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# 5 Steps to Build Your 2014 Marketing Plan

Presented by: Sylvia Montgomery, CPSM



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Today's Hashtag:



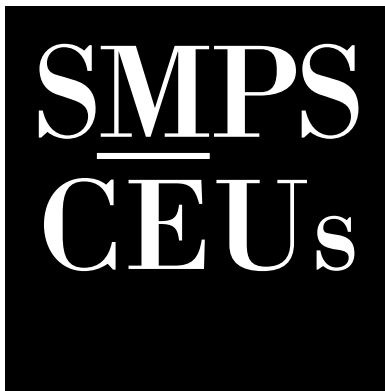
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## Today's Speaker



**Marketing Planning Guide for  
Professional Services: 2nd Edition**

<http://www.hingemarketing.com/library>



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# Agenda

- Creating a Strategic Plan
- Establishing a Foundation
- Offline Marketing Tactics
- Online Marketing Tactics
- The Rhythm of Marketing Planning
- Wrap-Up and Questions





# Creating a Strategic Plan





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# Creating a Strategic Plan

The Marketing plan should be in direct relationship to your business strategy for growth and diversification.

## Business Strategy:

Where is the firm going?

## Marketing Strategy:

What is firm doing to get there?

## Marketing Plan:

How is firm going to accomplish the “what?”



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# When Should You Plan?

**Don't just plan and budget once a year**

- Have periodic reviews and progress updates
- Put deliverables on the calendar



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## Who Should be Involved?

1. Evolved marketing staff model
2. Limited marketing staff model
3. No marketing staff model

A photograph of a building under construction at sunset. The building's steel framework, including columns and beams, is silhouetted against a bright orange and yellow sky. Scaffolding is visible around the structure. The building is partially completed, with some windows visible on the right side. A semi-transparent grey banner is overlaid at the bottom, containing the text "Establishing a Foundation" in red.

# **Establishing a Foundation**



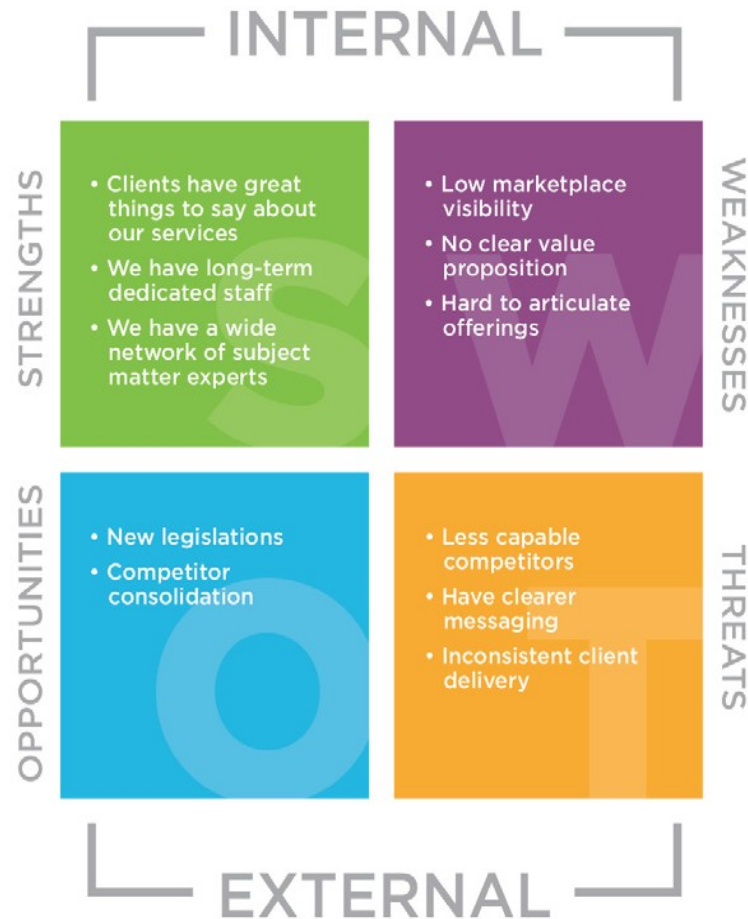
## Deciding Which Direction to Take

1. SWOT analysis
2. Goal setting
3. Existing strengths
4. Projected growth areas
5. Current capabilities



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# SWOT Analysis





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## Goal Setting

- What kind of firm do you want to have?
- What kind of firm do you need to have?
- What is your ideal level of growth?
- Where will business come from?
- What types of clients do you want?



