

Your Guide to Developing Your Personal Marketing Plan 2023

(Print this and use it)

YOUR NAME : _____

AREAS OF PRACTICE: _____
(the fewer, the better)

TARGET AUDIENCE: _____
(the fewer, the better)

Every professional practitioner must write an annual Personal Marketing Plan

1. Get Control Over Your Career

Creating and implementing your “Personal Marketing Plan” enables you to seize control of your career and professional practice. It enables you to attract and retain the type of clients you like, and deal with matters you find challenging and interesting. You will be less dependent on others to feed you with new work.

There are two kinds of professionals in private practice:

- professionals with their own clients, and
- professionals who work for other professionals who have their own clients.

Which would you rather be?

2. You Will Make More Income

“Rainmakers” make more money than others in every professional firm.

You will no doubt have heard of the phrase “Finders, Minders and Grinders.”

Finders take home greater remuneration.

3. You Will Have More Clout in Your Firm

Professionals who bring in new clients and additional business have more power within their practice. They emerge as the practice’s leaders, influencing important decisions about the practice, its policies and procedures, and its future direction.

How Much Time Should You Invest in this?

Implementing your “Personal Marketing Plan” is the key to your success, but it is non-billable time. Partners/Owners need to invest a few minutes a week on this. Effective marketing and business development is not a “start/stop” process. Like farming, it is an on-going process to obtain the optimum crop harvest.

What Types of Things Should You Do?

Partners should visit their top clients at the clients’ place of business each year.

Book lunch once a week with a different client, a prospective client or a referral source.

Join Affilica International (www.AFFILICA.com) to enhance your image to get a head start.

Writing articles for publication in industry magazines is a great booster.

Giving speeches to local trade groups brings you new client enquiries.

Make the Commitment to Yourself

Developing and implementing your “Personal Marketing Plan” is non-billable time. Therein lies your dilemma. Non-billable “marketing time” does not directly make fee invoices. As is widely said, billable hours are for today’s income, but your non-billable time is your investment to determine your future income, your status and your position.

This “Personal Marketing Plan” is effective and well-focused. As the New Year begins, you need to take the time to review this, develop it and commit to its implementation for the year.

If you would like to discuss anything here, please contact us AFFILICA@outLook.com

Your feedback is highly appreciated. Next year, download next year’s version.

YOUR TOP FIVE EXISTING CLIENTS:

(They need not be the biggest fee producers but the ones which provide lucrative, desirable professional work with a strong potential for spin-offs)

	Estimated Fees	Client Name	Description of Work
1			
2			
3			
4			
5			

YOUR "A" LIST

List here 15 key contacts with whom you want to build and enhance your relationships over the next 12 months i.e. existing clients, prospective clients, referral sources and others.

Recommended relationship-building activities including Client Site Visits, Prospective Client Site Visits, ongoing personal contact, send hand-written notes and cuttings of relevant articles, regular meeting dates, invitations to firm-sponsored seminars, entertainment outings to sports and cultural events, holiday cards, small gifts, add to firm's mailing list for periodic newsletter

	Relationship	Name	Organisation	Networking Activity Codes
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

Activity Codes:

- | | |
|---|--|
| G= Golf, FG= Football Game | L/D= Regular Lunch/Dinner |
| CSV= Client Site Visit | HP= Holiday Party |
| HC= holiday card | SG= small gifts |
| RM= regular meeting dates | FS= invitations to Firm-sponsored seminars |
| HW= sent hand-written notes and cuttings of relevant articles | |
| EO= entertainment outings to sports events, cultural events | |
| ML= add to Firm's mailing list for periodic newsletter | |

ORGANISATIONAL INVOLVEMENT

List below the organisations to which you belong,
your current level of involvement and
your goals during the next 12 months.

