



...AND THE CLIENTS WENT WILD!

How savvy professionals
win all the business they want

The Marketing Action Plan:

**YOUR PLAYBOOK FOR
WINNING ALL OF THE
BUSINESS YOU WANT!**

Maribeth Kuzmeski, MBA
Red Zone Marketing, Inc.

A COMPLETE MARKETING PLAN TEMPLATE
FOR ATTRACTING YOUR BEST CLIENTS

Copyright © Red Zone Marketing, INC.

Red Zone Publishing
100 S. Atkinson Road, Suite 116
Grayslake, IL 60030
(847) 367-4066
(847) 367-4107 (fax)
info@redzonemarketing.com
www.redzonemarketing.com

ALL RIGHTS RESERVED, including the right to reproduce this book or portions thereof in any form whatsoever.

contents

Part I: Goals	1
Part II: Principles, Strategy, and Tactics	6
Part III: Master Marketing Action Plan Sheets	54
Part IV: Notes	60

Firms that implement marketing successfully and consistently start with a plan. Large companies typically require extensive and detailed marketing plans, and small companies often have something less formal. But no matter the plan's complexity, in order for it to garner results, it needs to be 1. Thoughtfully Designed; 2. Written Down Somewhere; 3. Action Oriented (with dates and people assigned to tasks); 4. Implemented; and 5. Reviewed monthly with performance monitoring.

Having a long term plan with goals and financing, alliances and vision is appropriate; however, a typical marketing plan should include one year of strategy and activities. For small businesses, a one year timeframe is often the best period to plan marketing. While some items may extend beyond or be achieved after one year, it can be a waste of time to plan in detail for three or five years of marketing activities in a flexible and sometimes fast moving small firm.

A Marketing Plan is designed for your marketing staff to implement; but it also provides direction and confidence to company leadership and the staff. Share your plan with the entire organization so that others can understand your activities and the growth that is on the horizon.

This book provides a complete formula and template for building out your marketing plan using forms and valuable exercises. At the end of this book you will find an Action Plan template for you to record all of your marketing actions, dates and people responsible for implementation in one place. Follow this template from beginning to end, focusing especially on the tactical areas that apply to your business.



The Marketing Formula

Your Playbook for Winning All The Business You Want!

Part I: Goals

List the successes you had in _____ (previous planning year)



Accomplishments

- _____
- _____
- _____
- _____
- _____

Actions that lead to the successes:

- _____
- _____
- _____
- _____

Where am I?

Conduct a complete assessment of your situation by asking yourself the following questions:

- How much growth have I had -- in terms of both income and number of clients -- in the past year?

- Over the past three years?

- How have I obtained most of my clients to date?

- Which marketing strategies have worked well for me?

- Which ones haven't?

- How long have I had my typical client?

- What's my average revenue per client?

- What readily identifiable "niche", if any, do my clients fall into?

- What system, if any, do I have to ensure a steady flow of referrals?

- What changes do I need to make in the way I do business to be successful?

Set your Goals:

1. _____

2. _____

3. _____

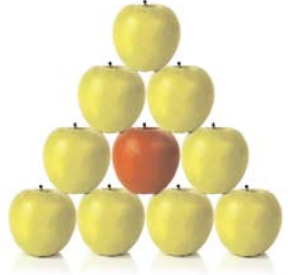
4. _____

5. _____

- 6. Revenue of the Business: _____
- 7. Number of New Clients/Customers: _____
- 8. Yearly Value of New Clients/Customers: _____
- 9. Number of New Prospects: _____
- 10. Number of Appointments Per Week: _____

Part II: Principles, Strategy and Tactics

1st Principle -- What Are YOU Doing that No One Else is Doing? *Build Client Delight Through Your Differentiation*



What do people dislike most about your industry, service, or product offering? (i.e., the bathrooms at gas stations)

Can you offer a solution to what people dislike most?

What can you provide that is truly different?

List an offering you could make that would surprise (and maybe even go viral)!

What is a "Freemium" You Could Offer?

