

Firm's Long-Range or Strategic Plan

Operating Plan +

Firm Level Plan +

Team Level Plan (Practice Groups) +

Marketing Plan

Individual Level Plan

Golden Marketing Inc. Planning Elements

- 1. Existing Clients
 - Conversations
 - Succession/Transition
 - Delegation (Training, Sharing Int.Capital, & Fostering/Earning Trust)
 - Service Grid
 - Debriefs (Before and After Action Reviews)
 - Product/Skill Development
 - Industry Participation/Focus
 - Expectation Management
- 2. New Clients
 - Target
 - Conversations & Face Time
 - Demonstrate Relevance, Credibility & Trustworthiness
- 3. Influential People
 - Conversations & Face Time
 - Reciprocity & Appreciation (Track, Reward)
 - Clarity of Message (Educate)
 - Target
 - Outside of Firm
 - Clients
 - Others
 - Within Firm (Other Practitioners)
 - Follow-up
- 4. Credibility
 - Worthiness of Trust
 - Behavior/Impression
 - Respected Internally/Externally
 - Competence
 - Write: Articles, Blogs
 - Speak
 - Lead
 - Capabilities (Past Performance)
 - Case Studies
 - Representative Clients
 - Testimonials
 - Involvement in Industry: Visibility in Core Markets
- 5. R&D
 - Innovation: ID and Create New Products/Solutions
 - Improve Effectiveness
 - More Process and Less People Dependent
 - Continuing Education: New Skills
 - Apply Industry Knowledge
 - Identify Key Predictive Indicators (KPIs) for Each Customer Sector

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