



## **Creating A Marketing Plan**

Chanon Collins

After the opening address at the 13<sup>th</sup> Annual Marketing Summit of Association of Accounting Marketing, 400 marketers scattered to workshops ranging from measuring marketing efforts to trashing the timesheet. For those marketers relatively new to their positions, Melinda Guillemette, an independent marketing consultant, offered sound advice in the daunting task of creating a marketing plan.

Guillemette stressed that the creation of an implementable marketing plan is essential to any practice striving for success. Not only should the organization as a whole have a marketing plan, but – generally speaking – the principals, seniors, and managers should, too. Creating marketing plans requires time and effort, support from the practice leaders, and action. A beautifully constructed plan in a colorful binder serves no purpose unless it initiates action that brings results.

As with most activities within an organization, people will ask the age-old question – what is in it for me? Guillemette believes that marketing plans provide a road map to success, both for firms and for individuals in the firm. Any marketing effort, according to Guillemette, must “find, create, and sustain human relationships.” With this as the driving force, marketing plans can contribute volumes to a firm’s growth and development.

Once the theory of marketing plans was established, Guillemette took the new marketers on a reality tour. The world isn’t perfect, and neither are firms. Some firms take the “virtual plan” approach in which the firm’s marketing plan is an intricate, beautifully constructed plan that resides in the Managing Partner’s head, only to be revealed on an as-needed basis. Other firms practice the “Ready, Fire, Aim” principle where marketing activities are launched with little thought or planning and results are rarely measured because too much time is spent on cleaning up after the chaotic project. Then there are those firms practicing the “Planned Avoidance” method in which plans are written because they were requested and there ends the life of the plan.

A well-constructed and visible marketing plan offers direction, provides accountability, and requires action. Guillemette identified solid marketing plans as including strategies, tactics, actions, and timelines. It is essential to

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remember that the plan must be built around the person who executes it, rather than asking a person to conform to a plan.

The purpose of having individuals create their own marketing plans is two-fold: one, it gives the person ownership and instills motivation to obtain the goals, and two, it gives the Marketing Department nagging rights. It is difficult to fault someone for trying to help you achieve your own goals.

Once the plan is devised, Guillemette offered several tips to ensure that the plans are given the attention deserved. Plans are best kept in a simple format and must always be monitored for progress. For team spirit purposes, celebrate any and all successes through internal newsletters, brag mail, and the firm bulletin board. It is also helpful to have a Marketing Checklist to track results and offer guidelines.

Guillemette closed the workshop with a driven mantra – “Just Do It!” Action is the most essential element to a successful marketing plan. While she noted that a well-executed plan will provide a road map to success, Guillemette added that it helps to remember that we should strive to have fun on the journey.

The Association for Accounting Marketing (AAM), headquartered in Kansas City, Missouri, is the leading trade/educational organization for individuals working in marketing, sales, and communication for accounting firms. Since 1989, AAM has provided members with the information, resources, and market intelligence needed to excel and grow in their careers.

For more information about the AAM Marketing Summit and its presenters or to receive press credentials and a schedule of events, contact Lisa Daniels at 816.221.1296, or [lisa@accountingmarketing.org](mailto:lisa@accountingmarketing.org) .

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