

Marketing Plan Guide



Follow these steps to create a focused marketing plan for your accounting firm.



CAPSTONE MARKETING

How to Use This Guide

- ∞ Our eBook *How to Create a Disastrous Marketing Plan for Your Accounting Firm* described the Top 10 mistakes real accountants make – and how you can avoid them. Now, you're ready for the next step.
- ∞ This *Marketing Plan Guide* contains the components you need for a successful marketing plan. Complete each section and the result will be a focused marketing plan based on thought, research and analytics that will help you manage your time and budget and encourage accountability.
- ∞ Need help? Contact Jean Caragher, 727.210.7306 or jcaragher@capstonemarketing.com.

Who is your champion?

∞ Characteristics of the champion

- Willing and able to lead the team
- Has the respect of other partners
- Wants to achieve famous person stature
- Will get things done – be accountable
- Industry knowledge (for industry niches/plans)



Vision-Mission-Core Values

∞ **Vision**

- The future of your firm. Communicated internally.

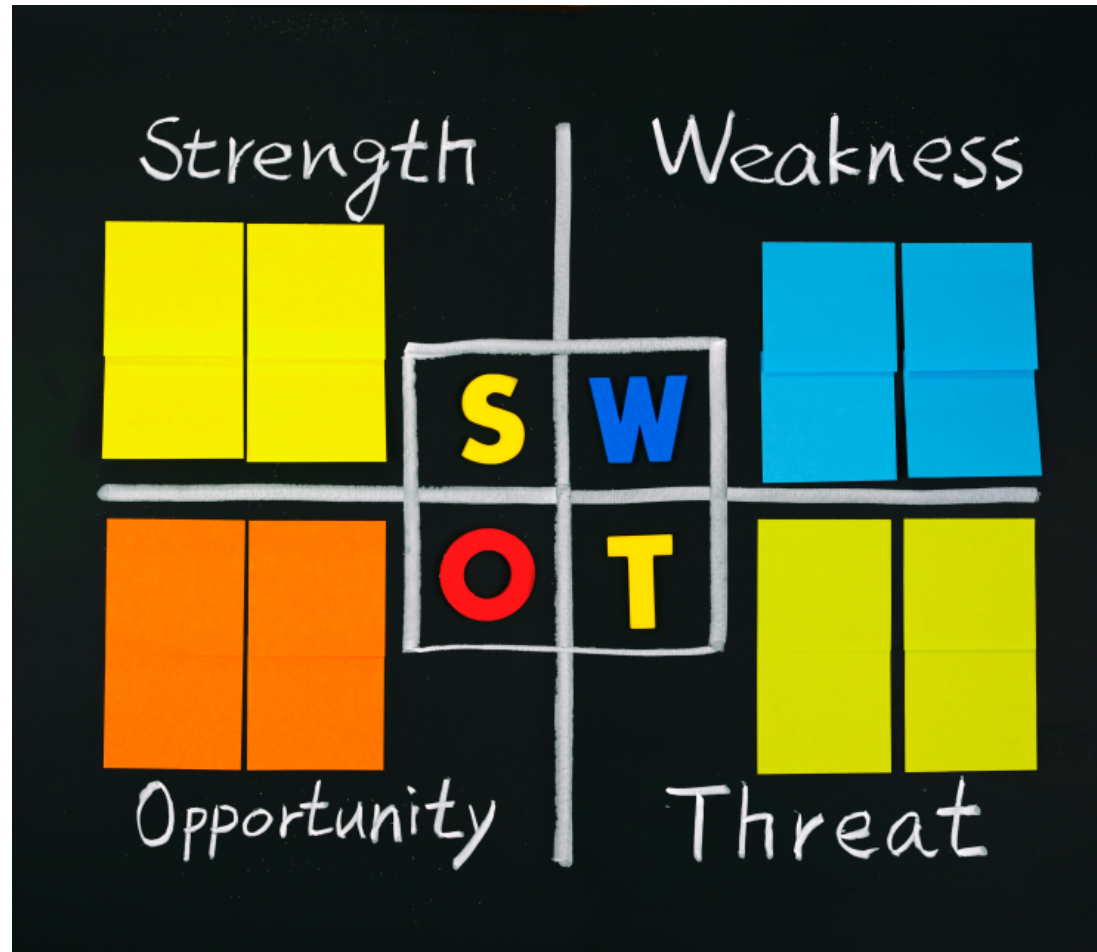
∞ **Mission**

- The reason why you are in business.

