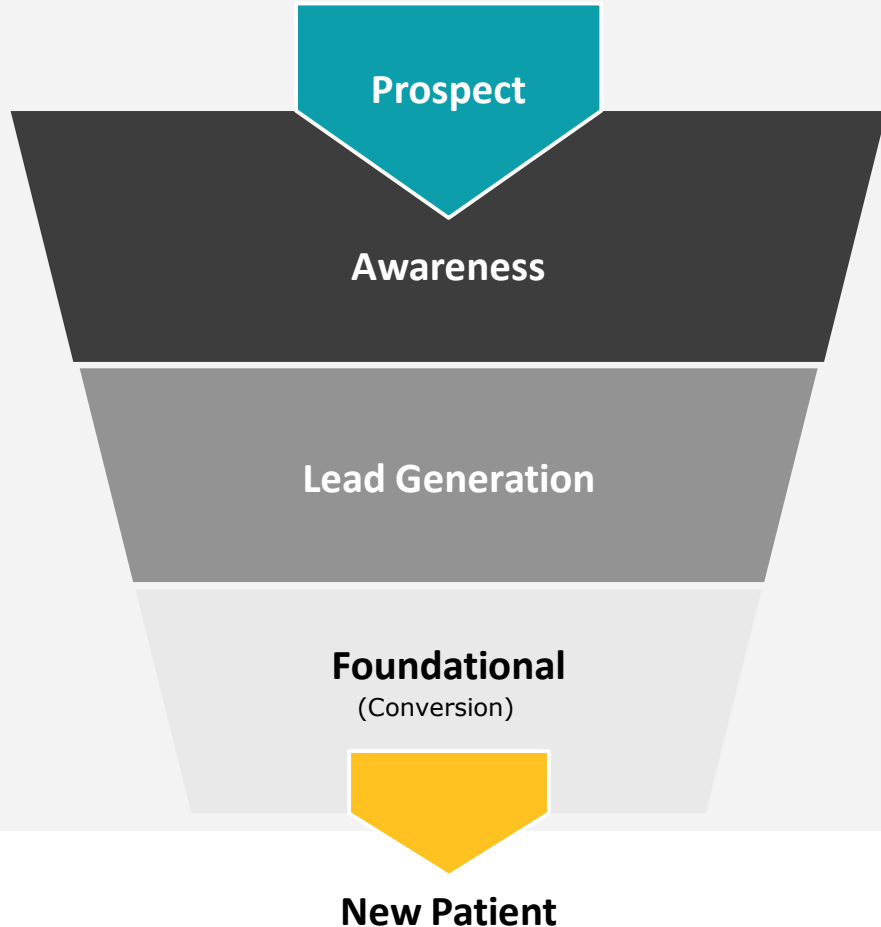
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New Patients a Lifeblood

- Significant area of focus and a key metric
- Three general sources, according to Atlas patient data in 2019:
 - **Referrals, 36%** – tied to strong patient experience
 - **Digital Marketing, 33%** – refined programs for franchisee participation
 - **Local Store Marketing, 31%** – from signage to community engagement to traditional advertising, executed locally
- Refined methodology to encourage greater franchisee marketing investment and accelerate new patient growth

Attracting New Patients

The Joint's Marketing Methodology or "Purchase Funnel"



Audiences

- Largest audience; may or may not have heard of The Joint or be in market for chiropractic
- Refined audience; actively seeking pain relief or wellness solutions (or resemble those who are)
- Smallest audience; easiest and cheapest to convert; many actively seeking a chiropractor and can be closed with the right information

Foundational Marketing

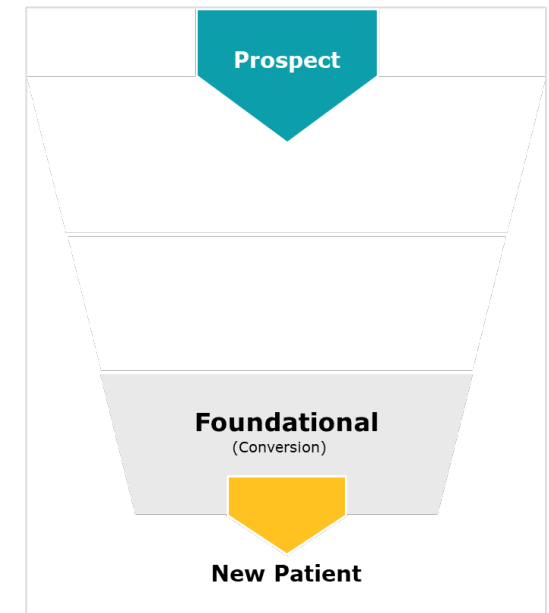
Tactics that establish visibility, trust and credibility of clinics and staff; effort here makes all other advertising more efficient, at minimal cost

