



## Marketing Optimization Tasks

If you're up to it, theme your days:

**Monday:** Business Development/Marketing, Team Meeting, Goal Setting

**Tuesday, Wednesday, Thursday:** Clients, Meetings, Discovery Sessions, Lunches

**Friday:** Financial Review and Content Creation

**1st Month each Quarter:** Review and Follow Up with current or previous clients

**Last Month each Quarter:** Goal setting for next quarter

**Every Quarter:** Do a SWOT Analysis on your business and quarter end results

### DAILY TASKS

- Review your calendar for revenue generation activity
- Review your KPIs – did you hit yesterday's goal?
- Create Daily Sales Targets
- Meet with Team or at least assistant
- 90 minutes a day on business development activity
  - Follow up with prospects, prospect for new prospects, scheduling appointments, reach out to low hanging fruit, looking for speaking opportunities (smile and dial)
  - Post to social media (where your ideal client is gathering)
  - Complete your daily money capture spreadsheet

### WEEKLY TASKS

- Meet with members of your team to determine weekly focus and goals
- Complete Weekly Plan Sheet
- Review your calendar and ensure you have opportunities to create revenue
- Complete your Financial Management Day (review your numbers, results, record expenses, determine your weekly P & L)
- Determine your networking events for the week
- Write Your Blog and/or E-zine
- Determine weekly sales goals and pipeline to achieve
- Review your KPIs and strategize for weekly plan
- Complete your weekly marketing plan
- Spend at least 2 hours on content creation (4-6 hours if writing a book or creating a content-based product or curriculum)
- Complete your financial review of the week on Friday
- Ask yourself: what went well? What can I do better and differently next week?
- Review for client important dates – birthdays, anniversaries, etc. and send cards or handwritten notes (or better yet, make phone calls☺)



- Send a minimum 5 handwritten notes per week
- Make a minimum of 5 new contact calls each week (should come from networking, people you never followed up with, referrals, etc.)
- Check in with current clients via email or text message
- Update your KPI tracking report and share results with your team
- Review your customer service metrics

## MONTHLY TASKS

- Set your monthly goals during the last week of the previous month
- Record your previous month's results.
- Ensure all key milestones are on the calendar
- Apply for 5 – 10 speaking opportunities to showcase to your ideal clients and Centers of Influence
- Schedule monthly coffee, virtual coffee or lunch meetings with COIs
- Create your monthly marketing calendar (or review your yearlong one and adjust)
- Determine your monthly content calendar
- Ensure your profit and loss and cash flow analysis is complete by the 10<sup>th</sup> of the month
- Spend at least 8-16 hours on content creation
- Hold a minimum of 5-10 discovery sessions each month (depending on your current client load and your bandwidth for new clients)
- Check in on former clients to see how they are doing and what they may need help with
- Implement your direct mail marketing campaign
  - Warm letter, post card, printed newsletter
- Determine your monthly offer
- Submit press releases
- Review your customer service metrics
- Determine feasibility of introducing a new product or service offering
- Determine what personal/professional development events you'll attend in the next 90 days
- Hold a strategic planning session with your team

## QUARTERLY TASKS

- Complete an audit on the previous quarter's goals, effectiveness, etc
- Conduct a SWOT analysis
- Determine/Modify your quarterly goals based on the results of the previous quarter
- Ensure that your quarterly calendar is complete with all that must be done: emails, events, blog posts, speaking gigs, etc.
- Review your quarterly financial statements. What needs to change in the next quarter?
- Do an expense audit (of auto-bill transactions) have you used and do you need everything that you've been paying for in the last quarter?



- Check in on those who've purchased something from you a year ago to the quarter to see how they are doing and see how you can help.
- Pay quarterly tax estimates
- Determine what personal/professional development events you'll attend in the next 90 days
- Hold a strategic planning session with your team
- Complete your discovery session launch sequence for new subscribers to your marketing list

## ANNUAL TASKS

- Complete an audit on your previous year
- Review your operational budget
- Review your financial management statements
- Update/Prepare a new key messages document
- Survey to your list about their needs
- Prepare/ Review/ Update your 3-year strategic plan
- Schedule a strategic planning day with your entire team
- Review your brand (or family of brands) for cohesion, message, clarity and focus
- Determine your 12-month marketing calendar and when items are being launched/introduced
- Consider new offerings
- Review the success of your Irresistible Free Offer
- Provide feedback to team members and write performance appraisals
- Determine which events you will attend for your personal development
- Set your vacation for the year (in advance)
  - At least one day each month, 1 week each quarter should be down time