advantagy

PLANNING TEMPLATE · FILL IN WITH YOUR TEAM

# One-Page Marketing Plan

Firm: _____ Date: _____ Next review: _____

### 1 · TARGET CLIENT

Who exactly do you want more of? Example: tech employees, ages 50 to 62, within five years of retirement.

### 2 · WHY THEY CHOOSE US

One sentence a client could repeat to a friend.

### 3 · GROWTH GOAL

New clients this year · new recurring revenue.

### 4 · CHANNEL ONE: REFERRALS AND REVIEWS

Who asks, when, and how. Reviews follow the SEC Marketing Rule.

### 5 · CHANNEL TWO: BE FOUND

SEO, directories, or AI search. What will you publish each month?

### 6 · CHANNEL THREE: BUILD TRUST

COI partners, seminars, or webinars. How often?

### 7 · BUDGET AND OWNER

Cash per year · hours per week · who owns each channel.

### 8 · THREE 90-DAY MILESTONES

Dated and specific.

### 9 · WHAT WE WILL STOP DOING

Tactics that cost time without bringing clients.

**Benchmarks (Kitces Research, 2026):** typical firm spends 7.0% of revenue on marketing (2.2% cash + 4.8% time) · $2,551 per new client · $0.70 per $1 of new revenue · 8.4-month payback.

## 90-day calendar

Shade the weeks each item runs. Keep it to what your team can do.

| Week | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Positioning and message | | | | | | | | | | | | |
| Website and review program | | | | | | | | | | | | |
| Referral and review asks | | | | | | | | | | | | |
| COI outreach | | | | | | | | | | | | |
| Content / SEO | | | | | | | | | | | | |
| Event (seminar or webinar) | | | | | | | | | | | | |
| Review the numbers | | | | | | | | | | | | |
| _____ | | | | | | | | | | | | |
| _____ | | | | | | | | | | | | |

## Five-number scorecard

| Number | How to measure | 2026 benchmark | Day 30 | Day 60 | Day 90 |
|---|---|---|---|---|---|
| **New clients by source** | "How did you hear about us?" on every intake | 62% from referrals | | | |
| **Cost per new client** | Cash + hours × hourly value ÷ new clients | $2,551 | | | |
| **Cost per $1 of new revenue** | Total marketing cost ÷ new recurring revenue | $0.70 | | | |
| **Consultation requests** | Website forms and calls (GA4 + CRM) | Your month-one baseline | | | |
| **Payback period** | Months of fees to cover acquisition cost | 8.4 months | | | |

## Cost per $1 of new revenue, by tactic

| Tactic | Cost | Tactic | Cost |
|---|---|---|---|
| Reviews on your website | $0.13 | Online directories | $0.28 |
| Client referrals | $0.34 | SEO | $0.45 |
| COI referrals | $0.72 | In-person networking | $1.45 |
| Seminars | $1.76 | Webinars | $2.37 |
| AI search (AEO) | $3.45 | Newsletters | $4.14 |
| Client appreciation events | $4.54 | Social media | $4.88 |

Want help filling this in? Advantagy runs positioning workshops that turn this page into a full plan. Schedule a free consultation at advntgy.com.