SEO: Increasing visibility through organic search and social media

- Refers to unpaid results from a user queries on search engines
- Funded by NMF, facilitated by outside digital agency
- Activities include on-page SEO, business citations, review/reputation management, national/local blog content, local social media content and link building

Community Marketing: Engaging in shopping center/local trade area

- Refers to activities involving signage, sponsorships partnerships and other grass roots tactics
- Marketing Toolkit contains opportunity analysis guide, tactical ideas and best practices from the system
- DokShop.com a one-stop shop for franchisees to source collateral

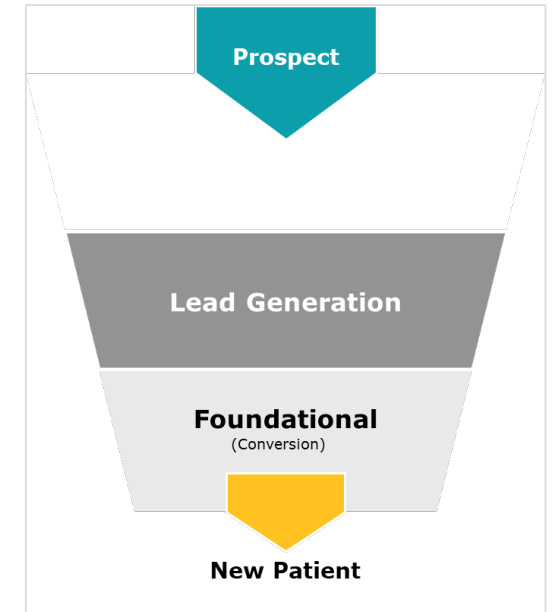
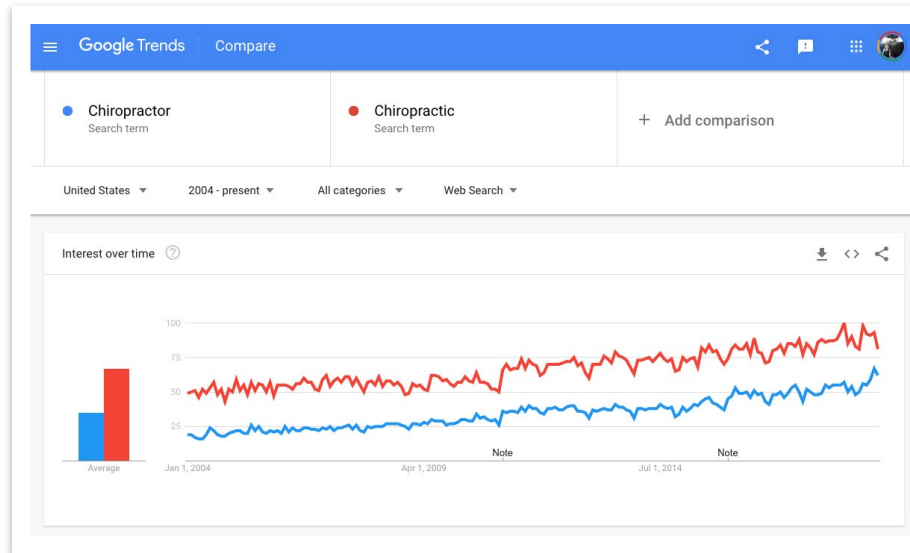


Lead Generation Marketing

Tactics that are targeted and distinctly measurable, and can be more easily tied to ROI

Paid Digital: Driving trial from self-identifiers (“relief seekers”) or look-alike audiences; paid for locally by the individual franchisee or co-op

- Primary tactic is search engine marketing (SEM); only media channel that competitive chiropractors regularly utilize
- Growing search traffic for terms like “chiropractor” and “chiropractic,” indicative of an expanding category
- Additionally, traffic-driving ads on Facebook and Instagram (SMM) and YouTube platforms



Awareness Marketing

Tactics that build name recognition and brand familiarity, fueling greater demand; evaluated by metrics such as points, views and impressions

Retail Marketing: Traditional channels driving online search and direct-load traffic, where they can be converted into a lead