What Could You Provide That No One Else Has Taken To Market?

Can You Create a Whole New Category?

What Are You Selling That You Could Promote in a Unique Way?

2nd Principle -- Focus Your Marketing on Benefits, Results and a Call to Action: *What's Really In It For Them*

What do Your Best Clients Want? What Results Do They CARE About?

List the ways in which you currently promote your products and services.

Product or Service	Feature	Compelling Benefit

Conduct a Message Strategy Session

Before you do any marketing, conduct your own Message Strategy Session with your team by asking one another the following question:

1. What is the **challenge** our product or service overcomes?

2. What are the words our clients are using to describe **their challenge**?

3. What is our **solution** (using words they will relate to)?



4. What are the specific **benefits** of our product or service?

5. List your benefits with **clear messaging** for each targeted prospect.

List Your Most Effective Calls to Action (and future one's too)!



What Will Get Your Clients Going Wild?

2nd Principle Summary: *List your product or services best benefit, compelling message and call to action to buy.*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____

3rd Principle -- Go Viral! *Create Memorable and Valuable Information Worthy of a Pass-Along*

Consider what may be an “idea virus” in your business. List potential ideas that could have the power to spread from person to person to person.

List Possible Affiliates That Would Be Interested In Your Message

Does your idea meet the four contagion factors? How?

1. Strength of The Message:

2. Size of The Population of Opportunity:

3. Potential Number of Days During the Message will be Contagious:

4. Number of People Message Carriers Have in Their Network:



3rd Principle Summary: What viral campaigns can I create? List the idea, message and how it could be distributed.

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____

4th Principle- Leverage Your Business Network for Incremental Growth:
Find and Cultivate Centers of Influence to Move Your Message Fast

Powerful Connections List

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____



10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

Continue to 100

What are some innovative ways you can target and reach your potential advocates?

With what specific businesses might you create alliances?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Groups you could join to build your own powerful network:

Charity _____

Church Group _____

Industry Group _____

Alumni Group _____

Rotary or other international organization

EO or other international entrepreneur organization with qualified entry standards



Four Steps to Leverage Your New Business Venture

1. Write out your vision of exactly what you want and need to be successful quickly.

2. Identify those who can connect you to what you most want and need. Search and connect as if you had no money - even if you do. A vision with no money needs great passion to survive.

3. Create a "What's In It For Them" Plan to forge a leveraged relationship. List the reasons why each potential partner would want to work with you on your venture.

4. Begin reaching out in person, through the phone and via email with your prepared plan to create win-win relationships. Get your business off the ground with little to no start-up capital if possible; and keep in mind that the best capital are your connections.
What will you do?



4th Principle Summary: Record your best leveraging strategy action item.

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____

5th Principle- The Critical Importance of Execution in Your Game Plan:
Good Execution is Better than Good Strategy

How much time and effort will you allocate each week to your marketing strategies?

How will you evaluate and review your marketing strategies to ensure effective execution?



5th Principle Summary: What is the *one strategy* you will execute fully and with precision?

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____



Build A Brand Identity On Shoestring Budget: *Spending Time Effectively Can Be Worth More Than Money*

How do you think your clients describe your brand?

The 5 Attributes of a Strong Brand

1. Delivers benefits that the clients want.

What benefits do your clients and prospects want?

2. Consistency in Quality.

What is the quality perception that your clients have? Ask them!

3. Price

What is your pricing strategy in good and not-so-good times?

4. The brand message remains consistent

Is your brand consistent across the board? List all the mediums you have messaging and confirm the brand is projected the same everywhere:

5. The brand encompasses many marketing elements.

How many branding elements do you have (logo, slogan, signage, and packaging), and where do they appear?



What Will Get Your Clients Going Wild?

Branding Summary: *How do I want my brand defined by others?*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____

Find Your Niche: *Corner the Market One Segment at a Time!*

List the specific niches you will target and why.

- _____
- _____
- _____
- _____
- _____



What Will Get Your Clients Going Wild?

