

How To Write A

# Marketing Action Plan



based on original article by Robert Middleton at [Action Plan Marketing](#)

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## **What is a Marketing Action Plan?**

The default behaviour for most small businesses or self employed people is to carry out a number of fairly random activities and create haphazard results, they either attract no clients or their process tends to push clients away. With this experience, most retreat to the default plan “Do a great job with existing clients and pray for referrals”. Whilst this sometimes works, it means that your income is unpredictable and your future is in the hands of your clients.

A Marketing Action Plan is a way of putting in place a structured series of activities to get a predictable result. Here are the basic steps:

1. Define the service you want to offer.
2. Define your Target Market for the service.
3. Price and package the service clearly
4. Select marketing activity to implement
5. Give each activity a quantifiable outcome
6. Define additional outcomes
7. Plan the materials required
8. Plan the resources required

These eight steps complete the initial planning stage.

The next step is to plot your step by step activity to implement the plan.

## Step 1: Define The Service You Want To Offer

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Marketing action plans aren't for "general services" but for specific services such as "A six-month coaching program," or "A complete business makeover program."

*Examples:*

*"Two Day Marketing Bootcamp"*

*"Stay and Play"*

*"Portfolio Review"*

*"Pricing Workout"*

*"First Dance Coaching"*

*"The Red Stuff Handbook"*

### **Action:**

Brainstorm a list of specific service packages you could offer and give each one a clear name:

## Step 2: Define Your Target Market For This Service Or Package

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Who are your ideal clients for this service? What are their particular challenges or needs?

*Examples:*

*HR managers or Finance Directors in medium sized businesses who have a growing responsibility for facilities management but as yet do not have a dedicated facilities manager.*

### **For Red Stuff Handbook (Souvenir Price)**

*Been to workshop with me  
Liked my style of explaining Red Stuff  
Concerned to get the Red Stuff right  
Wants organised notes  
Wants instant access to the information  
Wants a checklist that spells it out  
Likes the idea of a souvenir  
Is likely to be going ahead*

### **For Red Stuff Handbook (Full Price)**

*Had a recommendation from someone who has come to a workshop  
Thinking about starting a business  
Curious about the mechanics, tax etc.  
Happy to make a small investment before talking to accountants*

### **Action:**

Pick one of your services from step 1 and write a specific description of your ideal client who has a high probability of wanting/buying this service

### Step 3: Price And Package The Service Clearly

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How much is it? How do I pay? What exactly do I get? And how will it be delivered?

*Example:*

#### **Red Stuff Handbook (Souvenir)**

*You get:*

- 131 page, full colour handbook
- delivered as a .pdf so you can have the information NOW
- designed for double sided printing
- full of live links to other sites or the resource pages
- answers to the 12 basic red stuff questions
- a checklist following every section with a full checklist in the back
- hints and tips on legal structure, tax and expenses
- complete notes of Day 1 of the workshop
- written in an accessible and practical style
- supported by resource pages on line
- table of contents is clickable
- full price of £47 + VAT reduced to £8.70 + VAT

*Not included:*

- It's delivered electronically so it is not printed or bound
- No marketing advice - just red stuff

#### **Action:**

Give your service a price.  
How is this delivered?  
What do I actually get?  
What is included / not included?

Write a literal, step by step description of what you will actually do for them.

## Step 4: Brainstorm All The Marketing Activity You Will Do

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- *Networking (where?)*
- *Attending conferences*
- *Advertising*
- *Leaflet drop*
- *Letter campaign*
- *Email campaign*
- *Blogging*
- *Viral Video*
- *Your own website*
- *Getting in a catalogue*
- *Phone campaign*
- *Joint venture*
- *Joining agency*
- *Friends and family*
- *Giving talks*
- *Public speaking*
- *Publishing your book*
- *Mailing your contact list*
- *Giving free samples*
- *Affiliate or referral scheme*
- *Using Linked In / Facebook / Twitter*

### **Action:**

List all the marketing activity you could do to tell people about this service. Remember to include all the ones that make you nervous.

Then PICK ONE and continue with the other steps

### Example: **marketing activity for Red Stuff Handbook (Souvenir)**

- *Printing and binding a high quality copy as visual aid at workshops*
- *Using it as a teaching aid to explain the benefits while showing how market something*
- *Including attractive offer in post workshop email*
- *Capturing email addresses in return for some free information*
- *Giving a free copy to other SYOB trainers so they can show it around*
- *Announcing offer to Linked In network*
- *Announcing offer to my SYOB mailing list*

## Step 5: What Is The Main Objective Or Outcome You Want To Produce With That Activity?

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This should always be a specific result linked to the activity you have chosen.

