

## 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.

## **Budgeting for Professional Services Firms** Communications Planning &

**Organization**:

Marketing Budget: OTHER:

NEW CLIENT LEAD GENERATION & TRAFFIC BUILDING
LIST CREATION CLIENT MEETING SUPPORT MATERIVE SUPPORT MATERIVES
BROCHURES
PROMOTIONAL PRODUCTS
SELL SHEETS/FLYERS
THANK YOU NOTES
BROCHURES
CASE STUDY REPORTS
PRACTICE/SERVICE INFO SHEETS
FLYERS & BROCHURES
POWERPOINT PRESENTATIONS BROCHURES
PROMOTIONAL PRODUCTS
FOLLOW-UP MATERIALS-THANK YOU
INQUIRY DATA CAPTURE PADS Goal: SEO, LOCAL SEARCH & SEM
E-MARKETING
YELLOW PAGES (print & online)
DIRECT RESPONSE MAGAZINE ADS
NETWORKING/MEMBERSHIPS EMPLOYEE RELATIONS/EDUCATION EMPLOYEE MANUALS PRINT ADS
YELLOW PAGES (print & online)
WEB SITE
SEO & LOCAL SEARCH
SOCIAL MEDIA MARKETING
BROADCAST ADVERTISING
VEHICLE/BUILDING GRAPHICS
SIGNS, POSTERS AND BANNERS
POINT-OF-PURCHASE
COMMUNITY INVOLVEMENT
NEWS RELEASES
APPAREL/UNIFORMS
OTHER:
CUSTOMIZED PURLS
NEWSLETTERS
E-MARKETING
SOCIAL MEDIA MARKETING
CUSTOMER APPRECIATION/GIFTS
TARGET MARKETING/LUMPY MAIL
SATISFACTION SURVEYS SIGNS, POSTERS AND BANNERS
AWARDS AND RECOGNITION
APPAREL/UNIFORMS/LOGOWEAR
NAMETAGS
OTHER:
MONTHLY CASH BUDGET CUSTOMIZED PURLS
TELE-PROSPECTING
TRADE SHOWS
DIRECT RESPONSE BROADCAST
WEB SITE TRADE SHOWS/OPEN HOUSE
POWERPOINT PRESENTATIONS
DIRECT MAIL
CUSTOMIZED PURLS LOGO DESIGN BUSINESS CARDS/STATIONERY LETTERHEAD & ENVELOPES FAX COVER SHEETS Communications SIGNS, POSTERS AND BANNERS INVITATIONS/PROGRAMS FAX COVER SHEETS NOTE CARDS SIGNAGE (interior & exterior) **BRAND AWARENESS NEWSLETTERS** Marketing