

# A Marketing Plan That Works!

Who are you talking to and what are you saying



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The part of my business that I enjoy most is offering customized business coaching services to new and long-time info-entrepreneurs. You can see more info on this at [BatesInfo.com/coaching](http://BatesInfo.com/coaching), or just email me ([mbates@BatesInfo.com](mailto:mbates@BatesInfo.com)) and ask for my coaching FAQ letter.

I've also written a whole book about the info-entrepreneur profession - [\*Building and Running a Successful Research Business: a guide for the independent information professional\*](#). The second edition, published in 2010, is available through my [Bates InfoStore](#). *I include half an hour of my business coaching services when you purchase the book directly from me.*

I welcome any comments or questions you have regarding the material in this eTool.

*Mary Ellen*

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## A Marketing Plan That Works!

When you start your business, you may write a business plan. And, as useful as a business plan can be, you will be spending most of your time and energy on your marketing plan, particularly during your first few years. Similar to a business plan, your marketing plan is a living document. You write your first one when you start your business, with certain assumptions and hunches. Over time, your business changes, your client base evolves, the information environment morphs, and you identify ways you can more effectively use the available media tools to engage with your clients.

*Attract rather than  
chase prospective  
clients*

The approach I have found to be most effective, both in my own practice and with the info-entrepreneurs I coach, is to *attract* rather than *chase* prospective clients. This enables you to leverage your valuable time more effectively, and it eliminates the tire-kickers and looky-loos that you attract with traditional direct-mail and advertisement-based marketing.

The focus of this approach is on *engaging with* your clients, not talking to them. Look for ways to touch as many of the most likely prospects as you can with each marketing effort. And, since we info-entrepreneurs have a limited supply of time, be mindful of how you can get multiple uses out of each marketing effort you make. Blog posts can become the nucleus of a presentation you give. Attend a conference and blog or tweet about what you heard. Compile the posts and distribute a white paper to interested clients. You get the idea... Look at every piece of content you produce as you market, and consider how else you can use that content.

### *What's your goal?*

It is hard to know if you have arrived somewhere if you did not have a destination in mind. Likewise, you need business goals for the year that will guide your marketing activities and enable you to track the success of various marketing efforts. To achieve your strategic goals for the year, plan backward instead of forward. Often the most effective way to complete a project or solve a problem is to identify what your goal is or what the resolution of an issue would look like, and then figure out how to get from here to there.

The key element is to let your goals drive your strategies and actions. Unless you know the purpose of each marketing goal, you cannot develop a strategy to achieve that goal.

Setting your marketing goals, like establishing strategic goals for your business, requires controlled enthusiasm – you don't want to set your goals so low that you are holding back your business, nor do you want to set goals that are unrealistically high and only serve to discourage you.

## *Who Are Your Clients?*

Before you can start marketing yourself, you have to know who you're talking to. Are your potential clients the marketing execs in the healthcare technology industry? Advertising agencies? Non-profits? Intellectual-property lawyers?

It is sometimes tempting to say that you provide any service to anybody, but you know that you can't truly offer the high-value your clients will pay you for in every possible type of project. You know the biotech industry, or you specialize in primary research for competitive intelligence, or you provide consulting services related to enterprise knowledge management. You can't do all of those things at a level your clients would value.

*Build your business  
around your  
clients' needs, not  
around what you  
think they want,  
or what you know  
how to do.*

Your own client base will be different from anyone else's – you bring your unique set of skills and expertise, you have your own professional network of colleagues, and you know what kinds of clients

you want to work with. I cannot tell you who *your* clients are, but below are some thoughts to help you identify your prospective client base.

Build your business around your clients' needs, not around what you think they want, or what you think you know how to do. If that means building new skill sets to meet the needs of those clients, then that can be one of your New Year's resolutions. But once you build a client-driven business, you'll have clients for life, because you will have become competition-proof.

## *What Does A Marketing Plan Look Like?*

While the specific format does not matter, it is important that you design a marketing plan that enables you to see both your strategic goals for the year *and* your week-to-week activities. You will be consulting this plan at least once a month, and you may have to modify your plan as the year progresses, so it needs to be organized in a way that works for you.

You will also always be working on several marketing efforts simultaneously. Some of your efforts may be done within a month or two, and some will be on-going. Remember the marketing axiom that a potential buyer has to be exposed to your “brand” at least seven times before the buyer remembers you. Develop a marketing plan that includes as many of these media as possible:

- e-newsletter
- blog
- Twitter
- Facebook / LinkedIn
- article(s) in publications that your clients read
- speaking in front of your prospective clients
- hard-copy postcards (as follow-up only; see section below on direct mail)
- face-to-face networking events with likely prospects (not just the Chamber of Commerce)
- member-facing volunteer position with professional association

Your first step in writing your business plan is to describe your client base. While you don't want to define yourself too narrowly, you want to be able to market effectively to as many of your prospective clients as possible. Ways to define your market include

- industry
- job title
- job function / role
- high value placed on your services

You may not use all of these aspects to describe your clients, but having prospects with several elements in common makes it easier to get the most impact for your marketing efforts and to “touch” simultaneously as many people as possible. Figure 1 has a set of statements about your clients, that will help you articulate who your market is.