*Examples:*

*"By speaking at industry conferences I want to attract 5 new clients this year that each pay me £5,000"*

*"By explaining the benefits of the Red Stuff Handbook I aim to attract two souvenir sales at every workshop - £20 including VAT"*

*"By taking a stall at a wedding fayre I aim to attract two couples a month who will pay £50 for first dance coaching"*

*"By distributing 5,000 leaflets in my local area I aim to generate 50 phone calls leading to 10 bookings for my bespoke sushi evenings at £200 per booking"*

*"By active networking at the two main trade fairs I aim to generate 100 requests for my free report which then turn into 6 new clients who pay me an average of £3,000 each"*

### **Action:**

Pick one marketing activity and define a clear outcome for it with a clear financial result

## Step 6: What Additional Results Do You Want From This Activity?

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Define here the other things you hope for by engaging in this marketing

*Examples:*

- *increased personal confidence*
- *better exposure in the community*
- *build your brand and reputation as an expert*
- *increase your email list*
- *expand your business network etc.*
- *recommendations and referrals*
- *buyers who might trade up to a more expensive package*

### **Action:**

Get clear in your own mind your additional reasons for doing this marketing. What other, less tangible results are you hoping for?

## Step 7: List All The Materials Required To Make This Happen

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Examples:

### **Giving Talks**

- *A web page describing the various talks you give*
- *a list of organisations where you could speak*
- *a "speaker's kit" with a talk outline, biography, testimonial list, and perhaps a CD with a sample talk*
- *handouts for the talk*
- *a form for participants to fill out if they were interested in your services.*
- *Some business cards*
- *An incentive for after the talk - an offer or report*

### **Red Stuff Handbook (Souvenir)**

- *Write, check, edit handbook*
- *Design attractive cover*
- *Print and bind high quality copy*
- *Sales page for website*
- *Download page*
- *Set up autoresponder to deliver it*
- *Paypal button linked to autoresponder*
- *Short summary of benefits*
- *Write email to existing list*
- *Edit post workshop email*
- *Upload free samples to knowledge base*
- *Test purchase*

### **Action:**

Make a list now of all the materials that you will need to make this happen, anything that could possibly be a barrier to you getting on with it.

## Step 8: What Other Resources Do You Need To Make This Happen?

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### Action:

Time: Estimate the time to get ready and to undertake this activity

Money: How much will it cost you and what are you willing to spend?

People: Who else will you need to involve or use (web designer / graphic designer / printer)?

## **NOW: Plot The Exact Sales Process, Moment By Moment, From The Time You Do The First Thing To What Happens With The Customer At Each Stage**

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*You now know what you're offering, who you're offering it to and what it will cost. You've chosen a marketing activity and have outlined the main objectives and results you intend to produce using this marketing activity. Finally, you have determined the materials and resources required to put this marketing activity into action.*

*You now have the foundation for your plan.*

*Next are the action steps to actually get the word out, connect with prospects and set up appointments with those who are qualified to purchase your services.*

E.g. for giving talks:

1. **Target Market:** Identify and contact ideal organisations that could host your talk. Make a list. A LONG list and be persistent in contacting them all.
2. **The Outreach:** Ideally, call these organisations by phone and tell them that you have a talk on "Growing Your Business in a Down Economy." Make it results oriented. If they are interested, they'll ask for more information.
3. **Written Materials:** Send a "speakers kit" by mail or email. Make sure they look professional. Lots of benefits and no typos!
4. **Follow-Up:** Call or email a few days later to see if they got the materials and if they have any questions. If your topic is current, interesting, and valuable you're likely to book some talks from this approach. Again, contact many organisations.
5. **Prepare the Talk:** Prepare, practice, organise slides if needed.
6. **Promote the Talk:** This is the job of the organisation but you can help them by writing the copy for their announcement. Make sure it includes all the benefits that people will receive from the talk.
7. **Give the Talk:** Make it exciting, dynamic and fun. Engage the audience. Do an exercise or two. Make three or four "pithy points" instead of giving a long laundry list of ideas. Make time for questions at the end.
8. **Call-to-Action:** This may be the most important part of the talk. Find a way to collect cards for follow-up after the talk. My favourite way: "Here's an article I've written that covers the key points from today's talk. Who would like a copy? Great, please give me your business card and I'll send it to you."
9. **Follow-Up:** After the talk, send a pdf of the article to everyone who gave you their card. From there you can make offers for your service, invite them to speak to you, etc. Don't leave out this vital step or you'll get very few new clients for your efforts.

**Action:**

Plot the steps of your sales process on a big piece of paper, like a flowchart.

Then: Go back to step 4, pick another activity and repeat steps 5 to 8. Choose a scary one this time!