	Networking organisations	Your current level of involvement	Your goals during the next 12 month
1	Affilica International	Member in your location	<p>Make acquaintance with each Affilica member</p> <p>Refer them my client's out of country enquiries in their location</p> <p>Ask them to refer their client's enquiry for their needs in my location</p>
2	Trade Association		
3	Social Club		
4	LinkedIn electronic social network		
5	Local interest society		

SPEECHES AND SEMINARS

List below the speeches you intend to make, presentations you intend to make and seminars you intend to deliver over the next 12 months.

	Topic	Organisation / Group	Date	Venue
1	Client's success story to attract referral of that type of work	Local Business Group		Business Club near me
2	Since my firm belongs to Affilica International, it is not an isolated firm like my local competitors are	Local Chamber of Commerce		Local Town Hall
3	Meet visiting accountancy practitioners and law firms from other countries who have clients needing assistance with their deals in my location	Affilica		see "Events" section of www.affilica.com
4	Invite clients, contacts, introducers to a buffet lunch after a PowerPoint about latest business developments in which my practice is active			Local hotel
5				
6				
7				
8				
9				
10				

ORIGINAL ARTICLES

List below articles you intend to write during the months ahead

	Publication	Topic	Date
1	"Affilica Update" e-magazine	What we achieved recently for one of our clients	Half yearly
2	Local newspaper	A success story about our work for a client	quarterly
3	Website of my practice	What we achieved recently for one of our clients	Monthly
4			
5			
6			
7			
8			
9			
10			

YOUR STRENGTHS AS A MARKETEEER

Rate your strengths as a marketer on a scale of 1-10, with 10 as the strongest

	1	2	3	4	5	6	7	8	9	10
One-on-One Interaction										
Ability to recognise Affilica's usefulness										
Public Speaking										
Writing Articles										
Organizing an Event										
Personal Networking										
Team work										
Talking to strangers										
On-the-hoof conversation making										
Building an ongoing working relationship with client to avoid losing them										
Building an ongoing working relationship with an introducer of new clients										
Ability to persuade										
Ability to sign up a new client										
Ability to avoid "buyer's remorse"										
Ability to anticipate opportunities										

TIME COMMITMENT

Insert the number of hours you intend to devote to carry out marketing and business development activities over the next 12 months.

	Week 1	Week 2	Week 3	Week 4
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

_____ Number of hours (non-billable)

BUDGET SPEND COMMITMENT

Insert the amounts we intend to spend to carry out marketing and business development activities over the next 12 months.

	Week 1	Week 2	Week 3	Week 4
January		Upgrade website content		Lunch with a client or contact
February		Spend Friday afternoon reviewing mktg		Lunch with a client or contact
March		Upgrade website content		Lunch with a client or contact
April			Hire hotel, invite clients: presentation & buffet lunch	Lunch with a client or contact
May		Upgrade website content		Lunch with a client or contact
June		Spend Friday afternoon reviewing mktg		Lunch with a client or contact
July				Lunch with a client or contact
August		Upgrade website content		Lunch with a client or contact
September			Travel to next Affilica seminar	Lunch with a client or contact
October		Upgrade website content		Lunch with a client or contact
November		Spend Friday afternoon reviewing mktg		Lunch with a client or contact
December	Season's greetings cards by post			Lunch with a client or contact