## Strengths Can Be Growth Areas

- What industry verticals are already strengths?
- What kind of services are you good at delivering?
- Where do you offer the most value and enjoy the greatest success?
- Are your target audiences in high-growth industries and what kind of growth opportunities exist?



## Current Capabilities

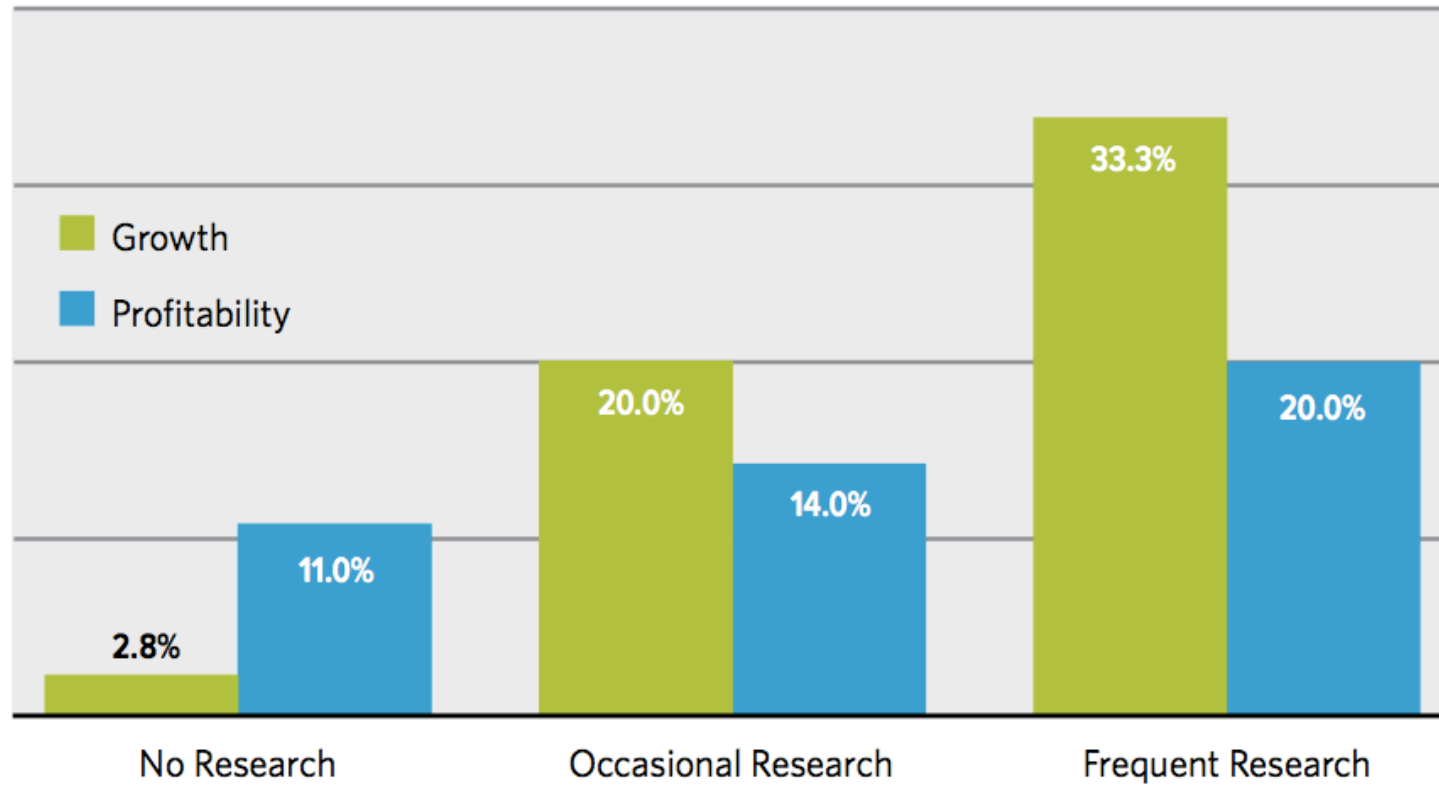
- What services are you prepared to offer today?
- Do your client know all the services you offer?
- What areas do you already excel in?
- Which ones no longer make sense?





