HOW TO MAKE PARTNER

THE GO-TO EXPERT

WORKBOOK

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ABOUT THIS COURSE

To progress your career in practice you need to move from being a great technician into someone who can be relied upon to win good quality work. To do that you will need to differentiate yourselves from your peers AND the more experienced members of your practice. Not an easy task! This course gives you a simple jargon-free step-by-step process to be seen as THE expert to call. By taking this course you will discover simple steps to build your profile, how to grow your reputation and differentiate yourself from the competition and win new business.

- The course contains 4 modules. Each module contains a video (which can be accessed from this workbook) with exercises to complete after each video. By the end of the course you will have:
- Created a business development plan which you are motivated and energised to implement
- Created the time and space to work a little on your business development plan every week
- Have the clarity and confidence to choose and monetise your niche or specialism
- Quick and easy-to-implement tactics to grow a network around you who will supply you with an easy-to-convert source of ideal client enquiries.
- The confidence and clarity to know what you are doing when it comes to business development.
- Know how to turn "coffees into instructions" when meeting members of your network
- How to progress an enquiry into a signed up new client without leaving business on the table

COURSE CONTENTS

Recommended reading for the course:

1. The Go-To Expert by H Townsend and J Baker
2. The Financial Times Guide To Business Networking by H Townsend

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MODULE 1: HOW TO CHOOSE AND MAKE YOURSELF IRRESISTIBLE TO YOUR IDEAL CLIENT

Watch the video: Module 1 – How to choose and make yourself irresistible to your ideal client **by clicking this link**

After you have watched the video add into your diary 2-3 hours per week over the next 3-4 weeks to complete this training course. Then complete the exercises in this workbook.

EXERCISE 1: Reason Why

Use this exercise to help you:

- **Identify your motivation and drivers for wanting to become the Go-To-Expert.**

The most important ingredient of being successful is to know and be able to articulate to everyone what you want from your business, your career and your life

Simon Chaplin, Owner of 'Pull Your Socks Up Simon' and author of '7 Savvy Stories'

There was a reason that you picked up the Go-To-Expert. As you go through the journey to become the Go-To-Expert, it's important that you have the clarity on your personal motivation to seek this status. It's this motivation that will keep you going through the tough times.

To find this clarity, ask yourself a series of 'why questions':

1. **Why is it important for me to become the Go-To-Expert?**

2. **Why is this answer important to me?**

3. **Why is this answer important to me?**

4. **Why is this answer important to me?**

5. **Continue asking this questions until you reach either of** these two answers:
    - **Just because**
    - **Well it's not really important to me**

When you have reached the Just because answer, you will have normally uncovered a key driver or motivator for you. If you reach the Well it's not really important to me, it's very likely that you've identified a reason, which your family, friends or others have given to you.

6. **Finish the sentence:**

    The reason why I want to become the Go-To-Expert is.....

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EXERCISE 2: Goal setting exercise

Use this exercise to help you:

- Set your personal, professional and business goals

1. Find a place to complete this exercise where you can relax and will not be disturbed. Before you start the exercise, do a brain dump of all the stuff that is going on in your head, which may distract you from thinking about your goals.
2. Close your eyes, and imagine you a watching a short video of you when you have achieved your goals.

Now, answer these questions:

- What is the date?
- What are you hearing?
- What have you achieved?
- What are you seeing?
- What are people saying about you?
- How do you feel or seem?

At this stage, don't be tempted to consider the 'how'. The 'why' and 'what' are more important.

Now turn these thoughts into measurable goals:

1. By this date

2. I will have achieved:

3. This can be evidenced by:

4. This is how it will help my organisation achieve it's goals:

5. Now you have decided on your goals, write them down so they are visible to you on a daily basis.

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EXERCISE 3: Client Portfolio Analysis

Write down a list of the clients you work with. Then rate each client for the following:

1. **How much you and your team enjoy working with them (high, medium, low)**
2. **How profitable they are for the firm (high, medium, low)**
3. **Write down what are the trends or commonalities between any client who ranks high or medium on how much you and your team enjoying working with them and how profitable they are.**

EXERCISE 4: Choose your niche

Use this exercise to help you:

- Do a competitor analysis
- Complete a marketplace trends analysis
- Narrow down your target market to just one sector or type of person.
- Write your marketing plan
- Write your Personal Positioning Statement

