

Marketing and BD planning in a nutshell

Planning in the professions is always a challenge. This interactive session is designed for both those who are new to marketing and business development planning and to those who studied the subject with the CIM and need to get started in applying that knowledge in a professional partnership. It will also help those with specialist roles understand the broader marketing perspective.

**Beginners/
Intermediate
level**

Through exercises and discussion with other delegates, the session will provide confidence, motivation, new insights and ideas for those tasked with developing or implementing plans and achieving fee-earners buy in to their implementation. Delegates should leave the session with a clear plan for how they start or improve the planning in their firms.

The workshop qualifies for 3.5 hours CPD.

Topics covered

**Why choose PM
Forum training?
See overleaf...**

Introduction

- Why do we need plans? Why is planning in a partnership so tough?
- Starting points – the business plan and what to do if there isn't one
- Plans for marketing and plans for fee-earners

Fundamentals revisited

- Theory revisited – MacDonald, Maister and Mayson
- The difference between strategic and tactical
- Working through the marketing audit
- The value of research
- Effective goal setting
- Choosing appropriate strategies – Segmentation, positioning and targeting
- Brand, the promotional mix and campaigns (includes digital marketing)
- Budgets and time management
- Maintaining and monitoring progress

Particular points for the professions

- Working with inadequate data
- From silos to integration
- Managing the matrix
- Gaining fee-earner buy in and involvement
- Moving from marketing to selling and relationship management

Planning challenges

- Changing markets, competition and commoditisation
- International influences
- Leadership
- Motivational
- Integration
- Demonstrating ROI

What do you do now?

Summary – Confidence. Counsel. Contribution. Control

Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit www.pmforumglobal.com



Tuesday 20 February 2018

This half-day workshop takes place from 9.30 to 13.00 starting with a light breakfast.

To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per 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.

For information on other training workshop visit www.pmforum.co.uk/training

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**
- Only PM Forum members can attend events

Venue

tbc, Central London

Fees

First attendee	£225 + VAT
Second attendee	£215 + VAT
All subsequent attendees	£205 + 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: continental breakfast • mid-morning tea/coffee • folder 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.

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

Please enclose a cheque made payable to *Practice Management International LLP*
or 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: **PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**
Tel: 020 7786 9786 training@pmint.co.uk www.pmforum.co.uk

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