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## Impact of Research on Growth and Profitability



## Types of Research

1. **Primary research:** Custom research conducted specifically to answer questions important and of interest to your firm.
2. **Secondary research:** Research that's available publicly through external resources and that usually answers questions about the broad marketplace.



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## Creating a Strong Message

### Research can reveal your true differentiators:

- What is unique about your firm
- What clients appreciate about you
- What your firm is good at





# Creating a Strong Message

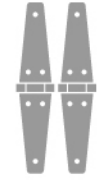
## Characteristics differentiators should have:

- It should be true.
- It should be provable.
- It should be relevant and important to your clients.



# Offline Marketing Tactics





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## Offline Marketing Tactics

1. Advertising
2. Networking
3. Speaking
4. Marketing partnerships
5. Business development training for non-sales staff
6. Public relations

The image features a digital globe as the central element. The globe is covered in a complex network of glowing white lines and hexagonal nodes, resembling a molecular or data structure. It is set against a dark blue background filled with numerous small, bright white stars, creating a cosmic or digital space atmosphere. A semi-transparent grey rectangular box is positioned across the lower half of the globe, containing the text "Online Marketing Tactics" in a bold, red, sans-serif font.

# Online Marketing Tactics





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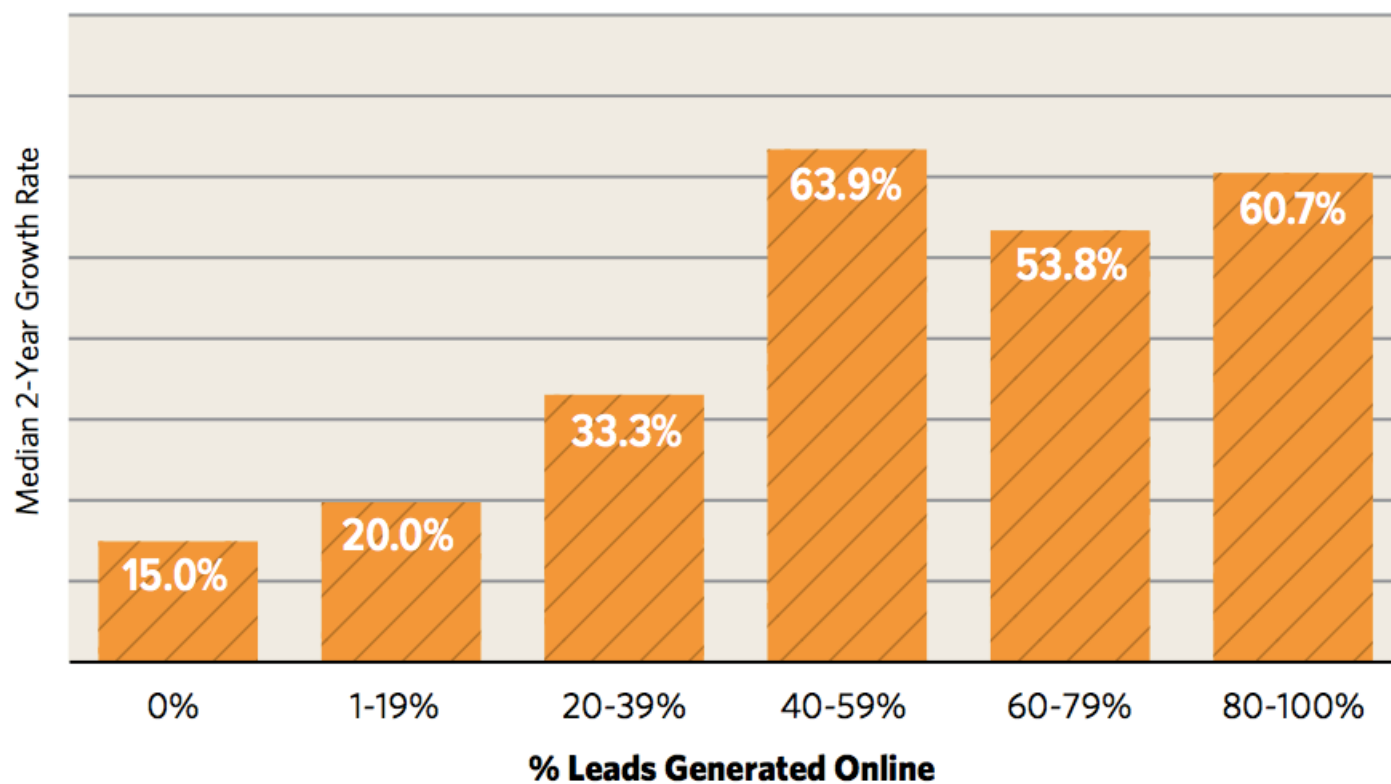
# Online Marketing

