



ALLEGRA

MARKETING • PRINT • MAIL

5 Easy Steps to Completing Your Communications Planning & Budgeting Checklist for Professional Services Firms

Use this strategic planning worksheet to consider all of the ways you can effectively market your organization and communicate with your clients and prospective clients. By first evaluating your current marketing activities (what works and what doesn't), you will be able to identify gaps and begin the planning and budgeting process to achieve your marketing and communications goals.

1. **Set your budget.** It varies by practice and specialty, but a common marketing budget is 3-5% of total sales.
2. **Determine your marketing goals and objectives.** Your objectives might be to increase sales by X amount or gain X number of new clients for example.
3. **Identify the strategies that support your goals.** If your objective is to gain X number of new clients, one strategy may be a lead generation direct mail campaign. Other strategies you might pursue could be a special event or an email marketing campaign that will attract prospective clients.
4. **Create a timetable.** Use your annual plan to schedule your marketing activities throughout the year. Some initiatives will be conducted multiple times a year. Work with your marketing services provider to create an action plan and production schedule for each campaign or activity.
5. **Estimate your costs.** Earmark dollars for your key initiatives, budgeting for them on a monthly basis. Then, track your actual expenses against your budget.

Allegra Can Help

When you call on Allegra, you gain access to highly-trained professionals who provide a wide range of marketing solutions and technologies. The result is a single source for strategic marketing solutions and advice, as well as the resources to execute your marketing programs in the most timely and cost-effective way. Contact us today and discover the more convenient source for communications strategies and services that deliver measurable results.

