

Marketing and BD planning in a nutshell

Planning in the professions is always a challenge. This interactive session is designed for both those who are new to marketing and business development planning and to those who studied the subject with the CIM and need to get started in applying that knowledge in a professional partnership. It will also help those with specialist roles understand the broader marketing perspective.

**Beginners/
Intermediate
level**

Through exercises and discussion with other delegates, the session will provide confidence, motivation, new insights and ideas for those tasked with developing or implementing plans and achieving fee-earners buy in to their implementation. Delegates should leave the session with a clear plan for how they start or improve the planning in their firms.

The workshop qualifies for 3 hours CPD.

Topics covered

**Why choose PM
Forum training?
See overleaf...**

Introduction

- Why do we need plans? Why is planning in a partnership so tough?
- Starting points – the business plan and what to do if there isn't one
- Plans for marketing and plans for fee-earners

Fundamentals revisited

- Theory revisited – MacDonald, Maister and Mayson
- The difference between strategic and tactical
- Working through the marketing audit
- The value of research
- Effective goal setting
- Choosing appropriate strategies – Segmentation, positioning and targeting
- Brand, the promotional mix and campaigns (includes digital marketing)
- Budgets and time management
- Maintaining and monitoring progress

Particular points for the professions

- Working with inadequate data
- From silos to integration
- Managing the matrix
- Gaining fee-earner buy in and involvement
- Moving from marketing to selling and relationship management

Planning challenges

- Changing markets, competition and commoditisation
- International influences
- Leadership
- Motivational
- Integration
- Demonstrating ROI

What do you do now?

Summary – Confidence. Counsel. Contribution. Control

Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit www.pmforumglobal.com



Thursday 25 February 2016

This half-day workshop takes place from 9.00 to 12.30 starting with a light breakfast.

To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per firm

Trainer



Kim Tasso has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for PM magazine.

Further information at www.kimtasso.com.

For information on other training workshop visit www.pmforum.co.uk/training

