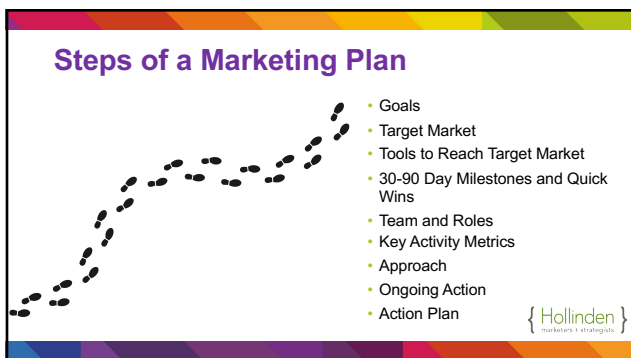




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Goals

- Start with key revenue goals.
 - Overall growth goals
 - Organizational goals
 - Targeting goals
 - Other goals
- These priorities help set the context for the rest of the marketing plan.



{ Hollinden }

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Filling the Funnel



Step 1: Desired Revenue: \$ _____ %

Step 2: Average Deal Size: \$ _____ %

Step 3: Step 1/ Step 2 = # of Deals Needed: _____ %

Step 4: Close Ratio: _____ %

Step 5: Step 3/ Step 4 = Targets: _____ %

{ Hollinden }

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Target Market



- Who is your target audience?
- Type of current clients
- Optimal client
- Be descriptive
 - Industry
 - Geographic Location
 - Revenue Size
 - Age
 - Gender
 - Psychographics

{ Hollinden }

6

How to Identify Your Target Market


- Analyze your service
- Understand the competition
- Choose segmentation criteria
- Research
- Create personas



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Buyer Persona

- Semi-fictional, based on research and real data
- Consider:
 - Demographics
 - Behavior
 - Motivation
 - Goals



Key Decision Maker

About Larry
Age: 34
Education Level: BBA Management, BBA Accounting, Texas A&M University
City: Houston, Texas
Hobbies: Golfing, Cooking, Wine Collecting

Larry wants

- Clear, linear communication
- Well-defined processes
- Coordination between business development efforts and R&D
- A defined business plan that helps guide the company for the year

Larry Jones
CEO
ACME Manufacturing

Business development is at the forefront of my mind, and I am always looking for ways to efficiently turn prospects into clients.

Goal
My goal is to run my company effectively, while fostering an environment of business development within my team and push my employees to continue to build their skills.



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Marketing Toolbox



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30-90 Day Milestones and Quick Wins

- List milestones and quick wins you will achieve within a 30-90 day period.
- Use 30-60-90 day sprints.
- What exactly will you achieve and by when?
 - Be specific and time-bound.



{ Hollinden }

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Team and Roles

- List the individuals at your firm who are directly or indirectly going to be involved in accomplishing goals.
- Roles may differ by firm size.
 - For example, at a smaller firm one individual may fill more than one role at a time, while at a large firm each role may be assigned to a specific individual.



{ Hollinden }

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Key Activity Metrics

- List the key activity metrics that will help you reach your goals.
- Start from your goals and work backwards.
- For example: To produce 1 retainer deal, it is typical to have:
 - Targeted at least 60 leads
 - Run 10-12 exploratory calls
 - Run 4 goal setting/planning calls
 - Run 2 final presentations
- Metrics may vary from firm to firm depending on your market, resources and tactics.



{ Hollinden }

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Approach

- List your approach to reaching your revenue and quarterly goals.
- Describe specific areas on which you'll focus.
 - Target selling
 - Lead generation
 - Speaking
 - Improving your process
 - Hiring
 - Training
- Describe how you plan on improving your areas of focus.



{ Hollinden }

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Ongoing Action

- Write down how you plan to keep your marketing plan going.
- Describe your plan to get clients to resign their retainer agreement and stay with your firm.
 - Understand client needs
 - Set expectations and deliverables
 - Do not overpromise
 - Build relationships with multiple employees within the firm

{ Hollinden }

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Ongoing Action, cont.


- Describe how your firm plans to obtain referrals.
 - Leverage LinkedIn
 - Look for opportunities for a positive response
 - Provide a template
 - Act on positive feedback
 - Distribute your content and resources through appropriate channels
 - Offer incentives
 - Create different avenues for advocacy
 - Align your firm with your customers' values
 - Exceed expectations
 - Network

{ Hollinden }

15

Action Plan

- Write down the specific actions you plan to take in order to achieve your goals.
- Make your actions SMART.
 - Specific
 - Measurable
 - Attainable
 - Relevant
 - Time-bound
- Include a timeframe for completion.
- Be strategic and tactical in making your action plan.



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Questions?



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