Marketing and Business Development Toolsets

Establishing a strategic marketing and business development plan is crucial for remaining competitive in the market, gaining new clients, establishing new service lines and niches, and positioning your firm to attract the brightest. Deepening client relationships, generating new engagements, establishing referral sources and understanding your personal marketing strategy within your firm’s goals are all important skills for your people to develop. The ConvergenceCoaching Marketing and Business Development Toolsets will provide you with valuable templates, tools, articles, and resources designed to support you as you implement new practice development programs.

Marketing Toolset

The Marketing Toolset contains templates, tools, and resources to help you as you develop your firm’s marketing strategy and define your competitive value proposition and brand identity. In addition, it will support your lead generation and personal marketing activities and help you organize your resources as you build out your firm’s marketing function. In this toolset, you will find 51 templates and tools and 31 articles in five distinct areas of marketing, including:

Marketing Planning

- Articles
  - Close More Ideal Business by Selling to Target Accounts
  - Competitive Differentiation
  - Creating an Intentional Corporate “Culture of Cool”
  - Creating and Communicating Value Statements
  - Does Your Firm Have a Vision for Its Future?
  - Features vs. Benefits
  - Manage Your Niche Wisely: Eight Strategies to Ensure Niche Practice Success
  - Marketing 5 P’s
  - What Are Your Firm’s Values?

- Tools
  - Client Analysis Grid
  - Client Termination Letter
  - Competitive Analysis Grid
  - Closing the Right Business Worksheet
  - Cultural Attributes Assessment
  - Developing Feature/Benefit Statements Exercise
  - Developing Your Elevator Pitch Exercise
  - Marketing Calendar
  - Marketing Calendar At-a-Glance Schedule
  - Marketing Campaign Objectives Worksheet
  - Marketing Check-Up
  - Marketing Plan Sample
  - Marketing Plan Template
  - Mission, Vision, Values Samples
  - Niche/Service Line Initiative Planning Worksheet
  - SWOT Template
  - Values Compilation Grid
  - Values List and Exercise
  - Vision Exercise

Lead Generation

- Tools
  - Firm Story Writing Worksheet
  - Press Announcement Sample
  - Press Relations Fact Sheet
  - Press Relations Guidelines
  - Quote Approval Form
  - Rebrand Letter Sample
  - Success Story Package
    - Interview Questionnaire
    - Quote Approval Form

Personal Marketing Strategies

- Articles
  - Back to Business Development Basics
  - Busy Season Marketing Must Do’s
  - Deepening Client Relationships: Ten Strategies to Avoid Key Client Loss
  - Experience Greater Networking Success By Bringing Something to the Party
  - I’m on LinkedIn. Now What?
  - LinkedIn Getting Started Checklist
  - Network While the Sun Shines
  - Networking Starts at the Airport

Branding

- Articles
  - Article and Press Release Writing
  - Gain Real Results from Social Media Through Strategy, Training and Policy
  - Gain Real Results from Social Media
  - Launching a Public Relations Campaign
  - Marketing’s Marketing and Sales Roles Grid

Marketing Roles

- Articles
  - Association for Accounting Marketing’s Marketing and Sales Roles in Accounting
  - Marketing Coordinator Position Description

- Tools
  - Director of Marketing Position Description
  - Director of Marketing/Vice President of Marketing Position Description
  - Interview Questionnaire for Sales/Marketing
  - Marketing Coordinator Position Description
  - Reference Checking Form for Sales/Marketing
  - Sales and Marketing Coordinator Position Description
  - Sales and Marketing Roles Grid

Networking Works: And It Doesn’t Have To Be Old School!
- Articles
  - Network and Referral Marketing Plan
  - Personal Marketing Plan
  - Personal Meeting Tips
  - Referral Source Qualification Tool
  - Referral Source Tracking Grid
  - Social Networking Glossary
  - Social Media Policy Sample
  - Social Media Resources

Keeping Your Brand Commitment

- Articles
  - What is Your Story?
  - What’s In It For Me?