Next, you need some measurable goals that you can plan around. Figure 1 also has a series of statements that will guide you through establishing some ways to track your marketing success over the course of a year.

Once you have established your goals, sit back and think about what strategies you will take to meet each one. Keep in mind that you may need to take several different approaches in order to meet a goal.

Figures 2-1 and 2-2 are different ways of looking at a marketing plan. Figure 2-1, which I tongue-in-cheek call Marketing Plan For Left-Brained People, is designed as a Word table, with each strategy and specific action steps spelled out, along with a rough timetable of when I expect to get each step finished. Figure 2-2, the same plan but designed for people who like a more organic approach, shows how to look at your plan as a mind map. Either approach is fine; choose a structure that lets you keep track of your ultimate goals, the strategies and specific steps required to achieve those goals and your timeline for when you will finish each of your action steps.

In the example below, one of my goals is to three CI clients in the consumer products industry. One of the ways I will meet that goal is by establishing my reputation as expert. I will build my reputation among my core client group by becoming active in an association my clients belong to. That requires three steps - to identify potential associations, research each one to identify volunteer opportunities, and then contact the chair or president of the association to offer my volunteer services in a specific area that will get my name out to members and demonstrate my value.

My second strategic approach to getting three CI clients in the consumer products industry is to build my social network. There are three actions I can take, which can be done simultaneously and throughout the year. Use Figures 2-1 and 2-2 to develop your own marketing plan that reflects how you plan and carry out strategic activities.



**Figure 1: Marketing Plan Goals**

**Who are my clients?**

My clients:

work in the \_\_\_\_\_ industry.  
often have the words \_\_\_\_\_ in their job titles.  
are responsible for \_\_\_\_\_  
within their organizations.  
would pay me at least \$150/hour to provide \_\_\_\_\_  
\_\_\_\_\_.

