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## CONTRIBUTORS

# Plan for Marketing Success

Marketing requires planning. The jump-in-head-first approach rarely works because it does not make room for thoughtful up-front preparation. A little concentrated focus and adequate planning of any marketing initiative will save you the frustration associated with a poor response rate.

**Kristy Short, Ed.D** • Oct. 29, 2012



## ***It takes solid planning to build a proper marketing program.***

Marketing requires planning. The jump-in-head-first approach rarely works because it does not make room for thoughtful up-front preparation. A little concentrated focus and adequate planning of any marketing initiative will save you the frustration associated with a poor response rate. It will also save you the expense of campaigns that land in the “flop” pile.

Plan for your marketing success. Before plowing into a campaign, you must think through three key elements: audience, message, and delivery mechanism. Ask yourself these questions before developing your next communication:

1. Who is the audience?
2. What is the message or purpose?
3. How will I deliver it?

While these questions seem straightforward, many firms new to the marketing game launch campaigns without having a properly researched answer. Think about it. You wouldn't send the same lead generation campaign to prospects from multiple niches—for example, chiropractors, restaurants, and auto dealerships. Each audience requires a unique message, geared toward their respective industry. Sending a generic communication across niches will garner little response because it indicates that you don't truly understand each target market. Thinking through the steps of your marketing initiatives will mitigate the number of bad campaigns launched.

### **Answering the Key Questions**

**Question 1—Who is your audience?** Think of your marketing audience as a client. You would never enter a client meeting without reviewing the client's file and having an up-to-date understanding of their needs. Your target market deserves the same consideration. Approach your next marketing campaign by first determining who exactly you are trying to reach. Start with the basics. Are you communicating with current clients or prospects? Current clients do not require an introduction to your firm. Prospects, on the other hand, don't know who you are, so you will need to invest time in explaining your practice and the value you offer.

Taking *Question 1* a step farther, are you trying to reach a unique target market? For example, if you are trying to enter a new niche, you will want to make sure that you communicate your niche expertise within your campaign. Your message will

emphasize your industry knowledge—which will only boost you higher on the value scale!

**Question 2—*What is the message/purpose?*** You must determine a message and/or purpose for each campaign. What are you trying to articulate? Once your audience reads your campaign, what do you want them to do? What is the intended outcome? Do you want them to visit your website? Call for a consultation? Or are you simply generating awareness? Defining the outcome for each campaign will help you craft an appropriate message. If you want an audience to call you, be sure your phone number is prominently placed. If you are trying to transition prospects to clients, create a sense of urgency. You can be sure that if you don't have your audience do anything, they won't.

**Question 3—*How will it be delivered?*** What is the best mechanism to get your campaign in the hands of your target audience? Will you send an electronic communication or a print campaign? Be sure to take cost and timing into consideration. Print campaigns can be expensive and require you to pad your schedule with extra time for printing and mailing. In the end, you need to decide what delivery method will be most effective.

Haphazardly developed marketing campaigns more often than not result in the wrong message going to the wrong audience or a poorly created initiative in general. Think through *who* you are marketing to, the *purpose* of your campaign, and how you will *deliver* it. A well-planned campaign will render better results and make you look like a marketing pro.

**Plan. Produce. Market.**

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### **About the Author**

Kristy Short, Ed.D, is partner and chief marketing officer at RootWorks ([RootWorks.com](http://RootWorks.com)) and president of rwc360 ([rwc360.com](http://rwc360.com))—firms dedicated to providing practice management education, branding, marketing, and public relations services to the accounting profession. She is also a professor of English and marketing. Reach her at [kristy.short@cpapracticeadvisor.com](mailto:kristy.short@cpapracticeadvisor.com).

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