

Marketing Planning Template

REFERME IQTM

Automated Referral Intelligence



Step 1: Establish your “Baseline”

Get clear on your values, purpose, “ideal” clients/customers, and current status of your marketing programs.

- 1. My top values:** _____
(Examples: integrity, family, independence, relationships, servitude, fitness, health, spirituality, action, movement, environment, achievement, freedom, legacy, etc.)
- 2. The purpose of my business is to:** _____
(Examples: Prepare my clients for the certainty of uncertainty. Help my clients feel financially confident. Help my patients take good care of their health. Help my customers with their home improvement needs.)
- 3. My ideal client(s)/customers is/are:** _____
(Life stage/Age/Gender? Family status? Profession? Assets/Net Worth/Income? Core Values? Organizations? Fears? Other?)
- 4. My brand is:** _____
(Your unique story? Brand strengths? How are you and your business different and special? How do you uniquely solve the issues facing your ideal clients/customers? How do your ideal clients/customers talk about you?)
- 5. My current marketing stats:**
of new clients/customers acquired (last 12 months): _____
of “ideal clients/customers” (last 12 months): _____
of leads/clients/customers from each source: _____
Example: Referrals: 22/8 - means you received 22 referral leads and 8 converted to clients

(SOURCES)

Referrals:	_____	Website SEO/conversion:	_____
Events:	_____	Online listings:	_____
Seminars/Webinars:	_____	Lead automation programs:	_____
Advertising/PR:	_____	Social Media:	_____
Radio Show/TV:	_____	Email/target marketing:	_____
Natural Market:	_____	Other:	_____

New client Revenue (12 months) _____
 "Ideal Client" Revenue (12 months) _____
 Current Vital Statistics:
 -*Activity* (# of meetings/contacts per week seen) _____
 -*Conversion* (% conversion to \$) _____
 -*Revenue* (\$ per meeting/contact) _____
 Marketing spend (12 months) _____
 Cost per new client/customer _____

6. SWOT (Based on your goals for last 12 months):

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	

Step 2: Determine your new plan

Get focused on goals, strategies and tactics.

1. Goals – 20__:

- # New clients/customers: _____
- # New “ideal clients/customers”:

- # Leads required:

- Total marketing budget:

- Targeted cost per new client or
customer acquired:

2. Rank your top 5 marketing strategies:

- | | |
|-------------------------------|--|
| _____ Referrals (traditional) | _____ Social Media |
| _____ Referrals Automation | _____ Website SEO |
| _____ Events | _____ Online Listings |
| _____ Seminars/Webinars | _____ Content Marketing (blog, newsletter) |
| _____ COIs | _____ Email/Target Marketing |
| _____ Advertising/PR | _____ Natural Market |
| _____ Radio Show/TV | _____ Other: _____ |

3. Tactics (specific actions required for each strategy):

#1 Strategy:

Tactics:

1. _____
2. _____
3. _____

#2 Strategy:

Tactics:

1.

2.

3.

#3 Strategy:

Tactics:

1.

2.

3.

#4 Strategy:

Tactics:

1.

2.

3.

#5 Strategy:

Tactics:

1.

2.

3.

Step 3: Execute

Make sure you have the right roles, processes and proper types of support to achieve your goals.

1. Define key roles and ownership:

Task:

Marketing plan/strategy
Marketing calendar
Content development/copy
Events/Seminars/Webinars
Website/SEO/listings
Social Media
Metrics/tracking
Other: _____
Other: _____

Owner:

2. Checklist of process best practices:

_____ Tracking vs. goals
_____ Quarterly Marketing Calendar
_____ Automated Referral System
_____ Media kit
_____ CRM updated weekly
_____ Other: _____

_____ Weekly marketing meetings
_____ Website analytics (Google)
_____ Weekly blogging
_____ Monthly Profile Management
_____ Social Media/email archiving
_____ Other: _____

3. Resource checklist:

_____ Marketing Providers
_____ Marketing Budget
_____ PR Firm
_____ Tracking System
_____ Staff Training
_____ Other: _____

_____ Referral Automation Provider
_____ CRM Provider
_____ Archiving Provider
_____ Google Analytics
_____ Coaching/Accountability
_____ Other: _____