

The Proactive Marketing Executive

This is a popular interactive full day workshop for senior marketing/BD assistants and executives who want to a) move from responsive service provision into a proactive advisory role and b) grow into more managerial, strategic and client-focused areas. We've taken the session online. The workshop qualifies for 6 hours CPD.

Intermediate
level

This intensive workshop expands on the themes in the *Practical and Professional Skills for Marketing Assistants* workshop and allows more time to explore the issues. This course contains several group exercises which provide ample opportunity to talk to and learn from other participants.

Topics covered

Why choose PM
Forum training?
See overleaf...

Orientation

- Aims, agenda, rules of engagement and introductions
 - Being proactive, confident, challenging and focused
- Group exercise 1: Fundamentals quiz*

Towards strategic marketing

- BD – marketing, selling and relationship management
 - Buying processes and the client journey
 - Strategy, the marketing mix, segmentation and the sector matrix
 - How marketing audits and plans help you to help fee-earners
 - Goal-setting and measuring marketing effectiveness (ROI)
- Group exercise 2: Tactical marketing and BD techniques*

Extending tactical marketing knowledge

- Toolbox and campaign competencies
 - The shift from outbound to inbound marketing
- Group exercise 3: Techniques in depth*
- Digital PR and content management
 - Campaign development and thought leadership
 - Selling, tendering and new business development
 - Relationship management and KAM
 - MarTech in professional services firms

Managing tactical marketing programmes

- Crisis management
- Group exercise 4: Managing marketing/BD operations*
- Developing effective briefs and managing suppliers
 - Managing junior marketing staff (and resilience)
 - Balancing priorities, time and project management

Working more closely with fee-earners (internal clients)

- Group exercise 5: Relationships with fee-earners*
- Dealing with 'difficult' people
 - Developing your personal profile – trust and positive communication
 - Influencing and achieving buy-in

Getting closer to clients

- From marketing to business development
- The sales and decision-making processes
- Pitching and tendering
- Developing your market, product and client knowledge

Developing your career

- Marketing qualifications and skills
 - Team structures and career paths
- Group exercise 6: Future career questions*

Thursday 1 October 2020

The full-day workshop takes place online from 9.30 to 17.30.

To facilitate interaction, workshops are restricted to 18 attendees – maximum of four from the same 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.

Eligibility



This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 3,000 marketers in professional services firms. Visit www.pmforum.co.uk

Why PM Forum training?

Courses are designed and delivered by **qualified and experienced professionals** who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience in **learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in **Continuing Professional Development (CPD)**
- Dialogue can continue after training through members-only **LinkedIn communities**

Venues

Online

Fees

First attendee	£375 + VAT
Second attendee	£365 + VAT
All subsequent attendees	£355 + VAT

Maximum of four attendees from the same firm. Prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes handout of workshop material.

Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

The Proactive Marketing Executive – 1 October

Name	Name	Name
Position	Position	Position
Firm	Type of firm	
Address		
.....		Postcode
Tel	E-mail	

Please pay by Visa/Mastercard/Maestro/AmEx (*please circle one*)

Cardholder name:	Amount: £	Security
Card number:	Expiry date:	code:

Signed Date

Confirmation of booking will be sent by return along with a VAT receipt

Please return this form to: training@pmint.co.uk
020 7786 9786 www.pmforum.co.uk