

Introduction

Nothing is more intimidating than the first time you are asked to put a marketing plan together – on your own, by yourself. If you are lucky, you will have someone else’s plan to refer to – or one that had been done by your predecessor. If you aren’t that fortunate, before you get yourself all twisted into a pretzel, take a deep breath. We might be able to help you.

In the simplest words, a plan is a roadmap. Good plans drive a company. It provides the direction, the instructions and the steps to get there. However, even now after writing more than 100 marketing plans in my career, I still take a deep breath when I’m tasked with developing a plan. To me, a plan together is never a mechanical process. I may follow a prescribed format, but putting the plan together shouldn’t be an automatic process or ‘esoteric’ in nature. By that I mean, if you have to explain your plan... start over. Oddly, it does have to be ‘predictive’ in its outcome. After all, why make a plan, unless you predict it will be successful.

Developing a plan explains why a course of action or actions will be successful and how you will measure that success. Your plan will set the direction for something – using a system. It will set expectations, objectives and milestones that are all critical to the plan’s success, or failure.

But before we jump into the traditional phases that are part of the standard "generic" planning process, let's stand back and minute and briefly look at the role of planning in its overall context.

It is more than an academic exercise -- understanding planning increases your prospects for success. Clarity is critical. This is a quick reference to help you understand the terminology, and the purpose of the phases that will help translate overarching objectives into a coherent plan from inception to implementation.

Overview

The following is an encapsulated, abridged, handbook on the essentials you need to start thinking about pulling together a marketing plan. This may be particularly useful if you are what I call “an accidental marketing manager” (formerly in administration and promoted into entry-level marketing management).

All Marketing Plans cover four basic elements:

The **Market Definition** describes the target market, audience, and competition.

The **Product Definition** describes the product (or the ‘offer’)

The **Communications Plan** describes the messages you will communicate, how you will deliver them to your target market, who is your target audience.

The **Budget** identifies what it will cost to execute the Plan.

Let's start with agreement on the terms. Include a glossary of any acronyms or jargon that is used in your document. Make sure there is clarity on definitions. Here are a few to start. It tells the reader what information they should expect to find under these headings. You may also want to access our [Marketing Glossary](#) located in the Library.

Corporate Mission Statement is a short, succinct statement declaring what business you're in and who your customer is.

Marketing Mission Statement should focus on the benefits you offer your customers, and how you plan to deliver on them.

Objective

An objective is what you want to achieve.

Strategy

A strategy is how you plan to achieve your objectives. It's a footprint to follow – step by step.

Tasks

Particularly in small organizations, people are assigned various tasks required to implement the plan. If the scope of the plan is very small, tasks and activities are often essentially the same.

Resources (and Budgets)

Resources include the people, materials, technologies, money, etc., required to implement the strategies or processes. The costs of these resources are often depicted in the form of a budget.

Marketing audit is a strategic action to review the effectiveness or efficiency of a particular marketing program, strategy or process. Your audit should examine the goals, policies and strategies of the marketing function as well as the methods of the organization and the personnel who carry out the goals, policies, and strategies of the marketing function.

SWOT Analysis looks at all aspects of a company to determine what are the internal strengths (S), weaknesses (W), opportunities (O), and threats (T) that will impact business. Called SWOT Analysis, this situational evaluation is a basic element used to make projections for the proposed marketing plan and related marketing activities that will be used to achieve objectives.

Assumptions

If you have any 'assumptions' about your clients, your market, your product – my advice is use this section to PROVE your assumptions. If you can't – then they probably are wrong.

Marketing plan details a company's marketing effort; aka action program, or marketing strategy. The marketing plan may be laid out for an individual product or for the entire company and all its products. In either case, the plan specifies the marketing goals and objectives to be achieved over a specific time period and then lays out the various strategies to be followed by achieving them. It will also set down the responsibilities for carrying out the plan.

Marketing strategy provides the broad marketing approach that will be used to meet the plan's objectives. You've decided you want to sell to a particular buyer, or occupy a particular niche in the marketplace – your marketing strategy should include every conceivable pathway to making that happen.

