

# E Komo Mai

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- We Will Be Talking About Your Marketing Goals and Tactics Today. As you get Settled, Please Take a Minute to Think about Examples You Can Share with the Group. Feel Free to Talk Amongst Yourselves...



# How to Write a ~~Great~~ Very Good Marketing Plan

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*July 25, 2012*



# Why Do a Marketing Plan At All?

- ✱ Determines Budget & Staffing Needed (SYSTEMS)
- ✱ Set Goals, Strategies, Create Tactics (ACTION PLAN)
- ✱ Examine what's working and not working, fix it, discard it, or double down (FEEDBACK & MONITORING)
- ✱ Create a sense of common purpose and goals - even for non-marketing professionals: MARKETING IS NOT A DEPARTMENT
- ✱ Prevents the roller-coaster effect - and knee-jerk marketing programs
- ✱ Gives professionalism and credibility to marketing role

# Step 1: Existing Mission Statements & Values

- ✱ If you have a Mission Statement, Vision Statement, Core Values, great. Build on them.
- ✱ If you do not have a Mission Statement, Vision Statement, Core Values, etc... Do not get hung up!



# Step 2: Assessment

- ✱ 1. Internal Analysis of Company Financials (SWOT, 80/20, Segmentation)
- ✱ 2. Industry Research - IBIS World
- ✱ 3. Market Research - Reference USA
- ✱ 4. Other Research - Housing Starts, Building Permits, Legislation, etc...

# Step 3: Segmentation

- ✱ Practice Groups, Industry Groups, Work Groups, Geographic Groups
- ✱ SubSpecialties
- ✱ Individuals



# Step 4: Set Goals

- ✱ Examples:
  - ✱ Improve Customer Service
  - ✱ Diversify into New Markets
  - ✱ Build the Company's Reputation in xxx
  - ✱ Increase Online Inquiries

# Step 5: Set Tactics

- ✱ Improve Cross Selling by holding monthly meetings of appropriate groups
- ✱ Rewrite your website and use SEO guidelines to improve your ranking
- ✱ Write a “white paper” for distribution on your website
- ✱ Create an App for some clever aspect of your company’s business



# Step 6: Get it on Paper

- ✱ Format is not important - a 1-page plan may be your best friend
- ✱ Lots of graphs and research are essential for you to know, but not necessary to communicate to everyone
- ✱ THE PROCESS IS MORE IMPORTANT THAN THE FORMAT
- ✱ If you need a kick-start, hiring a professional is not a sign of weakness

# Perfection Fallacy

- \* Very Good
- \* Good
- \* Great
- \* Not so Good
- \* Truly god-awful



# Selling The Invisible

In the words of marketing maven Joan Capelin, of Capelin Communications in New York City:

“Marketing is one way a firm can consistently think about its future: What you want to do, for whom, where you want to do it, what kind of fee you can command, what standards you want to adhere to. Marketing is far more than an activity; it is an orientation. Architecture. Education. Communication. Business. Service. Marketing. Added together they equal Survival.”

# 10 Marketing Ideas

- ✱ 1. Encourage every professional to keep his/her own contact list of clients, complete with personal notes
- ✱ 2. Encourage every professional to become active in at least 2 organizations - 1 business, 1 whatever
- ✱ 3. Have someone call your references and see what they say about you and your company
- ✱ 4. Take your hesitant public speakers to a Toastmasters Meeting
- ✱ 5. Send handwritten thank-you notes to each client after engagement



# 10 Marketing Ideas

- ✱ 6. Brainstorm creative ways to communication with clients between projects
- ✱ 7. Make a short video of your professionals for your website
- ✱ 8. Adopt a charity, or develop a long-term charitable giving plan
- ✱ 9. Do an annual “Practice Management” half-day seminar to help solo practitioners in your firm’s field
- ✱ 10. Create and Link special project pages on your website with your clients’ websites