

## Marketing Administrator | Learning Objectives and Assessment tasks

Area	Module	Learning objectives	Assessment tasks
1	Key marketing strategies for accounting and advisory firms	<ol style="list-style-type: none"> <li>1. Understand key principles for growth in professional service firms</li> <li>2. Document the strategies that your firm currently uses to engage with current and prospective clients</li> <li>3. Explore your role in delivering these outcomes</li> </ol>	<ol style="list-style-type: none"> <li>1. Does your firm have a marketing plan? If so, critically review the key elements of the marketing plan and provide feedback to your manager. Consider (a) overall strategy for growth, (b) key metrics for growth (KPIs), (c) specific projects or tasks outlined and (c) measurement and reporting process</li> <li>2. Take some time to identify tasks and responsibilities associated with the implementation of your firm's marketing strategy. Consider both internal and external resources. Who's involved? What is your role in bringing all the individual projects and tasks together?</li> <li>3. Based on the information presented in this module, outline the top 3 strategies for growth in your firm. Ask for feedback from your firm's leadership team if required. Consider the extent to which your firm drives actions in relation to these strategies. How can you better assist the firm?</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Document these actions in the consolidated action list provided.</li> </ol>
2	Marketing administration roles and responsibilities	<ol style="list-style-type: none"> <li>1. Understand what marketing means in relation to accounting and financial advisory firms</li> <li>2. Explore your current role and responsibilities</li> <li>3. Identify and address key challenges to being successful as a marketing administrator</li> </ol>	<ol style="list-style-type: none"> <li>1. Make a list of your marketing roles and responsibilities. Refer to your position description or other similar document if available.</li> <li>2. Critically review marketing tasks as outlined in slides 14 to 19. Identify who is responsible for which task within the firm. Are there any marketing tasks that you should consider that you are not already doing? Review your task list and update.</li> <li>3. Identify at least 1 key responsibility outlined in slide 22 that you already manage. Consider what you can do proactively to</li> </ol>

			<p>really take control of this responsibility from a strategic and operational perspective.</p> <p>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided.</p>
3	<b>Setting marketing goals</b>	<ol style="list-style-type: none"> <li>1. Understand the principles of setting and monitoring goals in relation to marketing activities</li> <li>2. Identify the marketing KPIs that are important for your firm's growth objectives</li> <li>3. Consider how to engage the team with business growth activities</li> </ol>	<ol style="list-style-type: none"> <li>1. Identify the core marketing goals that are in place for the firm at this time. Are these goals realistic? What could be done right now to improve the level of accountability for marketing results?</li> <li>2. Critically review the firm's process for regular review of marketing activities. Consider the type of reporting and the extent to which KPIs are reviewed on a regular basis.</li> <li>3. Identify 3 marketing goals that will help the firm to achieve its growth targets. Consider whether specific 'activity' targets are in place to achieve these goals. What needs to be considered? [for example, what needs to happen, specifically, to generate more referrals?]</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided.</li> </ol>
4	<b>Branding and positioning</b>	<ol style="list-style-type: none"> <li>1. Understand the key principles of branding and positioning as they apply to professional service firms</li> <li>2. Review your firm's value proposition in relation to resonance, differentiation and substantiation</li> <li>3. Consider how your firm's online presence creates and reflects its branding and positioning</li> </ol>	<ol style="list-style-type: none"> <li>1. Using the client profiling template provided with the support material, identify up to 3 key client profiles relevant to your firm. Ask your manager for feedback if required. Consider how your firm's marketing focuses on these profiles.</li> <li>2. Identify the things that differentiate your firm in relation to staff capabilities, service type and levels, industry focus and client profile. Do your firm's marketing activities support this differentiation?</li> </ol>

			<ol style="list-style-type: none"> <li>3. With reference to slides 28 and 36, identify up to 3 specific actions that your firm could take to improve your firm's branding and positioning. What is your potential role in this process?</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided.</li> </ol>
5	<b>Lead management strategies</b>	<ol style="list-style-type: none"> <li>1. Understand the key principles of effective lead management in professional firms</li> <li>2. Put in place a business development or sales pipeline for your firm</li> <li>3. Deal proactively with lead management issues in your firm</li> </ol>	<ol style="list-style-type: none"> <li>1. Document in a flowchart your firm's approach to lead management. Identify how information is recorded and who is responsible for follow-up. Compare with the 5 step process outlined in slides 12 to 16. What recommendations can you make to the firm?</li> <li>2. Review the challenges to effective lead management outlined in slide 22. Identify the top 3 challenges in your firm (you may want to speak with senior managers). Then put together a list of recommendations for the management team.</li> <li>3. With reference to the potential roles you can play in lead management (slide 33), identify the key actions that you could take to help the firm more effectively manage internal and external leads. Share this with your manager(s).</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided.</li> </ol>
6	<b>Marketing and social media</b>	<ol style="list-style-type: none"> <li>1. Understand the value of social media in driving engagement with prospects and clients</li> <li>2. Consider what steps you can take to drive social media activities within your firm</li> </ol>	<ol style="list-style-type: none"> <li>1. Critically review the LinkedIn profiles of all staff within the firm. What do these profiles say about the individuals and about the firm. Make recommendations for improving personal LinkedIn profiles.</li> <li>2. If your firm already has a Facebook page, identify key actions that you should take to improve the effectiveness of this page</li> </ol>