_____ Total amount of expenditure (non-billable)

SIGNATURES OF PARTNERS: _____

DATE: _____

The difference between **MARKETING** and **SALES**

<p>From the client's position: - Marketing is about intellectual fact gathering.</p>	<p>From the client's position: - Buying is an emotional decision.</p>
<p>From the professional practice's position: - Marketing is about being found.</p>	<p>From the professional practice's position: - Sales is about being selected.</p>
<p>Marketing is a broadcast activity that communicates your value proposition to a specific group of people whom you have objective reasons to suspect will acknowledge a demand-triggering business problem that you can solve.</p>	<p>Selling is a facilitated, one-on-one investigation that begins only when a Suspect overtly acknowledges the presence of the demand-triggering problem, converting them into a Prospect, and continues until 1) the Prospect reaches an informed, self-interested decision, or 2) the seller decides that further sales investment is not in their self-interest and opts out of the process</p>
<p>Marketing is "pro-active."</p>	<p>Effective selling is compulsion by buyer to make an offer</p>
<p>The efficient Marketer is actively trying to do two things: 1) Target - Your service is a solution. Find an audience likely to have the corresponding problem. 2) Present - We all have a message. Place that message in front of the audience you have identified.</p>	<p>The effective Salesperson is reacting: 1) Listen - Wait until a member of the identified audience professes to the existence of such a problem. 2) Professional in practice - Offer a solution to said problem. Start working for this "client."</p>
<p>Did you notice there is a crucial step missing? "Prospecting". The effective Prospector does one thing: Ask the right questions, the ones that will lead a target audience person to acknowledge that there is a problem. Excluding this step is generally what dooms the entire business development process. Professionals in practice generally go directly from Marketing into Selling, quite prematurely. This often leads to offering the wrong solution to the wrong problem.</p>	
<p>Marketing is about influencing attitudes and opinions.</p>	<p>Sales is about influencing choices and actions.</p>

<p>Marketing is developing a unifying message about who you are, how your product differs in the marketplace.</p> <p>Marketing is strategic - determining who your desired targets are, and by what methods you wish to reach them.</p>	<p>Selling is tactical;</p> <p>it is the one-on-one execution of an overall marketing strategy that involves: developing relationships, uncovering specific opportunities, and presenting solutions.</p>
<p>Marketing is more long term. When you market a company or product the goal is to ingrain the company name and/or product into the minds of the target audience so that when they think of that product or service, they think of you.</p>	<p>Selling is more short term. Bait 'em, hook 'em, reel 'em in. That is not to say that a sale will not result in a long term customer/business relationship.</p>
<p>Marketing is getting them to the dotted line.</p>	<p>Selling is getting them to sign on the dotted line.</p>
<p>Marketing gets you to the deal and sales closes the deal AND if you don't close the deal and your competitor does the salesman gets the blame.</p>	<p>Sales is trackable, black and white. You either close the sale or you don't. It is far more on the line than marketing is and is often more highly rewarded.</p>
<p>Marketing consists of four Ps: Product, Price Place Promotion.</p> <p>For decades, "Place" referred to the physical location of shops or retail stores, but now is understood more broadly to mean distribution or go-to-market schemes.</p>	<p>"Sales" is a discrete business function. Its growth is overdue, and has nothing to do with the relative development of professional firms' marketing functions that, with exceptions, which seems arrested/trapped in Promotion-Only Land.</p> <p>This is an "and" question, not an "or" question; both business functions must develop and mature.</p>

<p>Marketing is much more than promotion.</p> <p>Do any of us believe that our firms' clients simply continue to promote the same old products at incrementally higher unit prices and get them to buyers in the same old way, year after year?</p> <p>Successful companies in vibrant industries continually analyze their product mix relative to demand trends, and constantly adjust pricing and distribution strategies for the same reasons.</p> <p>Choices at cross roads.</p>	<p>Yet in the rush to embrace "sales," we appear to communicate that marketing is over, that we've been there, done that.</p> <p>"Sales" depends on effective marketing; not to make its job easier but to make it possible.</p> <p>In the commercial world, companies with weak or incomplete marketing functions shift that burden onto their sales forces, with predictable effect: they burn out salespeople, turn them over frequently and, ultimately, earn a reputation as a place for good salespeople to avoid.</p> <p>Professionals need to display less reluctance to allocate scarce time and emotional resources to selling. But that could happen only when they perceive that their sales effort was directed to vetted prospects that offered greater chance for success!</p>
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Hopefully you find this free-of-charge business tool from Affilica something useful for you.

In return, would you please provide your feedback to AFFILICA@OutLook.com