

# The marketing plan

*Alice Hollis*

## The objectives

Success is...

### Sales:

Creating a sustainable business, which looks like:

- [insert revenue target – link back to the business plan]
- [insert client target – link back to the business plan]

### Continuous personal development:

[insert your personal goals, e.g. training courses, reading, speaking at a conference, be invited on a podcast, writing a book]


## The strategy

To achieve sales success...

You need to target:

[insert target audience - link back to the business plan]

And create a sales pipeline that looks like this:

	No of leads	[insert no.]
	Marketing qualified leads ( <i>no. of leads you have spoken to and who demonstrate an interest</i> )	[insert no.]
	Sales qualified leads ( <i>no. of prospects that you have met/called and are now BANT qualified*</i> )	[insert no.]
	No. of SQLs in the contract/negotiation stage	[insert no.]
	No. of clients ( <i>no. of prospects that have agreed to, and signed, your contract</i> )	[insert no.]

\* **NOTE:** BANT qualification means the person you're talking to has a budget, the authority to engage with you, a need, and a timeframe in which to implement a solution.

To achieve CPD success...

[list all the activities you're going to undertake to ensure you continue to improve and ultimate become the best you can be.]

Think about...

- Reading books and blogs.
- Listening to podcasts.
- Registering for webinars.
- Taking online training courses.
- Booking a course, or studying towards a qualification.
- Attending events.
- Getting involved in social media to join in the conversation – you will learn a lot from your peers.
- Becoming a member of your industry's institutions.

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## The tactics

### Marketing tactics...

[list all the activities you're going to undertake to build your pipeline, and include details, links, or other useful information that will be useful to helping you execute them]

**NOTE:** never feel like you have to do everything. Only choose to engage the activities that you know give you the best chance of success, and that you have the time/money to invest into executing them well.

Think about...

- Personal network
- Events
- Direct
- Website
- Social media
- Content
- PR
- Advertising
- Awards

## The execution

### Schedule of activities...

#### Sales success

**NOTE:** plot your marketing tactics on a calendar like the grid below so you know what needs doing and when. This will help you to allocate the appropriate time and resource to each activity, and ensure your own promotional efforts are given equal importance to client deliverables.

	Wk. 1	Wk. 2	Wk. 3	Wk. 4	Wk. 5	Wk. 6	Wk. 7	Wk. 8	Wk. 9	Wk. 10	Wk. 11	Wk. 12
<b>Personal network</b>												
Activity 1												
Activity 2												
<b>Events</b>												
Activity 1												
Activity 2												
<b>Direct</b>												
Activity 1												
Activity 2												
<b>Website</b>												
Activity 1												
Activity 2												
<b>Social media</b>												
Activity 1												
Activity 2												
<b>Content</b>												
Activity 1												
Activity 2												
<b>PR</b>												
Activity 1												
Activity 2												
<b>Advertising</b>												
Activity 1												
Activity 2												
<b>Awards</b>												
Activity 1												
Activity 2												

**Tip!** There are fancy software tools out there that will help you (some free, some paid for), but a spreadsheet works really well.

## CPD success

	Wk. 1	Wk. 2	Wk. 3	Wk. 4	Wk. 5	Wk. 6	Wk. 7	Wk. 8	Wk. 9	Wk. 10	Wk. 11	Wk. 12
<b>Events/training</b>												
Activity 1												
Activity 2												
<b>Social media</b>												
Activity 1												
Activity 2												
<b>Content</b>												
Activity 1												
Activity 2												

**Tip!** *plot a separate spreadsheet for your CPD activities, print it out and pin it on the wall next to your desk – that way it always stays front of mind.*