1. Invest in your website
2. Develop a content marketing strategy
3. Grow your email list
4. Embrace lead nurturing



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## Online Marketing: Invest in Your Website



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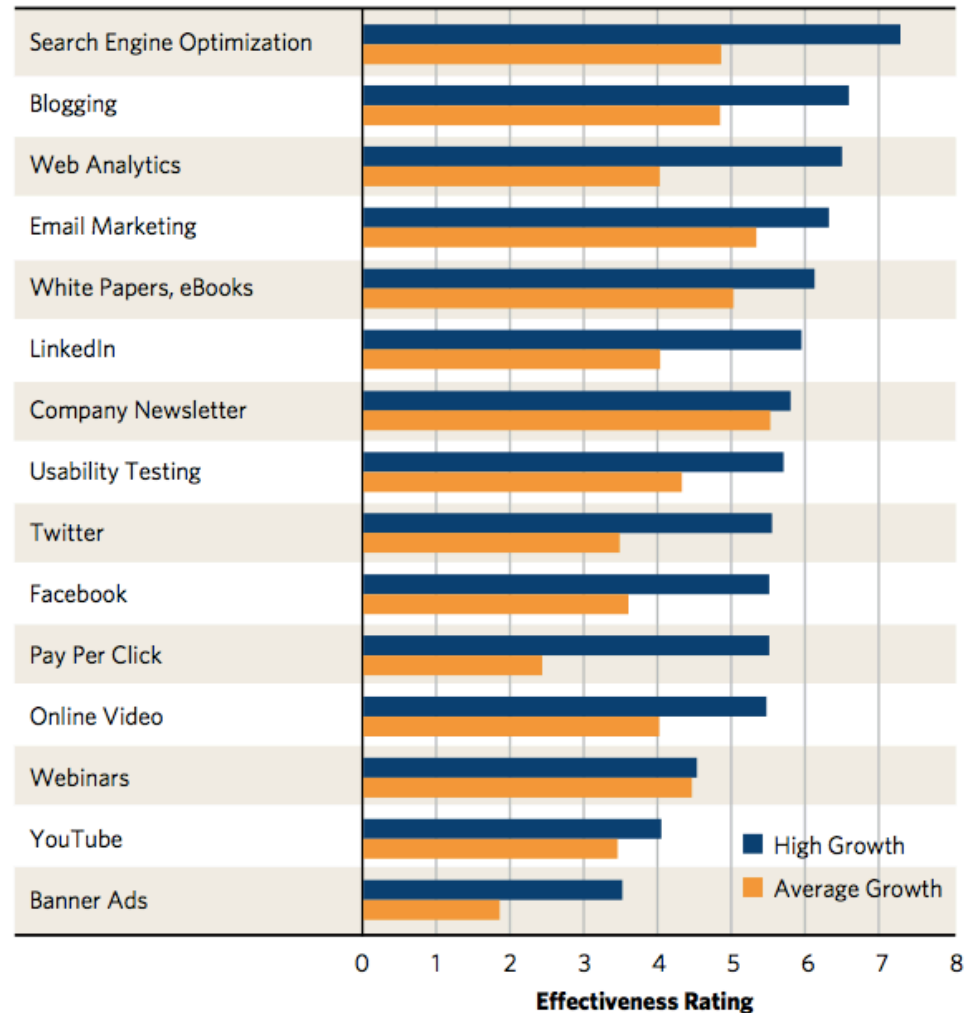
# Online Marketing: Content Marketing





