PSM MARKETING

2027 EDITION

2027

8-Step Marketing Planner

Build next year's marketing plan around The Four Pillars of Marketing™

I	II	III	IV
Retain and grow existing relationships	Develop new business	Increase name recognition and awareness	Measure return on investment

By PSM Marketing

psm-marketing.com

WELCOME

How to use this planner

A strong marketing plan for a professional services firm starts with the clients and referral sources you already have, then builds outward. This planner walks you through eight steps, from identifying your best contacts to a one-page action plan for 2027.

Set aside two or three focused hours. Work through the steps in order, since each one builds on the last, and invite the partners or leaders who will carry out the plan. Write directly on these pages, print them, or fill them in on your tablet.

BUILT ON THE FOUR PILLARS OF MARKETING™

The Four Pillars of Marketing™ began as Terrie Wheeler's MBA capstone project and has guided every PSM Marketing client plan since 1997. It organizes every marketing activity around four goals:

I	II	III	IV
Retain and grow existing relationships	Develop new business	Increase name recognition and awareness	Measure return on investment

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STEP 1 Identify your best contacts

List your top ten contacts in each category. These are the 20% of your contacts who deserve 80% of your marketing time.

	Current clients	Past clients	Referral sources
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

STEP 2 Define your ideal clients and referral sources

What do your very best clients have in common?

What do your most difficult clients have in common?

Who are your A-level referral sources? What type of person refers your best clients to you?

STEP 3

Clarify what makes you unique

Before you can tell clients why they should hire you, get clear on the value you bring.

What makes you unique as a professional?

What are your key “why you should hire me” messages?

Based on what you've heard from satisfied clients, what do they appreciate most about working with you?

- _____
- _____
- _____
- _____

What do you want clients to say about you when they refer you?

What expertise do you have that most professionals in your field don't?

STEP 4

Define your target audiences

Identify the specific types of clients, referral sources and industry groups most likely to value your expertise. Once you know who they are, you can plan to get in front of them consistently.

What industries do your clients and referral sources belong to?

Based on past clients, what types of clients or referral sources would you like to attract?

Which group of professionals sends you a steady stream of referrals?

Which publications, podcasts, newsletters and associations does your audience pay attention to?

List the key target audiences you'll market to in 2027 (client type, referral source type or industry):

- _____
- _____
- _____
- _____
- _____

STEP 5

Write your key messages

Clients need specifics. They want to know you've solved problems like theirs before. Use the answers from Step 3 to write representative experience for the work you most want to repeat, and aim for three or four examples for each key service area.

EXAMPLE 1

Type of client _____

Client's issue _____

Your approach _____

Result _____

EXAMPLE 2

Type of client _____

Client's issue _____

Your approach _____

Result _____

EXAMPLE 3

Type of client _____

Client's issue _____

Your approach _____

Result _____

STEP 5

Write your key messages (continued)

EXAMPLE 4

Type of client

Client's issue

Your approach

Result

EXAMPLE 5

Type of client

Client's issue

Your approach

Result

What messages set you apart from other professionals with similar practices? Why should a client hire you?

-
-
-
-
-

STEP 6

Set your marketing objectives

An objective is a specific, measurable goal. Set objectives in each of the Four Pillars, and for each one, ask:

- ✓ What exactly do you want to achieve?
- ✓ By when?
- ✓ How will you measure the result?
- ✓ How much time will it take?
- ✓ How much will it cost?

PILLAR I Retain and grow existing relationships

Client satisfaction

How will you make sure clients are satisfied with your work? Consider client feedback calls, surveys or end-of-matter check-ins.

Client service

How will you serve and communicate with clients: onboarding new clients, keeping them informed and responding promptly?

Cross-marketing

How will you offer more of your services to existing clients, or better explain everything your firm can do for them?

PILLAR I Retain and grow existing relationships (continued)

Referral source development

How many new referral sources would you like to develop, and in which industries?