∞ **Core Values**

- The essential and enduring beliefs of your firm. Non-negotiable, minimum standards of behavior.

SWOT Analysis



Growth Trends

- ∞ For each of the prior three fiscal years:
 - Net revenue
 - Revenue for Top 25 clients
 - Revenue by service



Client Analysis

Identify niche opportunities by completing this chart.

	Industry #1	Industry #2	Industry #3	Industry #4	Continue with as many columns as you need
Standard Fees (gross)					
Fees Billed (net)					
Realization (fees billed/hours)					
Fees Billed/ Total Fees Billed					
Hours Billed/ Total Hours Billed					
Average Hourly Rate					
# Clients					
Average Fee					

Services

∞ Currently Provided by
Our Firm:

∞ New Services to be
Developed:

List the services your firm currently provides as well as new services to be developed to meet client needs.

Target Market/Prospective Clients



- ∞ Describe prospective clients including the number of companies, sales range, and geographic location.

Competitive Analysis

- ⌘ What industries do they serve?
- ⌘ What services/products do they offer?
- ⌘ What are their fees?
- ⌘ What resources do they have?
- ⌘ What are their current marketing activities?
- ⌘ What alliances do they have?
- ⌘ How successful are they?
- ⌘ Who are their famous people?

How is your firm different from this competitor?

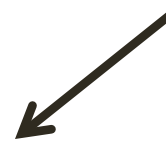
Goals and Strategies

Current client revenue \$
(Less lost clients/non-recurring work) \$
Subtotal \$

New clients: \$
New business from current clients: \$
Overall Goal: \$

Average fee per client: \$
New clients (to achieve revenue goal)
Opportunities (x% close rate)

- ∞ **SMART Goals:**
Specific,
Measurable,
Attainable,
Realistic, **T**imely
- ∞ **Strategies: Action**
steps to achieve the
goal.



1. (SMART Goal):

Action Step	Responsible Person(s)	Deadline

Implementation/Timetable

∞ A matrix of marketing initiatives by month to give you a snapshot of commitments for the year.

January 20xx	February 20xx	March 20xx

April 20xx	May 20xx	June 20xx

July 20xx	August 20xx	September 20xx

October 20xx	November 20xx	December 20xx

Budget

- ✎ Advertising
- ✎ Consultants
- ✎ Content Creation
- ✎ Direct mail
- ✎ E-newsletters
- ✎ Meals/ Entertainment
- ✎ Membership dues
- ✎ Networking
- ✎ Newsletters
- ✎ Postage
- ✎ Promotional items
- ✎ Proposals
- ✎ Research
- ✎ Salaries
- ✎ Seminars
- ✎ Social media
- ✎ Sponsorships
- ✎ Subscriptions
- ✎ Technology
- ✎ Training
- ✎ Website
- ✎ Miscellaneous

Most CPA firms continue to spend between 2% and 4% of net revenue on marketing.

Contact



Jean Caragher
727.210.7306

jcaragher@capstonemarketing.com
www.capstonemarketing.com

Jean Marie Caragher is an award-winning, recognized industry expert, author, speaker and advocate with nearly 30 years accounting marketing experience. Accounting marketing is her passion. Her tenacious approach with her CPA firm clients is based upon her experiences as a CPA firm marketing director, a CPA association executive director, and her 17 years of consulting experience since forming Capstone Marketing. Jean is a founder of the Association for Accounting Marketing (AAM), AAM past president, AAM past Volunteer of the Year recipient, inaugural AAM Hall of Fame inductee and multiple AAM-MAA award winner.

Capstone Marketing provides a variety of services to CPA firms including Brand SurgerySM, Marketing Plan Development and Implementation, Inbound Marketing, Retreat Facilitation, Training, and Marketing Director Recruiting.

CLICK HERE FOR A FREE
30-MINUTE CONSULTATION

Let's
Talk!

If you're ready to create a marketing plan for your accounting firm or have other questions regarding your firm's marketing program click the button above to arrange a free 30-minute consultation!