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# Online Marketing: Content Marketing





# Online Marketing: Grow Your Email List

1. Announce new content
2. Promote webinars and events
3. Extend hard offers
4. Link to social media
5. Share blog posts



# Online Marketing: Lead Nurturing

## **Nurture leads through content marketing because:**

1. Not all leads are ready to buy now.
2. You have the opportunity to influence the narrative around the problem.
3. You can educate the prospect over time.
4. Your leads will self-qualify.
5. You can position your firm properly.
6. You will build trust.

# Online Marketing: Lead Nurturing

## Metrics to track for your lead nurturing campaigns:

1. Cost of campaign
2. Number of leads generated
3. Resulting proposals
4. Win ratio
5. Long-term client value



# **The Rhythm of Marketing Planning**



## Arriving at Your Marketing Plan

- Think long term — Act short term
- Limit your initiatives
- Put it in writing
- Monitor your marketing program continuously
- Reevaluate current initiatives and adjust
- Think agile

## Traits of Agile Marketing

- Strategic thinking at all levels
- Respect and balance analytical and creative sides
- Ability to coach fellow technical colleagues
- Ability to respond to matrixed audiences
- Effective multi-tasking – planning long term with flexibility for the current and timely.

**Conceive | Execute | Implement | Review | Adjust**

## Questions Your Marketing Plan Should Answer

1. Is your message clear? Can a prospect describe what value your firm brings?
2. Does your website answer what you do and how your firm is different?
3. Are you offering valuable content that engages your audience and creates/nurtures new leads?
4. Who will capture information and monitor the effectiveness of your marketing program?

## Questions Your Plan Should Answer

5. Which marketing initiatives are most impactful, and which aren't working? Scrutinize Offline and Online.
6. How effective are your staff's networking efforts?
7. Can you clearly identify a marketing role for everyone in the firm? Or is marketing a function for a select few?
8. Do you know how your marketing dollars are being spent?



## Free 2014 Marketing Planning Consultation

✓ For webinar registrants only!



### We'll discuss:

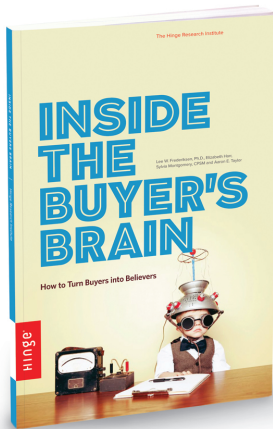
- How your marketing plan compares to best practices in your industry
- How educating your audiences leads to more targeted traffic on your website – and more qualified leads
- Ways to prioritize your marketing strategies to build reputation online

**Simply respond to our follow up email.**



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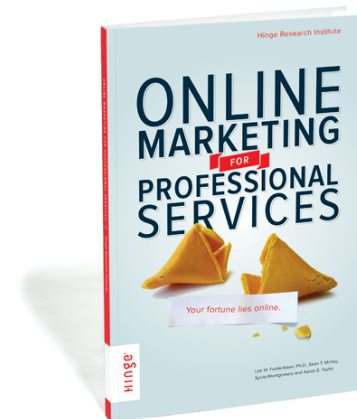
## Free Resources



**Inside the  
Buyer's Brain**



**Marketing Planning  
Guide: Second Edition**



**Online Marketing for  
Professional Services**

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# Thank you! Questions?

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