

WORKSHEET – Sample Marketing Plan – A Roadmap for Growing Your Business Example

Mission Statement – Purpose, vision, objectives (from Business Plan)

Ideal client

- Any couple wanting to heal their relationship or desiring Discernment Counseling
- Committed to doing the work
- Able to pay full fee
- Fits in my schedule

Description of services

- 60 min couples therapy sessions
- 90 min couples therapy sessions
- 120 min Discernment Counseling sessions
- Day long intensive sessions
- 15 min free consultation calls

Market analysis, competition

- How many couples counselors are there in your area?
- What are clients looking for?

Pricing strategy

- What are your business expenses?
- How much profit do you need to live comfortably?
- How many visits can you reasonably do in a week/month?
- What fee is reasonable in your area?
- Set fees accordingly
- Raise fees annually

Establish measurable goals –

- Number of new referrals per month
- Conversion rate
- Number of actual visits per week/month
- Financial goals: monthly, annually

Monitor results – metrics weekly, monthly, annually

- Keep a spreadsheet and enter data regularly
- Know your money
- Measure progress towards goals

List of tactics (examples) Add expected date of completion

- Write elevator speech by September 1st
- Write scripts for first phone call and first email response by August 15th
- Adjust website for optimum SEO by October 1st

- Join case consult group by November 1st
- Schedule and complete coffee dates with ten therapists by end of quarter two
- Write article for local newspaper by October 1st
- Create script for video for website by end of quarter two
- Film video for website by January 1st
- Create Facebook Professional Page by end of quarter two

Develop a marketing budget – stick to it

- Advertising, listings in online directories, social media advertising
- Printed materials

Self-development plan

- Positive statements about my strengths and accomplishments
- Affirmations
- Start Meditation practice
- Share with accountability partner

<ul style="list-style-type: none"> <input type="checkbox"/> Mission Statement – Purpose, vision, objectives (from Business Plan) <input type="checkbox"/> Ideal client <ul style="list-style-type: none"> Any couple wanting to heal their relationship or desiring Discernment Counseling Committed to doing the work Able to pay full fee Fits in my schedule <input type="checkbox"/> Description of services <ul style="list-style-type: none"> 60 min couples therapy sessions 90 min couples therapy sessions 120 min Discernment Counseling sessions Day long intensive sessions 15 min free consultation calls <input type="checkbox"/> Market analysis, competition <ul style="list-style-type: none"> How many couples counselors are there in your area? What are clients looking for? <input type="checkbox"/> Pricing strategy <ul style="list-style-type: none"> What are your business expenses? How much profit do you need to live comfortably? How many visits can you reasonably do in a week/month? What fee is reasonable in your area? Set fees accordingly Raise fees annually <input type="checkbox"/> Establish measurable goals – <ul style="list-style-type: none"> Number of new referrals per month Conversion rate Number of actual visits per week/month Financial goals: monthly, annually 	<ul style="list-style-type: none"> <input type="checkbox"/> List of tactics (examples) Add expected date of completion <ul style="list-style-type: none"> Write elevator speech by September 1st Write scripts for first phone call and first email response by August 15th Adjust website for optimum SEO by October 1st Join case consult group by November 1st Schedule and complete coffee dates with ten therapists by end of quarter two Write article for local newspaper by October 1st Create script for video for website by end of quarter two Film video for website by January 1st Create Facebook Professional Page by end of quarter two <input type="checkbox"/> Develop a marketing budget – stick to it <ul style="list-style-type: none"> Advertising, listings in online directories, social media advertising Printed materials <input type="checkbox"/> Self-development plan <ul style="list-style-type: none"> Positive statements about my strengths and accomplishments Affirmations Start Meditation practice Share with accountability partner
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