

Table 1: Agenda and Framework for Monthly Marketing Meeting

What We Want to Achieve	Questions That Will Help Us Get There
To delight our clients enough that they are talking about our services to others	<ul style="list-style-type: none"> Which clients should we “surprise and delight” this month? Which clients have milestone events happening that we should recognize? What virtual webinar can we start planning for next quarter that is aligned with something that is top of mind for our clients? What is our next client appreciation event, and what action are we taking toward it now? What is one thing we could do for all of our clients this month that would reinforce our value to them (e.g., provide them with FAQs on COLA increases and contribution limit changes for next year)?
To show our value to COIs who serve the same clientele as us	<ul style="list-style-type: none"> Where is there an opportunity to provide value to one of our COIs this month (e.g., sharing critical tax information for a client you share)? What could I do this month to deepen the relationship with one of our COIs? What is one piece of content that I could share with a COI this month that would show our value?
To deepen brand awareness in our community	<ul style="list-style-type: none"> Who should we be contacting this month to help our brand become more visible with ideal clients (e.g., an editor of a publication)? Where might there be an opportunity to leverage a client or COI’s business (or hobby) to promote what we do (e.g., a client is hosting a charity function at their restaurant)? What opportunities are there to position myself as a thought leader this month (e.g., offering to speak at an event or hosting a “coffee chat” with a CPA)?
To create authentic content that educates and empowers our ideal clients and attracts ideal prospects	<ul style="list-style-type: none"> What are all the “challenges” that were mentioned by clients this month in meetings and conversations? What are the questions that clients asked us this month that might be on the minds of other clients like them? What are some ways in which we helped our clients solve problems this month? What is something that is really important for our ideal clients to know right now?

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