



Sample Departmental Marketing Plan

Department: Tax & Bookkeeping

Reminders:

1. This is a guide designed to make your planning easier. If it doesn't work, modify it according to your department's needs.
2. Avoid phrases like "ongoing" in the deadline section. Try to have specific dates so you can see what you've accomplished.

Overall Goal	Action	Deadline	Champion	How will you measure success?
Through personal contact, strengthen relationships with clients, referral sources and prospects.	Identify top percentage of clients based on revenue and meet with them quarterly.	Begin process 10/1/01	Principals & Senior Managers	Additional work, retention of clients and on-going feed back from the process
Be advocates for our clients and their industries	Identify existing industry groups, etc. we are involved in, or that we need to join, become very active in meetings, writing articles and speaking whenever possible in front of these groups.	Begin by 10/1/01	Principals Senior Managers	Number of new referrals and new relationship contacts built from this process
Provide a unified approach to marketing	Centralize all marketing efforts through	Immediately	Dept. head and marketing director	Good quality product and success of each piece,

505.263.9460
 mguillemette@comcast.net
 www.melindamarkets.com

P.O. Box 1529
 Corrales, NM 87048



	marketing department to ensure consistency and quality.			i.e. feed back based on intended purpose, response rate
Continue to brand firm	Consistency in the way we answer the phones, in the way we deliver our products, etc.	Ongoing	All Principals and Senior Managers with monitoring by marketing director	Happiness of clients (positive feed back from clients)

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