- Tools
  - Vision Exercise
  - Values List and Exercise
  - SWOT Template
  - Worksheet

Never Let Them See You Sweat

- Articles
  - Top Three Business Uses for Twitter
  - Never Let Them See You Sweat
  - Referral Source Marketing to Amp Up Business Development
  - Start Using Twitter to Develop Thought Leadership
  - To Tweet or Not to Tweet: What’s the Question?
  - Top 10 Social Networking Do’s and Don’ts

Without Spending a Fortune!

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  - Top Three Business Uses for Twitter
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Network While the Sun Shines

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  - Top Three Business Uses for Twitter
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Marketing Plan Template

- Articles
  - Marketing Plan Template
  - Marketing Plan Sample
  - Marketing Plan
  - Mission, Vision, Values Samples
  - Niche/Service Line Initiative Planning Worksheet
  - SWOT Template
  - Values Compilation Grid
  - Values List and Exercise
  - Vision Exercise

Marketing Calendar

- Articles
  - Marketing Calendar
  - Marketing Calendar At-a-Glance Schedule
  - Marketing Campaign Objectives Worksheet
  - Marketing Check-Up
  - Marketing Plan Sample
  - Marketing Plan Template
  - Mission, Vision, Values Samples
  - Niche/Service Line Initiative Planning Worksheet
  - SWOT Template
  - Values Compilation Grid
  - Values List and Exercise
  - Vision Exercise
Business Development Toolset

The Business Development Toolset contains 42 templates and tools and 23 articles in four distinct areas of business development to help you develop your firm's cross-selling and sales functions, including:

Client Service and Cross Selling
- **Articles**
  - Client Meeting Strategies
  - Cross Selling: Mining Gold in Your Own Backyard
  - Deepening Client Relationships: Ten Strategies to Avoid Key Client Loss
  - Develop a Team of Client Owners
  - Enhancing Client Relationships Through Personal Meetings
  - Enhancing Client Relationships Through Surveys
  - Grab Your Share of the Market
  - Retaining Clients - What Does it Really Take?
  - Simplify Your Client Satisfaction Surveys
  - Take Advantage of Planning Season
  - Tending Your Small Business Clients
  - The Power of Simple Client Service
  - Wow Your Clients - Ask Them for Feedback
- **Tools**
  - Client Analysis Grid
  - Client/Lost Client Check-in Emails
  - Client Meeting Guidelines
  - Client Relationship Roles
  - Client Satisfaction and Cross Services Survey
  - Client Service Self Assessment Tool
  - Client Termination Letter
  - Cross Selling Matrix
  - Enhancing Client Service Exercise
  - How We Work Document for Clients
  - New Client Welcome Letter

Sales Methodology
- **Articles**
  - Does Your Firm Have a Sales Culture?
  - Qualifying Your Prospects
- **Tools**
  - Rapport Building Question Tool
  - Sales Planning Worksheet
  - Selling Your Ideas Methodology Tool

Sales Process
- **Articles**
  - Back to Business Development Basics
  - Close More Ideal Clients by Selling to Target Accounts
  - Develop Business Using LinkedIn
  - Developing Winning Proposals
  - Driving Revenue through Your Firm’s Pipeline
  - Tools to Create Consistency in Your Sales Pipeline Process
- **Tools**
  - Client Pipeline Sample
  - Engagement Letter Sample

Sales Roles
- **Articles**
  - Association for Accounting Marketing’s Marketing and Sales Roles in Accounting
  - Rain Comes in Many Forms
- **Tools**
  - Account Manager Position Description
  - Bonus Plan Sample
  - Business Development Manager Position Description
  - Interview Questionnaire - Sales and Marketing
  - Reference Checking Form - Sales and Marketing
  - Sales and Marketing Coordinator Position Description
  - Sales and Marketing Roles Grid
  - Sales Coordinator Ad Samples
  - Sales Coordinator Position Description
  - Sales Leader Position Description

To order the Toolset(s), go to www.convergencelearning.com and choose the Marketing and Business Development link under Tools on the right side of the page.

Once you order, instructions will be sent to you via email so you can immediately retrieve your Toolset(s) via a secure file transfer.

For more information about the Toolsets, ConvergenceCoaching, LLC, or our training programs and consulting services, visit our website at www.convergencecoaching.com.