			<p>with reference to slide 26. If your firm does not have a Facebook page, put forward a proposal to the leadership team based on the information provided in this module.</p> <ol style="list-style-type: none"> <li>With reference to slide 32, identify key tasks that you already manage or should manage in relation to the firm's social media activities.</li> <li>Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided.</li> </ol>
7	Principles of Content Management	<ol style="list-style-type: none"> <li>Understand how to use content to educate, inform and entertain clients and prospects</li> <li>Explore techniques for writing great blog posts that create interest and engagement</li> </ol>	<ol style="list-style-type: none"> <li>Confirm roles and responsibilities for content management (ideas, writing, copywriting, delivery and reporting)</li> <li>Review your firm's approach to content management. Is your content relevant, up to date, engaging? Does it include a call to action where appropriate? What could be improved?</li> <li>Review your online marketing schedule. Are you posting content at an appropriate rate? Should you increase the frequency of your posts to improve engagement? Update your schedule.</li> <li>Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided.</li> </ol>
8	Event Management for Professional Firms	<ol style="list-style-type: none"> <li>Understand the role of different types of events in developing networks and client relationships</li> <li>Put in place an event management plan that will work for your firm</li> <li>Understand how to effectively engage clients and prospects in events</li> </ol>	<ol style="list-style-type: none"> <li>Review the last event your firm was involved with? What went well? What could be improved? [If you have not yet run events, then identify the key areas of future focus for your firm]</li> <li>Develop a checklist based on the 7 stages of event management outlined in this presentation.</li> <li>Develop a plan for an upcoming event. Identify (a) the topic and speaker(s), (b) the type of event, (c) the type of attendee,</li> </ol>

			<p>(d) the core marketing activities and (e) the desired objectives.</p> <p>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided</p>
9	Working with internal and external stakeholders	<ol style="list-style-type: none"> <li>1. Explore the options for the development and management of a marketing team in your firm</li> <li>2. Identify the key challenges and roadblocks to marketing activities. Explore potential solutions to these issues</li> </ol>	<ol style="list-style-type: none"> <li>1. Document the core marketing activities required to achieve the firm's growth goals. Who is responsible for these activities? Do you have an appropriate mix of internal stakeholders and external experts assisting you?</li> <li>2. Critically review the marketing challenges in your firm with reference to this presentation. What are the key issues you face in getting things done? What are some solutions to these issues?</li> <li>3. Document the process you have in place for regular review of marketing projects and outcomes. What could be improved?</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided</li> </ol>
10	Your firm's 12 month marketing plan	<ol style="list-style-type: none"> <li>1. Develop your firm's 12 month marketing plan for growth</li> <li>2. Develop a regular reporting and review process</li> <li>3. Identify and address challenges in implementing your firm's marketing plan</li> </ol>	<ol style="list-style-type: none"> <li>1. Critically review your firm's marketing plan. Does it incorporate all the elements outlined in this module? How often is this plan reviewed? What needs to change? [If your firm does not have a marketing plan, then outline a timeline for this project and discuss with the firm's management team.]</li> <li>2. Identify the top 5 marketing initiatives that you believe will drive the firm's growth over the next 3 years. Is there a clear project plan in place for each of these initiatives? If not, then outline a timeframe for completion of this task.</li> </ol>

			<ol style="list-style-type: none"> <li>3. If you haven't already done so, develop a monthly KPI report outlining activities and results associated with marketing activities. If you have a report in place, then consider what KPIs can be added to improve its value to the firm.</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided</li> </ol>
11	<b>Setting and managing expectations</b>	<ol style="list-style-type: none"> <li>1. Review the key stakeholders and their expectations in relation to marketing</li> <li>2. How to manage expectations through reports and meetings</li> <li>3. Identify what to do when expectations are not met</li> </ol>	<ol style="list-style-type: none"> <li>1. Review your firm's marketing activities over the past 12 months. What's worked well and why? What hasn't delivered the desired results and why? What can you do differently this year?</li> <li>2. Review your marketing KPI report. Does this accurately track the key activities and results that you're looking for? Is the report being actively reviewed on a regular basis? What could be improved?</li> <li>3. What actions could you take to improve the way that you manage the expectations of key stakeholders in the firm? Consider a regular review of marketing strategy, more active discussions about marketing activities and results, perhaps a review of marketing goals.</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided</li> </ol>
12	<b>Marketing challenges and solutions</b>	<ol style="list-style-type: none"> <li>1. Explore latest marketing research – what works for accounting and advisory firms</li> <li>2. Identify key marketing challenges for professional service firms</li> <li>3. Explore personal challenges and solutions in relation to implementation of marketing projects</li> </ol>	<ol style="list-style-type: none"> <li>1. Critically review the results of the Accounting Market Pulse Report discussed in this module. What messages are relevant for your firm? Are there any specific recommendations you'd like to make to the leadership team?</li> </ol>

			<ol style="list-style-type: none"> <li>2. Identify and review all KPIs you are using at the present time to gauge the effectiveness of your marketing activities. Are they appropriate? Should you be looking at other KPIs?</li> <li>3. With reference to the 10 key challenges outlined in this module, identify up to 3 challenges that affect your ability to do your job. What are some potential solutions to these challenges? Document and discuss with your manager.</li> <li>4. Document 3 SMART actions that you and/or your firm will implement as a result of this module. Add these actions to the consolidated action list provided</li> </ol>
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