1. To help you draw up a short-list of potential niches you could adopt, do a search on the internet to find professionals with a similar skill set to you.
2. Write down all the sector specialisms and 'niches' you can find:

3. Which niches or specialisms are popular, and why?

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4. Now do a SWOT and STEEPLED analysis for your firm and its market place:

STRENGTHS	WEAKNESSES

OPPORTUNITIES	THREATS

SOCIAL	TECHNOLOGICAL
ECONOMIC	ETHICS
POLITICAL	LEGAL
ENVIRONMENTAL	DEMOGRAPHIC

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Now, jot down some thoughts to these questions:

1. **What type of clients or people do you love working with?**

2. **What kinds or clients or work do you find others in your firm (or outside of your firm) recommend you for?**

3. **What audiences, technical skills or types of clients do you already have credibility working with?**

4. **Which sectors or marketplaces do you have a strong, influential and supportive network?**

5. **What market places does the firm want to maintain or strengthen its presence?**

6. **Which sectors have a growing demand for your technical skill set?**

7. **What new skill sets, in your field, will there be increasing demand for?**

8. Which sectors do your competitors poorly serve?

9. Based on your answers to these questions, write down up to 3 potential niches for you to adopt:

1	
2	
3	

10. Out of these three potential niches, which one:

- Excites you the most?
- Is something you are already passionate about?

This is most likely to be the best fit for you to adopt as a niche.

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EXERCISE 5: Getting to know you

Use this exercise to help you:

- Do your market research
- Write your marketing plan

1. For your chosen niche, complete a STEEPLED analysis. Use the headings in the table to jot down everything you know about them, and how this impacts either them personally or how they run their business.

SOCIAL

- What are their typical hobbies?
- What do they do outside of work?
- What is their family/home situation?
- Where do they hang out 'online and offline'?
- Who do they tend to associate with?

TECHNOLOGICAL

- How is technology and potential new technology affecting how they do business and live their life?
- What technology challenges may they be wrestling them?
- How technology savvy are they?

ECONOMIC

- Likely earnings, now and for the future?
- What threats do they face to their business/ personal future prosperity?
- What are the barriers to growth either personally, professionally or for their business?

ETHICS

- What ethics do they live their life or run their business by?
- What are their typical or likely beliefs?
- What religion are they?
- How does this influence their personal or professional life?

POLITICAL

- What are their likely political beliefs?
- How will the proposed political agenda affect them personally or how they do business?

LEGAL

- What regulations affect how they do business or them personally?

ENVIRONMENTAL

- What environmental goals does the personal or business have?
- How are they limiting their impact on the environment?

DEMOGRAPHIC

- Type of person?
- Location?
- Typical age of person?
- Typical family size and type?

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To help you get to know your ideal client more complete the following tasks:

1. Sign up for a competitor's newsletter plus the newsletter of any ideal clients
2. Read and review the social media output of a competitor and your ideal clients
3. Book informational interviews with 2-5 clients or people representative of your ideal client. You may like to use these questions in your interview:
    a. What are the top 3 challenges you are working on right now in your business? How are they impacting what you do at an individual, functional and organisational level?
    b. What are the top 3 barriers to growth that you are facing right now?
    c. Given the benefit of hindsight, what do you wish someone had told you 1-2 years ago?
    d. What 3 ways is technology changing your marketplace, which may change the way you do business?
    e. What are the 3 biggest shifts in your marketplace, which may change the way you do business?
    f. At what point, or what would need to happen, for you to use the services of someone similar to me?
    g. What 3 things do you see as the biggest threat to you and your business's future success?
    h. If you were in my shoes, who else would you recommend I ask these questions to?

2. Based on your research: Why does your niche need or want to buy your services?

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EXERCISE 6: 5 Whys exercise

Use this exercise to help you:

- Identify your niche's Pain Points
- Shape your service proposition
- Write your marketing plan

Using your notes from the 'Getting to know you' exercise, answer these 'why' questions until you identify your niche's emotional Pain Points. i.e. the top motivational drivers for your niche to buy from you.