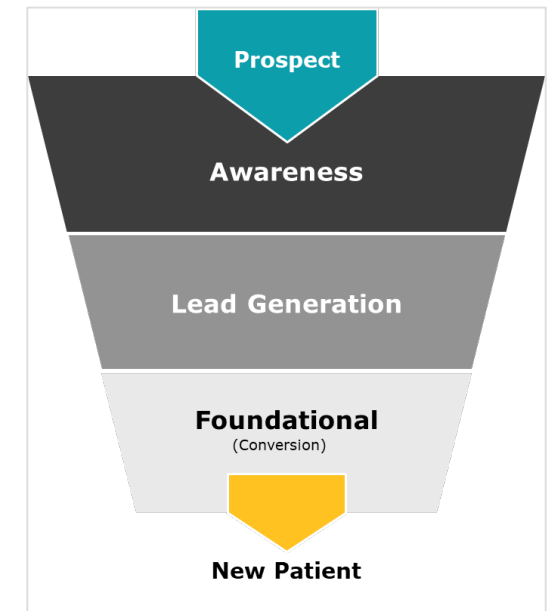
- Print can be utilized by individual franchisees or by market
- Broadcast media such as TV and radio, increasingly utilized by co-ops in heavier penetrated markets
- Outdoor (OOH) for brand and/or directional messaging, available to individual franchisees or co-ops
- Strategic partnerships (e.g., sports teams) for brand building

Paid Digital: Mimics messaging of traditional TV with enhanced targeting

- Utilize NMF to air video ads on the YouTube and Facebook platforms

Public Relations: Earned media creates content for SEO and social, helps launch new clinics, engages patient and franchise prospects

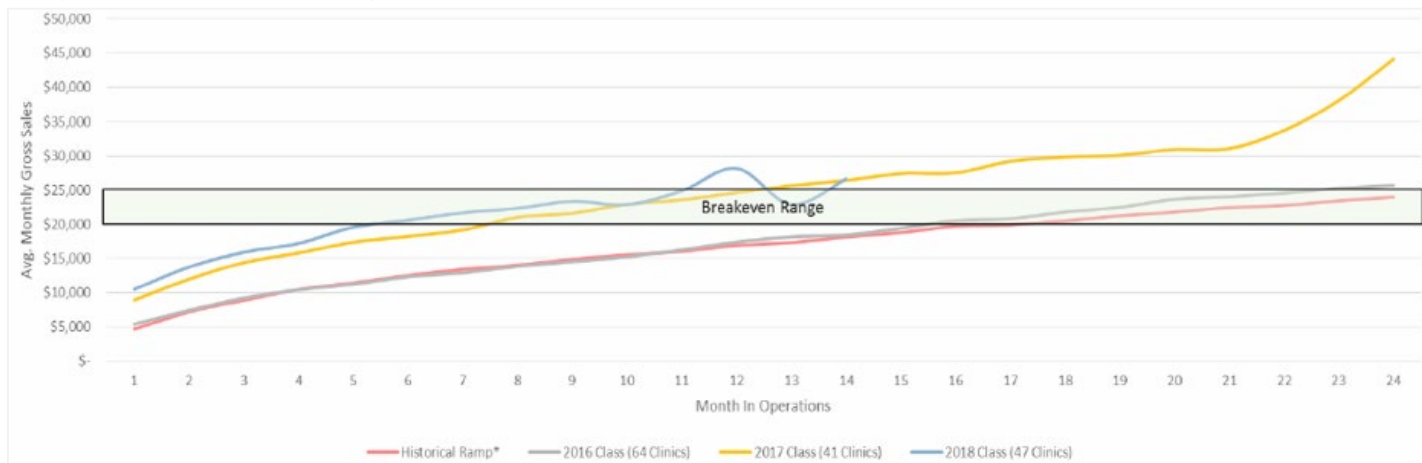
- Supports our category leadership position and stimulates national conversation about chiropractic care



Grand Openings

Turnkey program heavily driven by grassroots marketing tactics tied to fixed benchmarks

- Step-by-step, pre- and post-opening plan; activated upon lease signing
- Grass roots marketing by the franchisee with pre-registration program, PR, digital and social media support
- Marketing resource at headquarters, plus the RD or FBC in support
- Continues to enhance grand opening performance through increased adoption by franchisees; reduced new clinic time to cash flow positive from 18 to 6 months in operation on average



Two Key Projects for the Future

1

Brand Advertising: Developing our first integrated ad campaign for Fall 2019, activating new brand positioning and insights extracted from 2018 consumer research

- Objectives is to create the first recognizable consumer brand in the fragmented chiropractic category
- Designed to increase the relevance and approachability of chiropractic, while positioning The Joint as the familiar and trusted authority
- Includes refreshed television, social, outdoor and retail advertising

2

Marketing Automation (CRM): Leveraging our patient data to dramatically improve delivery of targeted and relevant, one-to-one communications to leads and patients

- Intended to enhance current email drip campaign with behavioral-driven CRM utilizing email, SMS and a patient portal/mobile app
- Goal is to deliver the right message to the right person at the right time
- Outcome will be increased lead conversion, higher lifetime patient value and greater patient satisfaction

Key Takeaways

1. The Joint has well-developed new patient acquisition and grand opening strategies that are paying dividends
2. We will be taking further steps to enhance our brand identity and name recognition, solidifying our leadership in chiropractic
3. Marketing automation holds great potential for leveraging our data and growing lifetime patient value