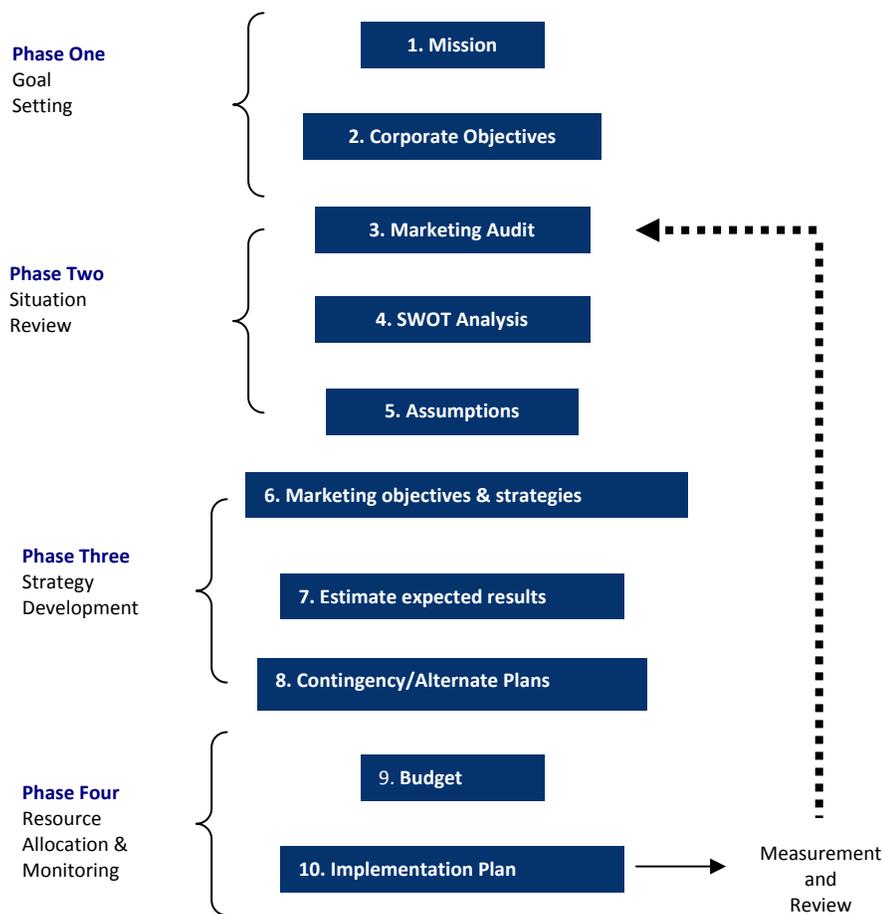
Marketing Mix is a combination of Product, Price, Promotion and Distribution initiatives and channels to communicate with the target audience.

Next steps in the marketing planning process

Let's look at where those terms are used in the development of a plan. Depending on your company, its size and its product, your business plan should be the written word to describe the brick and mortar of who you are, and where you want to go in the marketplace. Too often companies invest a lot of money in producing a business plan, and then don't follow it.

So, for your sake and sanity, make your plan achievable. Be realistic. That doesn't mean lose the vision – it means take stock of that vision and identify all the tools that will be needed to achieve it. More important, remember that a good plan needs to be so clear that anyone who picks up a copy can understand what business you're in, what are the business' objectives and how you plan on achieving them. It shouldn't be a mystery and certainly shouldn't require translation.

For brevity, I begin with the basic 10-step, 4-phase, process; you can add on as needed.



Now under the phases, you may want to include other information – but not sure what? The following list will give you suggestions. You might also want to use our [Generic Marketing Plan Outline Template, located in The Library](#).

Elements of A Marketing Plan

Executive Summary

Vision

Vision statement
Milestones

Market analysis

The overall market
Changes in the market
Market segments
Target market and customers
Customer characteristics
Customer needs
Customer buying decisions

Competitive analysis

Industry overview
Nature of competition
Changes in the industry
Primary competitors
Competitive products/services
Opportunities
Threats and risks

Strategy

Key competitive capabilities
Key competitive weaknesses
Strategy
Implementation strategy

Products/services

Product/service description
Positioning of products/services
Competitive evaluation of products/services
Future products/services

Marketing and sales

Marketing strategy
Sales tactics
Advertising
Promotions/incentives
Publicity
Trade shows

Operations

Key personnel
Organizational structure
Human resources plan
Product/service delivery
Customer service/support
Facilities

Financials of the business plan

Assumptions and comments
Starting balance sheet
Profit-and-loss projection
Cash flow projection
Balance sheet projection
Ratios and analyses