Niche Summary: *List your focused activities within each target niche.*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____

Techniques for Creating a Memorable Experience: *Give ‘em Something to Talk About!*

What are the aspects of your business that people will want to talk about it?

How do you regularly keep in touch with your best clients?

List your 20 best clients.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.



What do you want your clients to do?

What are possible deliverable documents that will tell clients what you do?

What service experiences can you/do you offer to your clients?

- ---
- ---
- ---
- ---
- ---
- ---
- ---



What Will Get Your Clients Going Wild?

Client Experience Summary: *What are the experiences you will create for your clients?*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____



Your Best Prospects Come From Referrals - *Scripts and Strategies for Increasing Your Introductions to Others*

Create a “Who We Serve” list of the types of people that are good clients for you, their needs, and how you can help them. Show this list to clients. It is a very effective method for helping the client think of qualified people to refer to you instead of giving the typical response: “I don’t know anyone.”

Who We Serve:

Client Type	Need	Solution
(SAMPLE) Business Owners with Growing or Mature Companies	(SAMPLE) Reduce taxes and protect assets	(SAMPLE) We provide solutions for tax advantages and wealth building techniques specifically for business owners
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

List the strategies we will use to generate referral from new and existing clients:

REFERRALS

List the best referral sources:

- Clients?
- Prospects?
- Employees?
- Colleagues?
- Family and Friends?
- Vendors?
- Business and Professional Associations?
- Social Contacts?

How will we request referrals?

How will we thank those that give referrals?



What Will Get Your Clients Going Wild?

Referral Acquisition Summary: *List your best referral strategy for this year.*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____



My Website is WORKING! *Turn a Bland Site and Your Internet Presence into a Money-Maker*

What benefits do you highlight on your home page?

What video content could you add to your website?

Website Checklist

- Is my site reaching my target audience?
- Are the key elements in my site impactful?
- Are my product and service benefits clearly identified?
- What are the elements that distinguish my company from the competition on the site?
- What are my Calls to Action?



What changes will you make to your website right now?

What changes will you make to your website over the next year?

How will your prospects find your site (SEO)?

What potential affiliates could drive traffic to your website?



What Will Get Your Clients Going Wild?

Website Summary: *What element in my site will stop people in their tracks?*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____




Social Media: Effective Strategies that DON'T Consume all of Your Time


List Interesting and Valuable Content You Could Begin Sharing Online

List Your Priority Mediums for Updates and Follow Up (ie. Facebook, LinkedIn, Twitter, etc)

1. _____

2. _____

3. _____ 

4. _____ 

5. _____

Select Your Brand Management Tracking Tools and Methods (ie. Google Alerts, Technorati, Social Oomph, etc)

1. _____

2. _____

3. _____

Determine the Time You Will Spend Using Social Media

By setting specific days and times to focus on social media, you will be able to add in social media marketing effectively without it taking over your day, or worse, having it get pushed aside for days.

Weekly? (Set Time) _____

--Or--

Daily? (Set Time) _____

--Or--

Multiple Times Daily (Set Times) _____



Social Media Summary: Once a month, review and discuss effectiveness of your Social Media activities.

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____

Email Marketing: Strategies for Successful Email and E-Newsletters

Plan your email newsletter by focusing on: Target, Message, Value and Frequency. Write out your objectives and your plan for reaching them.



Target

Message

Value

Frequency



Email Marketing Summary: *What will get people looking forward to reading your email newsletter?*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____

Traditional Marketing Still Works: *TV and Cable Advertising, Newspaper, and Other Mediums that Still Cause People to Buy*



How will we track the success of our marketing activities?

Who is our advertising target?

Do the demographics of the medium's audience meet our target?

List our impactful message requesting specific and direct action.

Where do our customers live? How can we reach them directly?

What can we do in our regular advertising and promotion using the techniques that make infomercials work?

- 1. Tell a story and show the product in action.