1. Why does your niche buy your services?

2. And, why is that?

3. And, why is that?

4. And, why is that?

5. And, why is that?

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EXERCISE 7: Pain points exercise

Use this exercise to help you:

- Write your marketing copy for your website
- Identify which are the most important Pain Points for your niche

1. Fill in the table (overleaf) all the reasons why your niche could want your services
2. Brainstorm what would happen if they don't do anything (i.e. don't work with you)
3. Brainstorm what would happen if they take action today and choose to work with you (i.e. do work with you)
4. Now speak to existing clients and potential clients and check your answers on the spreadsheet – which ones are the big reasons for working with you?

Reason why someone will want to work with you	Pain they will suffer if they do nothing about it	Benefit they will gain if they take action now
1		
2		
3		
4		
5		
6		
7		
8		

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EXERCISE 8: Create your Client Personas

For all of the research you have done so far on your ideal client, create between 1 and 4 Client Personas. These are fictionalised representations of your ideal client. You will use these to help focus the content you produce and the communications you put out into your firm and the external marketplace.

Use the Client Persona Template in the Membership Site to help you create your client personas.

MODULE 2: HOW TO BECOME THE FIRST PERSON PEOPLE THINK OF WHEN THEY HAVE WORK YOU WANT

Watch the video: Module 2 – How to become the first person people think of when they have work you want by clicking this link

After you have finished watching the videos, complete the following exercises.

EXERCISE 1: Credibility statements

Use this exercise to help you:

- Write marketing materials
- Construct your author credit and biographies
- Evidence your credibility in new business meetings

Your Credibility Statements typically are easily memorable, repeatable and normally short statements, which allow anyone talking about you to instantly, convey your credibility.

Gather together:

- Your CV
- The biography you or your firm has used on proposal documents
- Articles you have written or been quoted in which have been published in print or online
- Video clips or podcasts where you have been featured
- A list of all the industry events you have spoken at in the last 5 years
- Any testimonials you have received in the last 5 years
- The clients you have worked for in the last 5 years
- Typical and outstanding results you achieve for your clients.

Now, put yourself in your client's shoes and answer the following questions:

1. What quantitative and qualitative evidence have I got which proves that I am the Go-To-Expert?

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2. How can I demonstrate, through my experience and achievements, that I really know my stuff?

3. How can I show that I truly understand and relate to my target audience?

4. Now write between 5-10 Credibility Statements about you, and rank them by how strongly they demonstrate your credibility.

EXERCISE 2: Credibility stories

Use this exercise to help you:

- Write marketing materials
- Construct long biographies
- Evidence your credibility in new business meetings

Credibility Stories illustrate what you do, who you do it for and the results which you help your clients achieve. They are succinct and unlike most stories have no middle. You may have heard them being called war stories or sales stories.

1. For each of the services you want to offer your clients, think about examples of how you have helped a client to achieve a great result. Then answer the following questions:
   - What Pain Points was your client suffering?
   - How were these Pain Points impacting your client negatively?
   - How would you describe the work you did together in one short sentence?
   - What results did you achieve with this client?
   - How can you evidence that the client was really pleased with the work you did together?
2. Use the answers to these questions to write your Credibility Story.

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EXERCISE 3: Short and long bio exercise

Use this exercise to help you:

- Write your author credit, long and short biographies
- Write your LinkedIn summary and professional strapline

1. Gather together your sound bite, and from the previous 3 exercises, all your credibility statements, stories and relationship hooks.
2. To construct your author credit, take your sound bite, and add in 1-2 credibility statements. Link the sound bite and credibility statements with a relationship hook. e.g:

   Heather Townsend helps professionals become the Go- To-Expert. (sound bite) Unusually for someone with an Engineering Degree (relationship hook) she wrote the bestselling and award-winning book on networking, The FT Guide To Business Networking, and co-authored "How to make partner and still have a life' and 'The Go-To-Expert'. (credibility statement).

3. Your short bio will typically include 1-2 more credibility statements than your author credit.
4. Your long bio will have more relationship hooks, with more of 'your story' included, and potentially a credibility story.
5. Have a go at writing your bios and author credit:

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EXERCISE 4: Content plan business development

Use this exercise to help you:

- Build your content plan
- Increase your lead generation
- Increase your conversion rate

1. For each stage of the Business Development lifecycle – i.e. create it, convert it, cultivate it – answer these questions to identify the content you want to use, and how you will make it available, to grow your client portfolio.

