

5 Ways to Cut the Clutter in Your Marketing Plan

It's 2019.5. Half of 2019 is already behind us, and it is time to review and assess your marketing and [business development plan](#) and its progress. The reality is, for some, a truer statement would be that it's time to take your plan out and dust it off. Fair warning, though: You may become frustrated and feel your self-worth slowly depleting after you realize that the many fantastic ideas and initiatives that you aimed to achieve haven't come to fruition – or even begun!

After you have finished your self-punishment, please understand this scenario is definitely more the norm than the anomaly. Ordinary happenings can and do take you away from your marketing plan every day, regardless of how creative it is or how well thought-out it may be. Give yourself a pass, dust yourself (and your plan) off, and aim to save your plan for the second half of the year.

Your first effort should be to cut your existing plan in half. Here are five tactics for doing just that.

Are You Two-stepping and Thereby Spinning Your Wheels?

Are you duplicating tactics, or could two similar tactics be combined? In other words, assess your plan to identify tactics that may involve using the same action steps and consider combining some of them. For example, if one of your business development tactics is to reconnect with contacts (at least one per week) in your network to discuss mutual referrals and another tactic is to commit to having lunch with at least one client a week to discuss their satisfaction level, combine these tactics into one. List both "categories" and rate them based on potential. (You can use a simple grading system like A, B and C, for example.)

- For the "contact" list, have any of them referred you before? Is their network a goldmine of your ideal clients?
- For the "client" list, how much work are you completing for them now? How's the relationship – does it need some nurturing?

Now, take your "A" list, which will have a mix of both, and plan your outreach of once a week, monthly or whatever your initial goal was. Think of it like diversifying your portfolio – you're combing two tactics while not completely neglecting one or the other. Keep in mind that some of your "A" ratings could be pushed down to a "B" and vice versa. Working your "A" list could very well be the one and only business development tactic that you need to undertake for the rest of the year and thus become your entire plan.



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Delete the “Pie in the Sky” Marketing Tactics

While a particular initiative seemed as if it would thoughtfully, creatively and magically come together and change the world as you know it (think of the “Mission Statement” scenario from *Jerry McGuire*), it may have been unrealistic to begin with. Unless you’re willing to make this particular tactic the only one in your plan and truly map it out by breaking it down into action steps, delete it and consider pushing it to next year. On your next go-around, spend more time determining *how* you would accomplish the tactic and not *why* you should accomplish it.

If It Causes You Dread, Delete It

A tell-tell sign that a tactic should be deleted from your marketing program is that you continually push it off, ignore it or find other things to do in its place. Leaving it in your plan will do nothing but cause frustration each time you review the plan for results and progress (and I don’t know why those of us in professional services continue to do this to ourselves).

For example, if you don’t naturally work a room or it’s hard for you to make small talk, stop going to those types of [networking events](#) – at the very least, consider the buddy system. If the thought of public speaking catapults you into “fight or flight” panic mode, don’t continue to agree to speak. Instead, offer your written subject-matter knowledge. There are *plenty* of other tactics and ideas to pursue that better align with your strengths, personality and principles. This is why the first question on my intake questionnaire, when designing marketing plans for service professionals, is “What do you *not* want to do?”

Don’t Have a Fixed Mindset about Your Marketing Plan

Your marketing and business development plan should be flexible, even to the point that a tactic can be abandoned if it isn’t working out as you hoped (and don’t feel guilty for deleting a tactic). The plan should be a “living” and working document that keeps you on track and guides you to your end goal – not one that is unrealistic, rigid and forceful. Many [things can change](#) throughout the course of implementing your plan, such as a target contact leaving a current position; your involvement in an association or trade group becoming more demanding; or another tactic flourishing and resulting in additional opportunities that need your attention!

Are You Double-dipping?

Review the list of associations or trade groups that you’re involved in. Are you involved in too many? Be honest with yourself about the return you’re getting for your time. For example:

- Are things consistently “popping up” that keep you from attending meetings? ☐
- Did you join because it looks good on your bio and résumé, but you can’t name more than two fellow members? ☐

If you answered affirmatively to both questions, then remove yourself from this

association and take it off your plan. It was just “filler” anyway.

- Alternatively, has the association, and your involvement, become too time-intensive? ☒
- Are you always the go-to volunteer for meetings, conferences, speaking, raffles, etc.? ☒

If that’s you, review your client and contact lists and determine the approximate percentage of new business, expanded business and referrals that have come from your participation. The numbers may shake out to show that you should continue with the same time commitment, or you may find that you need to pull back a little and respectfully say, “Thank you, but no.”

I know I sound like a broken record to my clients when I tell them to keep their business development playbooks as simple as possible, but I’m sticking to that advice. You have enough demands on your time (and we haven’t even approached the subject of work-life balance). Think of it like this: Your marketing activities should be like an app on your phone that constantly runs in the background.

You don’t have to have an overwhelming plan that itself is a full-time job – that’s unrealistic. Instead, hold yourself to one or two goals in your plan for the year; truly map them out on paper by breaking them down into action items that can each be completed in 15 minutes or less (so you can move on with your work/day).

I also highly recommend recruiting any assistance you can to help keep you on track, e.g., put deadlines for your action items and your goals on your assistant’s calendar and ask the assistant to keep you committed to completing your action items as they are due. Each completed action item will build on top of the previous ones, and before you know it, you’ve completed major strides toward your marketing goal that before seemed daunting. Let your plan run in the background, not run you!

If you need help with allocating time effectively to your marketing plan or other business development activities, contact me, [Glennie Green](mailto:ggreen@jaffepr.com), at ggreen@jaffepr.com.