

Before You Dive into Optimization: Document Your Roadmap and Strategy

Here's how to create a simple plan that will put your lack of strategy to bed once and for all.

A roadmap that is unfinished is useless. In my first book, *Web Marketing on All Cylinders*, I went a bit wild on the strategy chapter. I even built a piece of marketing planning software at plansprout.com, which you can give a try if you like.

The problem is that I provided so many details on each tactic and how they went together that many people got lost in the weeds and didn't get their marketing plan done.

So instead of creating a long and overly detailed marketing plan that might work for a large enterprise or a marketing geek, the idea I want to focus on here is for you keep it small and get it done relatively fast. The plan has two parts, briefly described below.

First, start with writing one paragraph for each of the items on this list.

1. Executive Summary and Marketing Strategy Synopsis: Write this last, but put it first in your written plan.
2. Business / Marketing goals: Key progress indicators (KPIs) are used to track progress. List the #1 and #2 things you want to see happen both short and long term.
3. Your Competitors: List at least four and identify what they do better than your firm.
4. SWOT: Write one sentence for now on your strengths, weaknesses, opportunities, and threats.
5. Budget for marketing: Set a realistic number (5% of revenue to maintain, 10% to grow, 7% average according to cmosurvey.org).
6. Timing: For now, just list a few key dates. Later you can assign each task a date.
7. Project Management Tool: Make sure you and your team are clear on how you will keep organized, and commit it to writing.
8. Roles: Who will implement which parts of the plan? For now, just list the key players and the agreed-upon tasks they are responsible for.

Second, list some of the key digital marketing and sales tasks that will be part of your plan. These include attracting prospects, converting prospects, closing prospects, and delighting customers. Let's take a quick look at each of these.

Attracting Prospects

1. Who we are targeting and why. List key personas such as “business owner Barbara,” “marketing manager Mark,” etc.
2. Your message and unique selling proposition. Explain why customers should buy from you versus the competition.
3. List the marketing tactics you will use.

Here's a quick list of specific tactics to spark your thinking, if you want to do this in a way that gives more detail across channels:

Branding – What is our firm's core message, unique selling proposition (USP), and mission?

SEO – What are example keywords people might use to search for our firm?

Content Marketing – What types of content will resonate most with our customers?

PPC & Paid Advertising – What keywords will most likely lead to direct conversions?

Conversion Rate Optimization (CRO) – How will split testing show which creative works best?

Email and Marketing Automation – How can we grow our list and nurture leads?

Online Public Relations – What part of our story or sizzle will attract journalists?

Social Media – What social media sites are our prospects most likely to use?

Persuading Referrals – How will we persuade referrals to hire us after they have searched for our firm?

Design – What design projects should we work on and why?

Development – How can we avoid technical issues and improve mobile user experience (UX) / page speed?

Converting Prospects

What calls to action will we use to get calls and leads? These might include unique web phone numbers, live chat, e-book downloads, contact forms for those who know what they want and those who do not, “buy now” buttons, etc.

Do we have content for each stage of the marketing funnel (awareness, consideration, decision), such as e-books, white papers, case studies, and contact forms?

Closing Prospects

How we will nurture our leads using tools such as HubSpot, Marketo, or Infusionsoft marketing automation?

What is our sales conversion strategy?

Delighting Customers

Once people decide to hire us, how we will wow our customers and stimulate referrals?

Conclusion

A marketing plan is a rare bird for a small law firm, as far too many just wing it and dive right into the shiniest new tactics.

Now that you have created a quick basic marketing plan, review this checklist to sort out what not to do.