Create it

- What questions or answers will your potential clients be looking for?
- What typical challenges do you solve for your clients?
- What topics are your clients interested in reading about or discussing?
- How will they find your content?
- How will they take the next step to get in contact with you?
- What content could you send in outbound campaigns to help motivate your prospects to meet with you?
- What information can you send to a prospect, or what activities can you do with them, to help stay in touch until they are ready to buy? (And would help emphasise your credibility?)

Convert it

- What typical objections will clients have when buying your services? What content can you use to help educate and overcome these objections?
- What will clients normally want to know before signing on the dotted line? What can you document and provide it to them before spending time with them?
- What content can you provide to help clients want to work with you – and 'get' the value of your proposition?
- What information can you send to a prospect to help stay in touch until they are ready to buy? (And would help emphasise your credibility?)

Cultivate it

- What content can you send to clients to help them achieve the desired impact through working with you?
- What content can you or your team use with clients, during the assignment, to help make the assignment easier for both parties to do? E.g. worksheets, tools, books, guides.
- What content can be sent to an existing client that would mbe interesting and valuable for them, to help keep your firm visible, but also help a client feel valued and important?

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- What content can be sent to a client to help educate them on the next step to work with you and your team after the current engagement has finished?
- How can you use content to help your existing and past clients introduce you to new clients?

2. Now plan what content, using our content plan template (below), you will produce when, and which channel you will share it via.

MONTH	1	2	3
GUIDES, REPORTS, WHITE PAPERS			
BLOG POSTS			
NEWSLETTER			
LINKEDIN			
TWITTER			
FACEBOOK			
INSTAGRAM			
OTHER			

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EXERCISE 5: LinkedIn profile

Review your LinkedIn profile using the 10-point profile checklist within the Progress To Partner Membership Site. What needs updating or needs to change? Put time in your diary to make the changes.

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EXERCISE 5: What can I post on LinkedIn for the next few weeks

Look back at all your notes on your ideal client. Then below jot down some ideas of things you could post on your LinkedIn newsfeed. For example, will you share a 'tip' on a Tuesday? Have a go at writing a few updates that you would be prepared to share on LinkedIn.

MODULE 3: HOW TO TURN YOUR NETWORK INTO A PREDICTABLE LEAD GENERATING MACHINE

Watch the video: **Module 3** – How to turn your network into a predictable lead generating machine by clicking this link

After you have finished watching the videos, complete the following exercises.

EXERCISE 1: Networking goals

Use this exercise to help you:

- Identify your networking goals
- Increase your focus and effectiveness when networking

A good way of helping you identify your networking goals is to finish this sentence:

I will use my network to ....

If you are struggling to identify your big goals, take a look at your results from the Goal Setting Exercise you did earlier in this course.

EXERCISE 2: Networking map

Use this exercise to help you:

- Identify who you need in your network to help you achieve your goals
- Increase your focus and effectiveness when networking

Step 1: Identify your goal:

Get a big piece of paper and in a box in the centre put one of your big career or business goals; e.g. generate £100k of new business in next 6 months. (Or use the space on page 28 included in this workbook.)

Step 2: Identify your hubs:

Now think of the types of people that could help you achieve this goal. For example, current clients, ex-clients, family, friends, bankers, accountants, etc. Who else can you think of? Draw a spoke from the centre for each type of person you can think of. Are there any of these hubs which should be sub-divided. For example, ex-colleagues may split down into ex-colleagues still in industry, ex-colleagues I trained with, ex-colleagues I really liked.

Step 3: Rank your hubs:

Not everyone is created equal. Look at your hubs: rank them by which of them are more likely to be able to help you achieve your goal?

Step 4: Find names:

Starting with your highest ranking hub, identify names of people you already know in this hub and add these to the diagram. Also add in positions where you know the person in that role who would be able to help you, even if you don't know them yet.

Step 5: Repeat for the next goal:

Now look at your Network Map. You should now start to see how you are connected to your contacts.

Have a look through your network, and answer the following questions:

- Who is currently well-placed to help me achieve my network goal? What help do I need from them?
- Where are there gaps in my network of the types of people who are well-placed to help me achieve my career and business goals?

Your Networking Map:

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Now fill in the following table to help you think about next steps to strengthen the effectiveness of your network:

WHO	WHAT HELP DO YOU NEED FROM THEM? WHAT WILL YOU DO TO GET THIS HELP?

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EXERCISE 3: Finding people

Use this exercise to help you:

- Identify who you need to add into your network to achieve your networking goals

1. **Go back to your earlier Network Map.**

   Who are the people who can help you achieve your business or career goals who are not yet on your map?