PILLAR II Develop new business

Website and search visibility

How will prospective clients find you? Consider your website, SEO, Google Business Profile, and how AI tools like ChatGPT and Google's AI Overviews describe your firm.

Proposals and follow-up

How will you respond faster and more effectively when a prospective client asks about your services?

Trade and professional associations

Every professional should be active in at least one association that attracts prospective clients or referral sources. Which one, and what's your goal?

PILLAR III

Increase name recognition and awareness

Branding

Does your brand (logo, website, marketing materials) reflect the quality of your work? What would you improve?

Thought leadership

What will you write, publish or present to share your expertise: articles, blog posts, a newsletter or speaking engagements?

Public and media relations

What news, wins or expertise could earn coverage for you and your firm in 2027?

Social media

How will you use LinkedIn and other channels to stay visible to your target audiences?

Community involvement

How will your involvement in the community build your reputation in 2027?

PILLAR IV

Measure return on investment

Website and lead tracking

How many inquiries do you want from your website each month, and how will you track where every new client came from?

Search visibility

How will you track whether people can find you in search results and AI search tools for the services that matter most?

Email and social engagement

How often will you communicate with your audiences, and what engagement do you want to see?

Revenue growth

What revenue goal will you work toward in 2027? You'll build it out in Step 7.

STEP 7

Define your revenue goal

Set a total revenue goal for 2027, then break it down by service area or client so you can see where growth needs to come from.

Total 2027 revenue goal $ _____

Service area or client	2025 revenue	2026 revenue	2027 projected	Notes
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	
	$	$	$	

2027 total revenue goal
$ _____

−

2027 projected revenue
$ _____

=

New revenue needed to reach your goal
$ _____

Where will the new revenue come from? Which services, clients or referral sources?

STEP 8 Build your action plan

This is where the plan becomes real. For every objective you set in Step 6, ask:

- ✓ How committed are you: extremely, very or somewhat?
- ✓ What action will you take first?
- ✓ What else can you do?
- ✓ Who can help you get it done?

PILLAR I Your plan to retain and grow relationships

Five activities you'll do in support of your objectives:

1. _____
2. _____
3. _____
4. _____
5. _____

PILLAR II Your plan to develop new business

Five activities you'll do in support of your objectives:

1. _____
2. _____
3. _____
4. _____
5. _____

STEP 8 Build your action plan (continued)

PILLAR III Your plan to increase name recognition

Five activities you'll do in support of your objectives:

1 _____

2 _____

3 _____

4 _____

5 _____

PILLAR IV Your plan to measure ROI

Five activities you'll do in support of your objectives:

1 _____

2 _____

3 _____

4 _____

5 _____

Before you finish: put each activity on your 2027 calendar and give it one owner. If no one has time to own it, cut it or get outside help.

SUMMARY

Your 2027 plan on one page

Bring it all together. For each pillar, choose one goal, two tactics and one measure. Keep this page where you'll see it all year.

PILLAR	2027 GOAL	TACTIC 1	TACTIC 2	HOW WE'LL MEASURE IT
PILLAR I **Retain and grow existing relationships**				
PILLAR II **Develop new business**				
PILLAR III **Increase name recognition and awareness**				
PILLAR IV **Measure return on investment**				

FINISH YOUR PLAN BEFORE JANUARY

Early Nov.
Look back at 2026 results

Mid-Nov.
Complete Steps 1–6

Late Nov.
Set your revenue goal and budget

Early Dec.
Build your action calendar

Mid-Dec.
Assign an owner to every activity

PSM MARKETING

Want help turning your plan into results?

PSM Marketing is the outsourced marketing department for law firms and other professional services firms. Every engagement starts with a strategic marketing plan built on The Four Pillars of Marketing™, and PSM's team helps carry it out all year.

Book a free marketing assessment with Terrie Wheeler or Michelle Wheeler. You'll leave with ideas for 2027, whether or not we work together.

psm-marketing.com/contact

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