



Marketing Plan Outline

Part I: Financial and Logistics

goal

- How much income do you want to generate each month?

billing/time management assumptions

- How much work can you really handle?
- How many hours each day/week?
- How many hours for each type of task?

client/time management assumptions

- What is your ideal mix of clients in financial terms?
- What kinds of clients drain more than they pay?
- What clients might need to transition up or out?

rates

	item	standard price	discounted price
Time-based			
Offering-based			

current clients

client	category	fee	corresponding time	type	contract end

gap analysis and risk summary

- What could stand in your way between being where you are and where you would like to be?
 - Obstacles you create.
 - Obstacles created by current clients (typically those who do not match your ideal profile).
 - Obstacles completely beyond your control.

Part II: Targets, Themes and Strategies

targets

1. Target 1

- Size/Net worth/Career level
- Field
- Description of occupation
- What they need
- Observation
- Point of contact: who you need to talk to
- Offering: what do you want them to buy from you?

2. Targets 2–5

themes

- What are you going to emphasize that your prospects will “get”?

strategies and tactics

underlying strategic assumption

- Your main drivers of business (e.g., Internet, referrals, press notices, etc.)

tactics

adopted

- What activities are you committed to?

skeptical

- What activities are you curious about with reservations?

rejected

- What activities have you rejected outright?

benchmarks and critical success factors for adopted tactics

tactic 1

- How many touches?
- Available resources?
- Considerations?

tactics 2–5 (repeat steps for tactic 1)



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