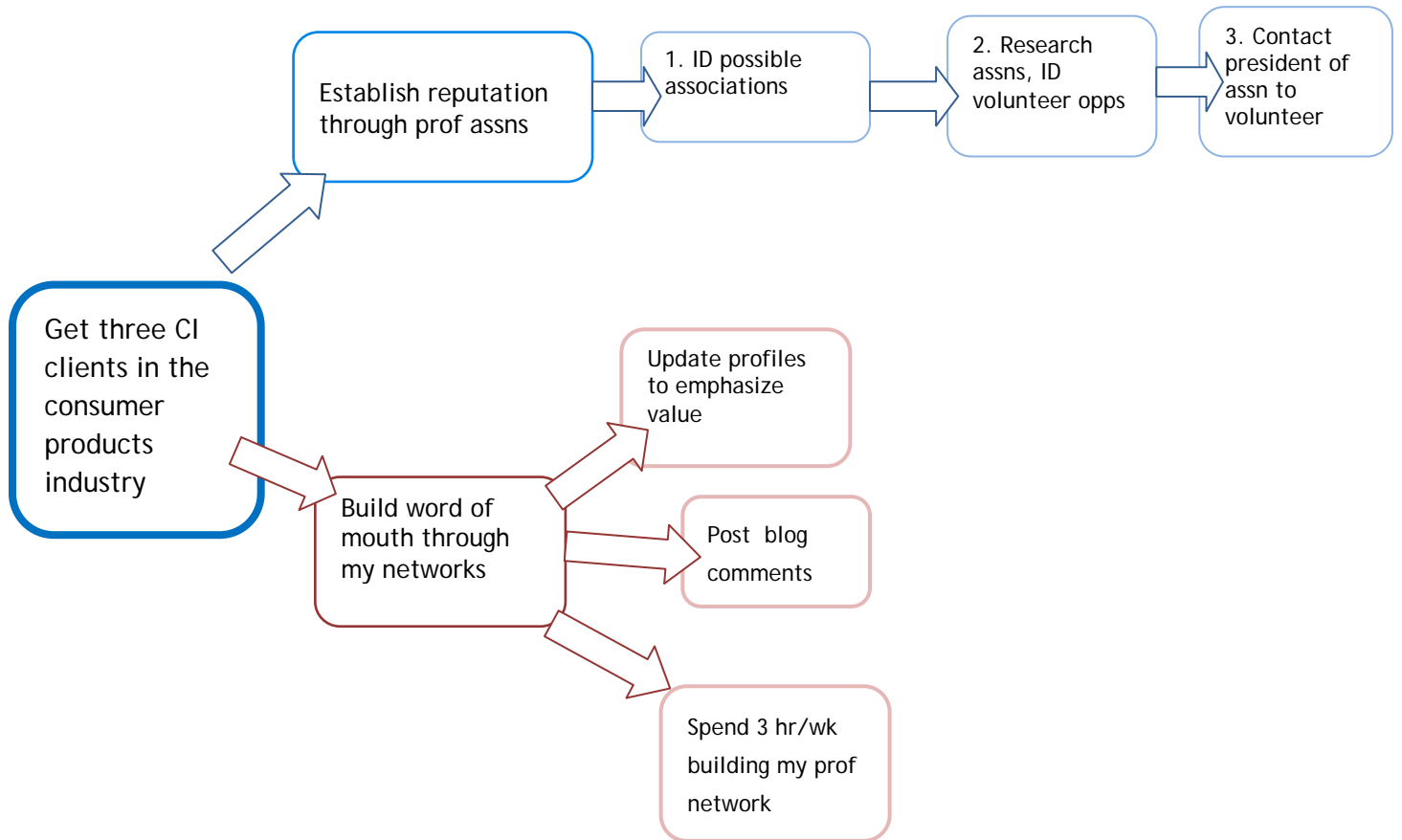
**What are my measurable goals?**

- My business will *net* (after expenses) \$\_\_\_\_\_ this year.
- I will have \_\_\_\_\_ active clients within 12 months.
- I will develop at least \_\_\_\_\_ prospects.
- I will develop \_\_\_\_\_ different tools/media for contacting prospects regularly.
- I will give at least \_\_\_\_\_ presentation(s) to likely prospects.
- I will develop one new information product or service this year.

Figure 2-1: Marketing Plan Template for Left-Brained People

Goal	Strategy	Actions	Time frame
Get three CI clients in the consumer products industry	Establish reputation by getting active in my clients' professional associations	1. ID possible associations	1Q
		2. Research associations, ID volunteer opps	1Q
		3. Contact president of assn to volunteer	2Q
Get three CI clients in the consumer products industry	Build word of mouth through my networks	Update my social network profiles to emphasize value	1Q
		ID relevant blogs my clients read, and post comments as appropriate	all year
		Spend three hours/week building my professional network in Facebook and LinkedIn	all year

Figure 2-2: Marketing Plan Template for Right-Brained People



## *What doesn't work*

The goal of marketing is to get people to come to you rather than to have you out looking for prospects. This is why cold calling virtually never works for our type of business; people generally aren't willing to make a critical business decision based on research done by someone they don't know or trust.

Likewise, direct mail to people who don't already recognize your name and know your reputation for excellence doesn't work – at least not as a primary means of getting clients. Think about it... If you needed a doctor to treat your child's epilepsy, would you go to someone who had just sent you a postcard or brochure? No, you would rely on recommendations from your physician; you would conduct research to find the experts in the field; or you would consult with a patient advocacy group. In other words, you – the client – would look for the best person with the expertise you need.

I believe that, 99% of the time, direct marketing is a waste of time, energy and money. The 1% of the time that direct marketing does work is when you have identified a list of people, all of whom need *exactly* what you offer, and you are committed to sending out monthly mailings for at least six months. Given that you are still lucky if you get a 3% response rate, this is a big gamble for most info-entrepreneurs. Of course, this is not the same as sending promotional material to people with whom you have already established a connection. Focus on building your own prospect list, and send a postcard to them at least once every month or two.

As for cold calling, see my free eTool, "Friends Don't Let Friends Cold-Call" at [BatesInfo.com/store](http://BatesInfo.com/store) for my thoughts.



## *About Mary Ellen Bates*

Mary Ellen Bates is the owner of Bates Information Services, providing strategic business research to business professionals, and consulting and training services to the information industry. She provides half- and full-day workshops on effective online research and other topics related to knowledge work.

Mary Ellen offers strategic coaching services to new and long-time information entrepreneurs and other info pros. She offers both a strategic perspective and a practical approach to helping you create a business that you love and that is profitable. See more information about her coaching services at [BatesInfo.com/coaching](http://BatesInfo.com/coaching).

Mary Ellen is a frequent keynote speaker, and is the author of seven books and innumerable articles on the information industry. Her latest book, the second edition of **Building and Running a Successful Research Business**, is available at [BatesInfo.com/store](http://BatesInfo.com/store).

Mary Ellen offers two free email monthly newsletters:  
"Bates InfoTip" ([BatesInfo.com/tips](http://BatesInfo.com/tips)) and  
"Info-Entrepreneur Tip of the Month" ([BatesInfo.com/ie-tips](http://BatesInfo.com/ie-tips))

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