

# Marketing Strategy & Plan

## Research

### Client Profile

What type of client firm is ideal? Who are your top 20 targets? What challenges are they facing? Industry trends? Industry challenges (future & now)? Ideal type of company? Maturity? Size? Aligned services? Geography? Weaknesses, Opportunities, Threats? Competitive landscape? What creates success in this industry? What do the top 5% do?

### Buyer Profile

Who is your 'best' buyer? What is their role? What is their budget? What are their needs? What challenges do they have? What opportunities and threats do they have? What language do they use? Where do they hangout? What groups do they join? How do they perceive you? What is their purchase decision based upon? What do they read?

### You vs. Competition

What are your unique strengths and assets? Who is your competition? What do they sell? What are their strengths & weaknesses? What are their price points? What is their UVP? What do they NOT do?

## Strategise

### Marketing Strategy

Niche positioning? Unique Value Proposition? Brand & Messaging? Strategy for service/market development (include cross-sell & up-sell). How will you demonstrate expertise? What are your thought leadership themes? Target awards, prizes & league tables? Target price point.

### Services & Pricing

What services will you offer/change/develop? What value will they provide? What is the target pricing, and revenues? Move to project or value pricing? What is the cross-sell and up-sell? What is your free lead-generation offer? What is your foot-in-the-door offer? What is your repeat business offer? What is your retainer offer? What offer breaks the time-money link? What is your scoping / exploration offer? What are your gold, silver and bronze offers? What are your swaps for negotiation?

### Channels

What are your content priorities for your thought leadership & marketing (e.g. white papers, videos, research reports, interviews, benchmarking; books )? What are your aims for these (free to everyone? Email capture? Conversation starter)? What are your online / offline channel priorities (e.g. blog; YouTube; LinkedIn; conferences; webinars; podcast; Twitter; Facebook; mail; Email newsletter; conferences; )? Which of these can be automated from one piece of content?

## Plan

### CSFs & KPIs

What are your primary and secondary measures? Client delight? Impact? Marketing ROI? Sales & service revenues? Sales & service margins? Leads: warm & hot? Pipeline measures? Lead / CRM activity? Client churn? Testimonials & referrals? Lead conversion? Engagement with content?

### Resources

Budget for marketing? Budget for experimentation? Resources for thought leadership & research? Utilisation for sales? Reward for sales? What competencies will you keep in house & which to outsource? Training needs for marketing & sales?

### Activities

Content creation (incl. thought leadership & research) process & plan? CRM process & plan for cold / warm / hot? Digital re-use process? Digital publishing plan? KPI review timetable? Website improvement plan? Testimonial & referral capture process? Marketing strategy review timetable? Farming plan? Hunting plan? Service development plan?