Quarterly Marketing Activity Plan | 4Q 2016

**Prepared for:** [Advisor name]

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| TARGET/Niche Market | Quarterly Goals | |
| [Include description of niche market here] | 1. Number of COI referral activities: X 2. Number of client referral activities: X 3. Number of networking events: X 4. Number of workshops/presentations/speaking engagements: X 5. Number of blogs/articles: X |

|  |  |
| --- | --- |
| Targets | |
| **Target COIs for referrals** | [Include names of 12–24 people] |
| **Target clients for referrals** | [Include names of 12–24 people] |
| **Target networking groups** | [Include 3 to 7 groups] |

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| --- | --- | --- | --- |
| Quarterly Marketing Activity CALENDAR | | | |
|  | **October** | **November** | **December** |
| **Center of influence  referral activities** | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] |
| **Client referral activities** | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] |
| **Networking activities** | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] | [Activity]: [Name] [Date]  [Activity]: [Name] [Date] |
| **Public events (e.g., workshops/ presentations/speaking engagements)** | [Event]: [Topic] [Date] | [Event]: [Topic] [Date] | [Event]: [Topic] [Date] |
| **Blogs/articles** | [Publication]: [Title] [Date] | [Publication]: [Title] [Date] | [Publication]: [Title] [Date] |
| **Innovative idea** | [Idea] | [Idea] | [Idea] |