   At this stage, you may not know their name but know their company name and likely role. Or you may just know that you are looking out for someone who is well connected to your target market, and likely to be involved in these types of activities.

2. **Your task at this stage in the process of defining your networking strategy is to brainstorm and identify the following:**
   - Activities which will bring you into contact with A-listers and missing connections on your Network Map
   - Where you're A-listers may hang out – both online and offline

3. **Now, rank all the activities by which ones are most likely to help you bump into the people you need to add into your network.**

   Pick the top 3-5 activities to focus on, and add tasks or events in your diary to make sure that these happen.

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EXERCISE 4: Relationship plans for your A-listers

Use this exercise to help you:

- **Deepen relationships with your key contacts**
- **Key Account Management**
- **Generate the right results from key contacts in your network**
- **Focus on the right relationships**

For each of the key relationships identified in your Networking Map, prepare a relationship plan for them.

Relationship plan template:

NAME		LINKEDIN & TWITTER	
PHONE		WEBSITE	
EMAIL		ADDRESS	
ROLE		COMPANY	
FREQUENCY OF CONTACT			
CURRENT AND DESIRED RELATIONSHIP LEVEL (Out of 5)			
THEIR GOALS AND OBJECTIVES			
THEIR INTERESTS OUTSIDE OF WORK			
FAMILY SITUATION			
HOW CAN I HELP THEM?			
WHAT CONTENT DO THEY WELCOME ME SENDING THEM?			
RELATIONSHIP NEXT STEP			

EXERCISE 5: Deepening A-lister relationships

Use this exercise to help you:

- Deepen relationships with your key contacts
- Key Account Management
- Generate the right results from key contacts in your network
- Focus on the right relationships

1. Identify people in your network who you consider to be your A-listers or potential clients. Your relationship needs to be at least at level 3. At what level is the state of your relationship with them?
2. Who do you need to spend more time with to increase the level of trust and collaboration in the relationship?
3. Write a Relationship Plan for each A-lister, potential client and George in your network to help you move their relationship to a level 4 or 5.

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EXERCISE 6: Collaborate

Use this exercise to help you:

- Generate referrals via key relationships
- Decide who would be good people to collaborate with
- Identify ways to work with others for mutual benefit

1. Go through your Network Map, and pick out the top ten people for the following criteria:
    - Have a client base or network which matches the type of people you want to meet
    - Have the ability and willingness to introduce you to your ideal client
    - Are highly influential within your target market.
2. For these ten people, identify their relationship level.
3. For anyone who is a relationship level 3 or above, brainstorm ways you could help each other. (Use the table overleaf to help you record your thoughts). Now give yourself an action to timetable a meeting to discuss your ideas.
4. For anyone who is a relationship level 1 or 2, identify a Relationship Plan to bring your relationship level up to at least a level 3.

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NAME	REL. LEVEL	WAYS WE CAN HELP EACH OTHER

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EXERCISE 7: Educate

Use this exercise to help you:

- Identify signs that a potential client needs your services
- Educate your network to be able to spot good referrals for you

1. Brainstorm all the ways you know that you have probably uncovered a good prospect.
    - What signs are you picking up on?
    - Is it something about the size of their business?
    - The particular life stage a business is in?
    - The words, phrases or attitude of the business owner and/or employees?
    - The type of business they run?

2. Now choose the most likely signs that you use to identify a potential client. Translate these into easy ways that your network can spot these signs.

3. Once you have identified how you will get your network to spot referrals for you, what do you want them to now do as a result of spotting the referral for you? e.g.
    - Introduce you by email?
    - Give them your card?
    - Tell them a certain story before introducing you?
    - Get them to talk about their experiences working with you?

EXERCISE 8: Networking routine

Use this exercise to help you:

- Identify what you are going to do daily, weekly and monthly to achieve your networking goals

1. Read through all your notes and exercises from chapter 6
2. Collate all your action points and record them so you have identified your daily, weekly and monthly networking routine.

DAILY NETWORKING ROUTINE

WEEKLY NETWORKING ROUTINE

MONTHLY NETWORKING ROUTINE

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MODULE 4: CONVERTING PROSPECTS INTO CLIENTS: THE EASY WAY

Watch the video: Module 4 – Converting prospects into clients: The easy way by clicking this link

After you have finished watching the videos, complete the following exercises.

