



## CREATING A GOOD MARKETING PLAN

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One of the barriers to profitability is inconsistent marketing. I am surprised by how many consulting practices do not have a written marketing plan. One of the biggest challenges facing consulting organizations is the “feast and famine” cycle resulting from inconsistent marketing efforts. The primary goal of a marketing plan is to keep your pool of qualified leads at the appropriate level. When the leads pool is full then your sales plan will help provide your consulting staff with consistent billable work to do.

Marketing plans will vary in depth and breadth between different organizations. Some plans are written at the 10,000-foot level and do a good job of identifying the big picture while other plans are written at the ground level and present week-to-week activities in an understandable manner. While the detail within a plan might be subject to personal preference, all marketing plans should touch on the following components:

**Executive Summary.** A 10,000-foot view of the marketing plan along with high level goals, opportunities and challenges. This section should also identify the services and solutions you will provide. This section should normally be less than one page and should identify the flow of information within the marketing plan.

**Marketing Standards (Principles).** The marketing principles that everyone in the firm will adhere to. Principles such as honesty, clarity of message, adherence to the standardized marketing procedures established for the practice, speaking positively about competitors, etc., would all be covered in this section of the plan.

**Geographic Region.** The physical area where you will focus your marketing efforts. This section must address the ability to be responsive to customer needs and/or the technology necessary to provide quality services remotely.

**Targeted Clients.** The size (e.g., gross revenue, number of employees, etc.) and level (e.g., A-Level, B-Level, etc.) of clients who are primary prospects for the services and solutions being offered. This area will obviously need to tie closely with the discussion about the “Geographic Region” discussion in the plan. You should identify the characteristics of the clients you most want to serve. You should also identify the screening process you are willing to follow to find these clients.

**Competition.** This section of the plan covers both of the following forms of competition: 1) those individuals and organizations who are offering similar solutions to your targeted clients in the same geographic region, and 2) those products that offer similar functionality to the products/tools you represent. To be successful in marketing, you must have a clear understanding of your position in the market and your calculated strategy to position yourself as the preferred consulting solution to your targeted clients.

**Risks and Barriers.** The list of internal and external risks and barriers that potentially stand in the way of your desired success. Examples might include limited capacity, poor track record for success, lack of partner support, excessive travel for consultants, level of competition, volume of qualified prospects, etc.

**Marketing Message.** Identify the marketing message that will give you a competitive advantage with your prospective clients and set you apart from your competitors. A marketing message is basically what you say when you are in front of each new prospective client. It stands to reason that a better message will lead to greater results.

**Marketing Methods.** The activities you plan to pursue to find prospective clients. These activities might include seminars, tradeshow, direct mail, etc. For each marketing method, you should detail your standardized approach to identifying qualified prospects and the things you are committed to do to gain an advantage over your competitors.

**Monitoring and Reporting.** Identify how you will monitor and report the results of your various marketing activities. The purpose of monitoring is to develop a track record of your most successful activities. Again, this is where standardization plays such a vital role. Without standardization, you will be unable to effectively monitor the “cause and effect” relationship of your activities. Standardized report forms should be developed to transfer pertinent information to management and consultants.

**Objectives/Goals.** Quantifiable goals for things such as quantity and quality of leads in the leads pool, monthly software sales, number of new clients each month, software manufacturer’s awards level, etc.

**Strategic Partners.** The individuals and organizations who are in a position to help you reach your marketing goals and a description of how you plan to work with them to create win/win opportunities for your mutual organizations.

**Budget.** Identify the costs associated with executing your marketing plan. This section should be formatted to show the key assumptions upon which your costs are based. You will want to evaluate “co-op” dollars available from the software publisher, the rules associated with the use of these funds, and build this revenue source into your marketing plan.

**Action Plan.** A list of specific tasks along with the responsible person(s) and timeline. An action plan typically covers three to six months of activities and is updated regularly to keep the actions fresh and in relation to the market place. A spreadsheet or other calendaring software used as an attachment to the marketing plan narrative is the best approach to making this a usable part of the document. Once you’ve honed your plan, this section will become your focus for future changes.

## **Conclusion**

A marketing plan can help you focus your marketing efforts in areas where they will achieve the greatest results. If you are not currently using a marketing plan, I would

encourage you to invest the time to create one. Don't worry so much about the look and feel of the plan as you create it . . . rather focus on addressing these key components. The more you use your plan, the greater the success in your practice. Although a good marketing plan should take a minimum of 50 hours to create, the results can be tremendous as you follow this roadmap to greater success.

At Upstream NorthWest, we have a Blueprint for Excellence Process for helping organizations develop an effective marketing plan. Please give us a call to discuss how this process may benefit your organization.