

# Your one page sales and marketing planning tool

## 1. Growing your income

There are four ways you can earn income: by selling your existing products to your existing customers, selling new products to your existing customers, offering your existing products to new customers, or selling new products to new customers. What are your plans & your targets in each of these areas?

	Existing customers	New customers
Existing products	£	£
New products	£	£

## 2. How many customers do you need?

To achieve your income goals in 1 you need to work out how many customers you need. You can do this using the table below. First how much does the average customer spend with you and therefore, how many of them do you need in order to hit your growth targets? And allow for those you will lose.

	Existing customers	New customer group 1	New customer group 2	New customer group 3
Average value of a customer	£	£	£	£
Expected lost income	£			
How many customers do you need?				

## 3. Where will you sell?

Now you know how many customers you need, you have to reach them; where will you speak to them and sell your products to them? In the boxes, state the communication channels you will use to speak to them and the distribution channels you will use to sell to them and how much income each will generate?

	Existing customers	New customer group 1	New customer group 2	New customer group 3
Where will tell them that you exist?				
Where will you sell to them and how much income will each channel generate?				

### Awareness Broadcasting

#### Relevance

- How will you make the message relevant to your target audience
- What is the right medium to appear where they are living their lives (on and offline)
- What type of language do you need to use
- How do you get them to recognise your logo and name and what you stand for
- What benefit will they gain from listening
- How will you make them interested in finding out about you

#### Being heard above the traffic

- Why will they take notice of you over and above the noise from everyone else
- How will you make you and your message stand out and interesting
- What will be unique/striking about your style & message
- What possible channels exist to reach them and what are the pros and cons of each channel
- What do you want them to do as a result of hearing your message

#### PR/Publicity

- How much will you spend
- When do you want it to happen and how often
- What are your three key messages
- From your knowledge of your target audience, what are the appropriate communication media
  - Local & regional press, radio & television
  - Speeches & professional bodies
  - Websites & local events

#### Being there when needed

- How will we remind them of your existence at the point in time when they discover they need you
- How will remove any perceived risks for them
  - E.g. Use of trial
- What do we want them to do when the need arises
- How do you maintain a high and persistent presence in social media

#### Initial contact

- How will you make it easy for them to contact you
- How can you make sure that they contact you, not your competition
- What do you want to tell them when they contact you
- What response are you seeking from them after they become aware of you
- What do you think they will want to do after they become aware of you

### Interest Starting a conversation

#### When they contact you

- By which means/channels will they reach you
- How will you respond in each channel to reinforce your marketing message and proposition
- What initial concerns will the first time user have & how will you overcome them
- How can you use a give away to draw them in
- What is likely to go wrong at this point of initial contact and how will you recover

#### Evidencing the benefits/value

- What are the top three messages you need to get over
  - In what ways can we articulate them
    - Verbally, in writing, face to face, on line
  - Metaphors, stories, visuals, presentations, case studies
  - Handouts, brochures, website, blog, tweet
  - Advertising, Media & PR
- What do you want them to do as a result

#### Reassuring

- What is the role of your brand to reinforce the value
  - How will you go out and reassure them
    - E.g. training/seminars and trials
- How will remove the risk for them
  - E.g. Use of trial, visiting your business, the website, referrals & recommendations
- How will you evidence your long term intention to work with them

#### Building credibility

- How will you show them what has been delivered in the past
- What will you use to evidence your capability and resources
- How will you evidence the value you have delivered elsewhere
- How will you give examples of ease of use
- How will show that you can deliver for them
- How will you engage them in conversation in a way that will be relevant and draw them in

#### Making service tangible

- How can you bring your service to life
- How can you make the service that you offer, physical and tactile
- How can you evidence the benefits you bring
  - Why are you different
- What will lead them to aspire to use you

#### Ongoing contact

- Having raised awareness and interest, how will you maintain it
- How will you collect/ maintain contact details
- How will it reinforce your message and proposition
- What do you want them to do now
- How will you use the following:
  - Newsletters/updates/specialist press, direct marketing to maintain the relationship

### Desire A personal conversation

#### Their decision making

- How do you make it easy for them to say 'yes'
- How do you find out about their decision making unit
  - Who's in it
  - What are their individual goals and issues
  - What's the limits of their powers
- What are their budgeting limits
- What are their internal approval processes
- How can you provide the information they will need to make the decision to buy
- How can you influence their decision makers

#### ROI

- How will you understand their goals intimately
  - What are their business drivers and why
  - How will you drill down and deeply understand their aspirations
- How will you configure your service so that the benefits clearly outweigh the costs
- How can you use discount codes
- In what way will you relate the costs to the overall value

#### Managing emotions

- How do you get them to want to do business with you
- How will you use 'people buy people' for advantage
- How can you build trust to move them away from rational and cost based making decision
- In what ways can you raise the emotional desire
- How can you help them relate the outcome to their personal goals and values
- How will you get them to visualise the end state
- In what ways can you keep the whole process very simple

#### Maintaining momentum

- How can you keep them moving and not let them get sidetracked
- In what way can you prepare in advance so that solutions can be offered with pace
- How can the pace be maintained
- How can you help them to justify the proposal to others
- How can you make it very easy for your customers to buy and start a relationship with you

### Action Becoming friends

#### Closing the sale

- After closing the sale, how will you reinforce the value that you will deliver and the reasons why they bought
- What will you do in acknowledgement of winning the business
- How will you get them to tell someone else
  - To whom & by what means
- How will you get feedback on your sales and marketing performance
- How will you learn from the wins and losses

#### Deeper and wider

- How will you show them the value of what they have got so they do it again, and again and...
- How will you evidence your broader capability so they buy other services and products
- How and why will they make an introduction to a friend or colleague
- How will you get feedback on your delivery performance

#### Maintaining the relationship

- What information will you collect about them
- How will you use it to maintain ongoing contact
- How will you let them know about other services
- How can they contact you for further information
- What will happen when they do
- How will you evaluate your overall success