A DEEPER DIVE INTO YOUR PLAN

So now we want to take a deeper dive into how you go about developing your plan or roadmap. You will need to do an exploratory. What has been done, what has worked well, what was a complete failure and so on. The last thing you want to do is waste time reinventing the wheel, or replicating something that wasn't very successful just because it's familiar

Audit of Company Website
Update of existing Business Plan
Executive Team Biographies and Expertise
Clearly articulate your Philosophy and Vision
Review and update existing Marketing Plan and Marketing Initiatives (if any)

Knowing who your market is – your audience – is essential in developing any messaging. Be sure you understand who your prospect is, what are their pain points, and then make sure all positioning and promotional materials answers that fundamental question the customer will ask, which is “*why do I want this*”. Don’t expect them to ‘figure it out’... tell them – clearly.

Lastly, keep in mind that all communication needs to be spoken in the language of the intended audience. Use words that make sense *TO THEM*. If they need a glossary to figure out what you are talking about... you’re going to have a hard sell. Use acronyms as lightly as possible.

WHY YOU WANT AN INTEGRATED MARKETING COMMUNICATIONS PLAN (IMCP)

An integrated plan should identify and articulate all of the tactical elements you will be coordinating, across all the mediums you will be using: electronic, mobile, print, etc. The whole intent is to build and reinforce branding - look/feel/style/content delivery and so on in messaging and using visual pointers.

- ✚ Fine-tune and clearly define objectives and establish a consistent and compelling brand message, across all mediums.
- ✚ Explore marketing potential using white papers, testimonials, articles, etc.
- ✚ Email Campaign – determine the health of the mailing base, and explore external sources you can use, list rentals, etc. Scrub for accuracy.
- ✚ Look at all types of social media forums available, such as Linked In, Meet-Up, Facebook, etc. Decide which will be most effective for specific audience, crafting specific message to that audience, keep sites actively engaged through blogging, Q&A, etc. Set up groups, exploit Q&A features to drive interest, create presentations or introductions for posting and driving traffic.
- ✚ Define your target segments – identify unique selling proposition to those targets, using keywords that will be meaningful to them. Know who makes up your clients (client profiles).
- ✚ Define messaging to appropriate market segment (who is the listener).
- ✚ Evaluate Web effectiveness, incl. design, messaging, layout, etc., and how you can enhance its messages. What does it say about your company? Is it informative, intuitive and easy to use, designed for today, and planned for tomorrow, is it ready to speak for you, when you are not available.
- ✚ Identify the types collateral for web use, attachments, media kits, etc. (use cross-functional collateral matrix).

TAKE THE TIME TO CONDUCT AN EASY SITUATION ANALYSIS

Take a snapshot of the current organization, the marketing initiatives in support of your organization, and what are your key objectives.

Regardless of whether you are focusing on an end-user i.e., “Customer”, or internal-client, (department, division, segment), these are the kind of questions that need to be asked. These questions can be used to audit what the perception is – based on perspective. You can tailor these questions to get answers on how well your organization is providing the information that is needed and so on. If you are an agency - take on the client’s perspective.

What does the audience already know, feel and believe about the company?

What do they already know about the products and services ?

What do you know, feel, believe about your competition?

Who is your audience : internal or external

Why should this matter?

How will you communicate your message to your audience?

What type of marketing has been done? How well has it performed?

What is/are the most cost-effective means to get your message out there?

What are the most beneficial channels to get your message out there?

How does your marketing strategy lineup to business objectives and strategy?

Do you have the appropriate executive support and buy-in?

Is your organization properly funded to achieve the objectives?

What responses do you wish to evoke from audience?

What are the specific objectives?

What do you want to 'say', make them 'feel', about you?

What do you want them to 'believe', 'know', about you?

What are you offering? What do you want to convey? What do you want to dispel?

What are the results you expect?

Have you established a measurement for ROI? Who will evaluate results?

How do you plan measure these results?

How will you present the evaluation & results?

SPONSORSHIP AND/OR EVENT MANAGEMENT

Identify potential opportunities (regionally), leverage existing associations and alliances to socialize the messages. Look for speaking opportunities and co-marketing opportunities.