EXERCISE 1: Create your tactical marketing plan

Use this exercise to help you:

- Identify how many leads you need a month to achieve your billing or revenue targets
- Focus your marketing activities

1. To build your Tactical Marketing Plan you will need to know:
    - Your conversion rate for Leads to new clients expressed as a percentage
    - The average value of a new client assignment
    - Your revenue target.
2. These three figures then allow you to identify the number of leads you require; i.e.
    - Number of Leads = revenue target/(average value of new client assignment x conversion %)
3. The next stage to build your Tactical Marketing Plan is to decide on which channels you will use to generate the Leads you require; i.e. how many will come from:
    - Introducers
    - Your networking activities
    - Speaking at events
    - Running events
4. When you have identified where your Leads are planned to come from, you need to decide on the action you will take to generate the Leads from each channel.

    To improve the accuracy of your Tactical Marketing Plan you will need to:
    - Measure the number and quality of Leads coming through each channel
    - Compute the conversion rate for each channel
    - Adjust your Tactical Marketing Plan as you get more understanding about the ROI of each channel.
5. Use the template overleaf to write out your tactical market plan

CHANNEL	MONTH		MONTH		MONTH		MONTH	
	BUDGET	ACTUAL	BUDGET	ACTUAL	BUDGET	ACTUAL	BUDGET	ACTUAL
EXISTING CLIENTS								
NETWORKING GROUP A								
RELATIONSHIP A								
RELATIONSHIP B								
EMAIL								
LINKEDIN								
TWITTER								
...								

For all the activities you have identified in your tactical marketing plan diarise tasks into your diary to implement your tactical marketing plan. Consider whether you need to change or adapt your current or next ONE BIG FOCUS to be focused on business development.

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EXERCISE 2: Weighted Sales Pipeline

Use this exercise to help you:

- **Forecast likely future revenue and capacity required**
- **Plan levels of marketing activity to match capacity**

To build your weighted sales pipeline:

1. **Identify the typical stages in your sales pipeline, e.g.**

Initial enquiry	Enquiry qualified	Initial meeting and fact-find	Proposal submitted	Proposal accepted	Engagement letter signed	Start work with client	First invoice paid

2. **For each stage in the pipeline, allocate a conversion percentage. I.e. what percentage of proposals when submitted turn into new clients?**
3. **For every bit of potential new work you are aware of identify the sales pipeline stage, and estimate the likely value of the work and when you think the work is going to start.**
4. **Compute the weighted value of each job, by multiplying it's likely value by the conversion rate percentage.**
5. **Then use the weighted sales pipeline template overleaf to record this information. (See worked example on the next page)**

	START MONTH	LIKELY VALUE	PIPELINE STAGE	MONTH 1	MONTH 2	MONTH 3	MONTH 4
JOB A	**2**	**£20k**	**Proposal submitted (50% conversion)**		**£10k**		
JOB B	**3**	**£50k**	**Enquiry (10% conversion)**			**£5k**	
JOB C	**3**	**£100k**	**1st meeting (20% conversion)**			**£20k**	
JOB D	**1**	**£30k**	**1st invoice paid (100% conversion)**	**£30k**			
JOB E	**2**	**£10k**	**Proposal agreed (90% conversion)**		**£9k**		
JOB F	**2**	**£100k**	**Enquiry (10% conversion)**				**£10k**
TOTAL				**£30k**	**£19k**	**£25k**	**£10k**

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	START MONTH	LIKELY VALUE	PIPELINE STAGE	MONTH 1	MONTH 2	MONTH 3	MONTH 4

EXERCISE 3: What's the next step for all my potential pieces of new work?

For all the leads and prospects you identified in the "Weighted Sales Pipeline" exercise, identify what is the next step needed to progress each opportunity. Then put these actions into your diary.

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FINAL THOUGHTS

Well done for getting to the end of this self-study course. You should now have:

1. **Identified your niche or specialism and how you are going to differentiate yourself from your peers**
2. **Identified how to attract the right kind of opportunities and clients for you and your firm**
3. **A networking plan to increase your profile and increase the number of referrals you get through your network**
4. **A tactical marketing plan to identify what marketing activities you are going to do when to get the right amount of leads you require to hit your targets**
5. **A list of all your known leads with diarised action points to progress these leads**

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