2. Layer it with powerful customer testimonials.

3. Have strong and continuous calls to action.

4. Overcome objections (again and again).

Would an infomercial be an option for your product or service? If so, what is your next step to put it into action?



What Will Get Your Clients Going Wild?

Traditional Marketing Summary: *Create a plan for successful advertising including what we will sell, our compelling message and call to action, and testing and tracking techniques.*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____
__/__/__	_____



Direct Mail: Simple Principles for Gaining Sales from Good Old-Fashioned Mail



A Simple Direct Mail Formula

1. Revenue goal that you want your mailing to produce _____
2. Average sale amount of product/service _____
3. Enter your closing ratio (If 100 customers are interested in the product and 50 end up buying it, your closing ratio is 50%)

4. Estimate your mailing response rate. (Most direct mail campaigns produce a .5% - 2% response). _____

Enter your numbers in the calculation:

Ave Sale _____ x Close Ratio _____ x Response Rate _____ = _____ / Revenue Goal
_____ = # to mail

What design elements will you use to get your message to stand out?

What's Your Offer?

What is Your Target Audience for Your Mailing?

What response vehicle(s) will you have?

How will you test your strategy?

Measure Your Responses

Keep detailed reports on the following data:

- 1. Number of pieces mailed
- 2. Number of responses you received

3. Response source
4. Conversion percentage
5. Income those responses generate
6. Average order
7. Percentage response
8. Cost per order or cost per response
9. Net profit
10. Returns and bad debt



Direct Mail Summary: Plan your next direct mail campaign using the 5 key elements: Design, Message, Target, Response Vehicle, and Strategy Test. When will you start? What are your objectives?

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____

Events and Seminars: *Creating Buzz and Sales through Group Presentations*

How can you reach your clients and target market using events?

What events would people really want to attend?

How do you describe your event in a compelling way so your best clients will want to bring a friend to the event?

Calendar of Public Events/Seminars

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____



What Will Get Your Clients Going Wild?

Events Summary: *Create events that will show your value and get people talking!*

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
//___	_____
//___	_____
//___	_____
//___	_____
//___	_____



Media Methods To Gain Celebrity Status: *Take advantage of hot topics, timely events, and unique twists to attract attention*

What topics can I write about that the media may be interested in? (Make bold statements with bold headlines)

How often will I submit a press release or article to the media?

- Quarterly
- Monthly
- Weekly

What media will I target?



What Will Get Your Clients Going Wild?

Media Methods Summary: Focus on media outlets that could be potentially "Game Changing" if they were exposed to our unique value.

Action Steps (Transfer these to your Master Action Plan at the end of this book)

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____



Part III: Master Marketing Action Plan sheets

Use this worksheet to plan and evaluate your marketing projects.

Marketing Action Worksheet

Project: _____

Objectives: _____

Budget: _____

Target: _____

Marketing Medium(s): _____

General Message: _____

Implementation Timeline:

Date	Action
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____
___/___/___	_____

Marketing Action Plan

COMPLETED	START DATE	COMPLETION DATE DUE	PROJECT	PERSON(S) RESPONSIBLE	BUDGET
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		

Marketing Action Plan

COMPLETED	START DATE	COMPLETION DATE DUE	PROJECT	PERSON(S) RESPONSIBLE	BUDGET
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		

Marketing Action Plan

COMPLETED	START DATE	COMPLETION DATE DUE	PROJECT	PERSON(S) RESPONSIBLE	BUDGET
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		

Marketing Action Plan

COMPLETED	START DATE	COMPLETION DATE DUE	PROJECT	PERSON(S) RESPONSIBLE	BUDGET
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		

Marketing Action Plan

COMPLETED	START DATE	COMPLETION DATE DUE	PROJECT	PERSON(S) RESPONSIBLE	BUDGET
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		
			MARKETING CATEGORY _____		

Part IV: Notes

NOTES

NOTES

NOTES

Red Zone Marketing, INC

100 S. Atkinson Road, Suite 116

Grayslake, IL 60030

847-367-4066

www.redzonemarketing.com

