

Focus your resources on the activities that generate the best return

How can I get a better return on my marketing?

1. List your top three business goals

1. _____
 2. _____
 3. _____

2. Identify your critical marketing activity

- Do you need to acquire more clients?
- Do you need to retain more clients?
- Do you need to increase sales from existing clients?

3. Choose three 3 tactics for your chosen critical activity

Acquisition tactics	Retention tactics	Cross sell / Upsell tactics
<input type="checkbox"/> Referral process	<input type="checkbox"/> More client communication	<input type="checkbox"/> More client communication
<input type="checkbox"/> Networking	<input type="checkbox"/> Create service standards	<input type="checkbox"/> Hot calling your clients
<input type="checkbox"/> Marketing flyer	<input type="checkbox"/> Recommend clients	<input type="checkbox"/> Sales scripts
<input type="checkbox"/> Co-branded promotions	<input type="checkbox"/> Reward loyalty e.g. cards	<input type="checkbox"/> Email promotions
<input type="checkbox"/> Advertising (print/online)	<input type="checkbox"/> Client care program	<input type="checkbox"/> enewsletter promotions
<input type="checkbox"/> PR (print/online)	<input type="checkbox"/> Client survey	<input type="checkbox"/> Educate customers on range
<input type="checkbox"/> Direct mail (mailouts)	<input type="checkbox"/> Expand product range	<input type="checkbox"/> Sales training
<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____	<input type="checkbox"/> Other _____

4. Create a simple marketing plan

Activity	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Budget

5. Measure your results

- Response rates
- Click through rates
- Number of new leads
- Number of new customers
- Average revenue per customer
- Increase in revenue (in dollars)
- Life time value of new customers
- Retention rates
- Net promoter score



How can I strengthen my brand?

Make sure your brand is different, real and relevant

- Great story
- Powerful visual identity
- Strong emotional connection
- Great customer experience
- Regular contact



Notes



What are the top three things I can do to improve my marketing?

1. _____

2. _____

3. _____

