

One-Page Marketing Plan.

NAME:

DATE:

Your marketing plan should align and support your business goals. Use this template to formalize a marketing plan, or a campaign, which is a time-bound effort that seeks to drive specific results. For additional advice, check out the [Strategies and Tactics guide](#).

1	Timing	Target start date:		Target end date:		☐ Ongoing
2	Marketing Objective(s)	If more than one, prioritize: ___ Support/retain clients ___ Gain awareness ___ Generate leads				
3	Marketing Goal(s)	(e.g. # of leads, meetings, etc.)				
4	Marketing Budget					
5	Target Audience(s)					
6 7 8 9 10 11						
Strategy		Tactic(s)	Collateral	Promotion	Execution	Metrics
Your approach		Your actions	Content and call-to-actions (CTAs)	Where (channels) and how to reach your target audience	Resources needed to execute (owners, technology, etc.)	How will you know how you are doing?



One-Page Marketing Plan sample.

NAME: Vested Financial DATE: 12/30/21

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1	Timing	Target start date: January 2024	Target end date: December 2024	☐ Ongoing
2	Marketing Objective(s)	If more than one, prioritize: <u>2</u> Support/retain clients <u> </u> Gain awareness <u>1</u> Generate leads		
3	Marketing Goal(s)	(e.g. # of leads, meetings, etc.) \$20M in new assets from 5 new clients, largely from referrals and \$5M+ in new assets from existing clients. 1:10 return on investment (ROI) on marketing spend.		
4	Marketing Budget	Up to 2% of revenue or \$20K		
5	Target Audience(s)	Senior or C-level executives with stock options within 25 miles of the office. Their needs: optimizing their tax-situation, managing your stock options through an IPO or SPAC, general stock option		
6	7	8	9	10
11				

Strategy	Tactic(s)	Collateral	Promotion	Execution	Metrics
Your approach	Your actions	Content and call-to-actions (CTAs)	Where (channels) and how to reach your target audience	Resources needed to execute (owners, technology, etc.)	How will you know how you are doing?
Referral and content marketing	- Plant referral seeds with key clients and COIs - Referral process and landing page - Stock option educational videos - Partner with COI - Optimize newsletter and website - Digital ads	- Content calendar - Video scripts and graphics - Stock option IQ quiz - Calendly link with form - Newsletter subscription form - Referral landing page - Template emails - Digital ads	- Their network - Email distribution - Website - YouTube - COI partners - distribution lists	- John: Senior sponsor and content creator (up to 3 hour a week) - Ben: Project manager (up to 5 hours a week) - Hire experienced marketer to do marketing execution (up to \$1,000 a month)	# referral convos # of referral page visitors # of meetings from referrals - Content complete # quizzes complete # new subscriptions # of meetings from non-referrals - Cost per lead - Cost per client