GRAPHIC DESIGN and PRODUCTION If you need to use existing materials, make sure branding is consistent:

- Convert any word documents into PDF format
- Sizing and Layout of text; standardize format and look/feel
- Use of fonts and existing graphics; standardize use and format
- Identify material that you can use for white papers on website
- Review other materials you can use for collateral development
- Get links to and from sites; refer and be referred
- Presentations and/or webinars, free content and materials for site

WEB SITE DEVELOPMENT AND CONTENT GENERATION

WEB Site Evaluation and Recommendations
Review current site and evaluate content relevance
Build out the content on web site
Evaluate usability - navigation - links/breaks
Site features and technology to support future enhancements
Categorize program offerings by target customer audience
Customer Logos (very strong customer references and list)
Gather/publish testimonials (updated), white paper content,
Clearly create the drivers - "Call To Action"
Consider a Blog or Messageboard
Web Metrics and Tracking
Leverage RSS feeds

Plan to have someone take a tour of the website - with an intent (to find something, or specifically look for something, to see whether it is a favorable user experience – before going live. Test, test, and test.

[You may want to visit our [web development section](#) for more information, templates and checklists.]

WEBINAR Is this kind of medium a good choice to get the message out there? Does one exist? How old is it? When was the last time it was updated? Is there an opportunity for other webinars.

DEMAND GENERATION RECOMMENDATIONS

Identify client resources and/or identify vendors for consideration

EMAIL SERVICES PROVIDERS

Google define an email service provider as company providing email services, an email service provider (ESP) offers email marketing or bulk email services. Google "Email Service Provider" and you will get lots of good information, or cut your search by going to MarketingProfs.com (<http://www.marketingprofs.com/bg/>). Most important is to find out what works best for you, your budget, your list. If you have an existing mailing list, seamless integration is essential.

NEWS RELEASES

Write and channel news releases to keep fresh
Recommend use of PRWeb or like organization

EMAIL NEWSLETTER AND MARKETING

Use email lists wisely

SPEAKING OPPORTUNITIES (Chamber of Commerce, Local Associations, etc.)

Press Releases

- Launch "new" biz
- Media interviews
- Professional profile
- Bi-lined articles

MARKETING COLLATERAL

White Papers, Presentations, Customer Case Studies or Testimonials, Flyers, Sample or Briefs Downloads ("try this")

At this time you also need to keep in mind other factors in developing your marketing plan. How will the information be used, what are your graphics and logo requirements, if you are a small company, who else is involved with developing the marketing plan or managing the company image?

1 – Employees need to understand the importance of marketing and branding on your business and they must have a clear understanding of the business objectives and their role in achieving it. Define marketing objectives clearly.

2 – In respect to “Branding” - all uses of the company logo, tagline, and any other corporate images should be spelled out in detail. The sooner you implement this, the better. Whoever creates your logo and designwork will provide you with exact properties (font, proportions of the logo, its approved colors (both in PMS and RGB)), that should be included along with how it is to be used, where and what requires approval and what’s prohibited. We jokingly used to call them “the logo police” however, it is extremely important to manage your company image and branding.

3 – Identify who is primarily responsible for developing the company marketing policy and branding going forward. Rather than tying it to a person – tie it to a function, i.e. the Director of Marketing, the VP of Marketing, the Director of Corporate Communications, etc. This function also manages your public, client, community and media relations as a part of managing your company identity and branding.

4 – Once the marketing plan is completed, consider creating an internal handbook for orienting your employees and ensuring a consistency in overall business presence and identity. For example, the Marketing Handbook can include policies and procedures, guidelines for logo use, organizational charts, presentation templates, brochure templates, glossaries, special customer visit forms, etc. Be sure to include a key contact list (who does what) so that if they need something out of the ordinary they need to check with the appropriate marketing personnel.

1. Focus

Mission, goals, priorities, expectations

2. Path Forward

Winning strategy, approach, who-what-when plans

3. Structure

Fits market, customers, mission, goals, strategy, job fit

4. Responsibilities

Clear, not overlapping, agreed to: people held accountable

5. Processes

Customer facing processes, mission critical management & work processes

6. Competencies

Knowledge and skills of managers, employees

7. Work Culture

Interactions between groups, norms about, control/freedom, decision-making, communications, conflict resolution, etc.

8. Feedback & Recognition

Feedback and suggestions from customers, employees, suppliers, partners, recognition for good work and results .