

WORKBOOK

Sage Accountant Solutions Marketing Plan

*Create a custom marketing plan
for your practice*



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How to use this workbook

This marketing workbook will help you to develop a practical marketing plan.

We've compiled the very best marketing questions that relate to accounting and bookkeeping firms to help you get new clients and keep the ones you have. It also includes a handy monthly marketing action list at the end to organize your activities.

It's easy and quick to complete—simply enter your ideas and information that relate to your business in the text boxes. Be sure to save your work as you progress through the sections.

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1. Branding

What does your accounting practice brand represent?

How will you align all your marketing materials and online branding?

What will your practice logo look like?

2. Target audience

Describe your target market for your accounting services.

If you've created a client profile, outline the details below.

List the most effective ways of approaching your target clients.

3. Products or services

What products or services are you selling?

Why will potential clients use your accounting services?

4. Pricing

What is the price for each service?

How do you plan to sell your accounting services?

How have your competitors priced their products or services?

If you have relatively high prices, how will you justify them?

5. Market research

What market research have you done?

What insights have you gained about your clients?

What insights have you obtained about your competitors?

6. SWOT

What are your strengths, weaknesses, opportunities and threats?

Fill out the SWOT analysis below by listing your accounting practice’s strengths, weaknesses, opportunities and threats in the left column. Detail how you could lower or increase their impacts in the right.

Strengths	<i>I will maximize them by:</i>
Weaknesses	<i>I will maximize them by:</i>
Opportunities	<i>I will maximize them by:</i>
Threats	<i>I will maximize them by:</i>

What’s your chosen SWOT strategy?

7. Competitor analysis

What are the strengths and weaknesses of your main competitor?

Fill out the SWOT analysis below by listing your accounting practice's strengths, weaknesses, opportunities and threats in the left column. Detail how you could lower or increase their impacts in the right.

Strengths	Weaknesses

How will you combat their strengths and target their weaknesses?

Who is your other key competitor?

Fill out the table below with the strengths and weaknesses of your second key competitor.

Strengths	Weaknesses

How will you combat their strengths and target their weaknesses?

8. Marketing strategy

What is your overall marketing strategy for the year?

How will you use online marketing to increase sales and brand awareness?

What's your competitive advantage?

What's your marketing budget?

How much money do you have to spend on marketing activities? Enter text below.

Marketing Activity	Suggested % of budget	Your annual budget
Personal selling (lunches, etc.)	5%	
Email marketing	15%	
Website	20%	
Social media marketing/blogging	20%	
Referral programs (thank-you gifts)	20%	
Advertising/publicity	10%	
Local events/conferences	5%	
Contingency	5%	

9. Social media

Which social media platforms will your accounting practice use, and why?

Platform	Why?
Website	
LinkedIn	
Facebook	
Instagram	
Twitter	
Blog	
Pinterest	
YouTube	
Snapchat	

10. Promotions and publicity

What promotional activities do you have planned for the next year?

What publicity activities do you have on the horizon?

11. Advertising

What's your advertising message?

How will you advertise your services?

What are the features, advantages and benefits of your services?

12. Schedule your planned marketing activities

Expand this table to schedule your marketing activities by month. See examples.

	Activity 1	Activity 2	Activity 3	Activity 4
Jan				
Feb				
Mar				
Apr				
May				
Jun				
Jul				
Aug				
Sep				
Oct				
Nov				
Dec				

Marketing Plan template courtesy of Sage Accountant Solutions



For more info, visit:

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