

## Gable Client Service Manual -- Sample Annual Spreadsheet IR and PR Guru

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b><u>Research</u></b>												
Business and marketing plan	x					x						x
Competition	x					x						x
Internal audit	x											x
External audit	x	x										x
E-clipping, industry tracking, breaking news	x	x	x	x	x	x	x	x	x	x	x	x
<b><u>Creative</u></b>												
Positioning, core values, future evidence	x	x			x			x			x	
<b><u>Targeting</u></b>												
Media, conferences, community, cause, etc.	x			x			x			x		
Editorial calendar targeting		x	x	x	x	x	x	x	x	x	x	x
Analyst tours, investment conferences	x	x	x	x	x				x	x	x	
<b><u>Strategic Planning</u></b>												
		x	x			x			x			x
<b><u>On-Line Creative</u></b>												
Web site enhancements ( media center, etc.)		x				x			x			
RSS Feeds, Blogs, E-Newsletter		x	x	x	x	x	x	x	x	x	x	x
<b><u>Media Relations</u></b>												
Media kit writing, distribution	x	x	x			x			x	x	x	
Media training		x	x									
Feature pitches			x	x	x	x	x	x	x	x	x	x
New product, service introductions			x			x			x			
Interviews			x	x	x	x	x	x	x	x	x	x
Media briefings				x	x	x	x	x	x	x	x	x
Quarterly op-ed pieces, trends, related				x			x			x		
By-lined articles, CEO, CTO, etc.					x	x	x	x	x	x	x	x
Customer testimonials, personality features						x			x			x
Focus editions (see separate schedule for detail)				x	x	x	x	x	x	x	x	x
<b><u>Investor Relations</u></b>												
Messaging strategy, annual plan												
Earnings releases, conference calls, Web casts	x			x			x			x		
Analyst education		x	x	x	x	x	x	x	x	x	x	x
Analyst tours (telephone; west coast; east coast)			x	x	x				x	x		
White papers, abstracts, data sheets (direct mail, email, RSS subscriptions)		x	x	x	x	x	x	x	x	x	x	
IP and New Product Briefing, On-Site (2-days)					x					x		
<b><u>Trade Relations</u></b>												
Conferences, speaking engagements, panels	x	x	x	x	x				x	x	x	