FOUR STEP CONSULTING SERVICES CHECK LIST

(1) Business Goals

(2) Marketing Goals

(3) Items to Move the Needle

(4) Marketing Activates to Reach Goals

(5) Budget / Staffing / Outsourcing

(6) Brand Building & Valuation

(7) Data Capture Plan for Improved Performance Measurements

(8) YTD Performance Status

(1) Business Goals

$XXMM+ X% share and grow 5x to $XXMM 5% share of $XB market

Geography: current vs plan

Product volume: current vs plan

Employees & Customers: XX employees serving XX clients and XXX+ end users

Y1 & Y3 Growth: X% or $X

Retention X% or $X
New on-boarding: X% or $X
Trans # from X to Y
Trans $ avg from X to Y

Trans frequency from X to Y per Z

Total revenue growth X% or $X

(2) Marketing Goals

- Support aggressive business development plan

- Lead appropriate reinvestments in the business

- Adapt flexible business model as needed

- Lead appropriate marketing structure and internal/external communications

(3) Items to Move the Needle

- Content Marketing. Leverage brand message and reach beyond C-Suite stakeholders to 200,000 end-users, prospective customers, media and investors

- CRM: Internal database + channel partner sync + sync

- Internal/External communications for sales, branding, PR, IR, State of Business

(4) Marketing Activities to Reach Goals

Content Marketing. Blog, case studies, press releases, etc + measurement metrics

Salesforce.com CRM + Dashboard performance reporting + demonstrate ROI

Editorial calendar with flexibility to adapt communications to business demands

(5) Budget / Staffing / Outsourcing

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