

How to Write a Winning Marketing Plan

By Jay Lipe

You know you need a marketing plan—but you don't know where to start. Or maybe you lack direction in your marketing efforts. Perhaps your competitor is eating your lunch.

Whatever the reason, a marketing plan will benefit you and your company several ways---better focus, a resource to guide your weekly marketing activities, a historical document to consult later for insight and a clearly stated roadmap of things you'll do to attain your goals. Plan on a marketing plan!

Your Marketing Roadmap

When you take a road trip in your car, what's the last thing you pack? Probably your roadmap. From this document, you'll scout out the destination, identify intermediate stops, plan which roads to take, and calculate arrival times. All the same principles apply to a marketing plan.

A marketing plan helps you identify your final destination (vision), plan intermediate stops along the way (goals), identify routes (marketing programs) and calculate arrival times (timelines). For you, a marketing plan is your road map to success!

Establish your mission

When traveling, you first choose your destination. Without knowing where to head, you won't have a successful trip, will you? Your first step in the marketing planning process then is to establish your mission. Start by brainstorming, with all key management personnel, the following questions:

- ⊙ What business are we in?

- ⊙ What products or services do we currently sell?

- ⦿ What geography does our company cover?
- ⦿ What benefits do our products/services provide to customers?

Then, when you crystallize the answers, compile them into a mission statement. It might look something like this:

“Emerge Marketing provides businesses with high-value marketing solutions using consulting services and printed training materials. These marketing solutions increase sales, boost profits, build market awareness, and enhance customer retention.”

Remember...your mission statement sets the tone for all other elements in your marketing plan. Spend a lot of time developing this, then distribute it to everyone in the company.

Pinpoint your strengths and weaknesses

When travel planning, you chose your destination, then you'll start planning which roads to use—and which to avoid. With marketing planning, you do the same thing. You evaluate what your business is, what your strengths are (the good roads), and your weaknesses (the bad roads). From this information, you can choose the best direction to head.

Now answer these questions:

1. What are our business strengths? What do our customers rave about?
2. What do we do better than our competitors?
3. What are our weaknesses?
4. What tasks do we procrastinate most on?

From your answers, a strategic profile of your business will emerge. You may find your business is driven primarily by word-of-mouth referrals. Or you'll find customers enjoy your service as much as your product. Maybe you realize that new products drive your business growth.

Whatever your strengths are, commit to making them more pronounced in your marketing. Develop separate action steps to address your weaknesses. But spend 70-80% of your time and \$'s on your strengths—they are what will get you to your destination fastest.

Your strengths form your positioning foundation and help distinguish your business from competitors.

Hone in on your target

The days of mass marketing are gone. Today's challenge lies in identifying, very specifically, those people most likely to buy from you (your target market). Marketing money must attract your target market's attention...or it's money poorly spent.

To hone in on your target, ask these questions:

1. Who are my best customers?
2. Why do they buy from me?
3. What common characteristics do all or most of my customers share?

A good target definition might be:

“Upper level executives of Fortune 500 companies, in the human resources area, who are dedicated to purchasing widgets from AAA certified vendors”.

Brainstorm ideas

Now that you know who buys from you and why, brainstorm ways to reach this target market. Exhibit at trade shows? Launch a direct mail campaign? Do market research? Roll out new products? Develop an alliance with another company? The choices are infinite; try to come up with at least 20.

Your ideas should come fast and furious. REMEMBER—at this stage, there are no right or wrong ideas. Every idea's a good one and should be recorded.

The exercise is designed to flesh all possibilities out into the open—not just the right ones.

Some rules for successful brainstorming:

1. There are no wrong ideas
2. Everyone must participate
3. Go for quantity...not quality of ideas
4. An outside facilitator often does the best job of integrating people and ideas.

ABC it!

A's are for tasks that need finalization within 90 days. B's are for tasks within 6 months. And C's are for tasks within one year.

Now, go through your 20 ideas and A, B, C each. If you're unsure of one's priority, skip it... then come back later. The key is to keep your rhythm going.

If you have more than 5 A's, 5 B's and 5 C's, you may find it helpful to further prioritize. You do this by prioritizing each A with a number between 1 and 5 (1 being the highest priority). The highest priority task then becomes A1. A2 is next, and so on down the line.

Once I asked my boss which of the 75 tasks on my to-do list were most important, and he answered "All of 'em". Hogwash! Don't you believe it either. Determine those *most* critical—and attack them first.

Grin and Grid it!

From there, you build a grid with each of the years' four quarters as the columns. Each task (A's grouped together, followed by B's, then

C's) occupies a row. Then, ask of task A1, "When must it be completed?" Plug that date into the timeline.

Once the date is plugged into your grid, plot all intermediate steps (i.e. print materials—12 weeks away, finish production—8 weeks away, develop copy—4 weeks away, etc) necessary to make that task happen.

After you finish the A's, turn to the B's and C's. This will complete the timeline section of the grid.

The human eye responds better to visuals than words. Put your marketing plan into a grid and your brain will more easily comprehend it.

Who's doing what?

Just as important as setting timelines is assigning accountabilities. People need to know what's on their plate! Add a column after the quarterly columns with the heading 'Project Leader'. Then for each task...assign a leader. This last step turns the grid into an action document that plans your activities and helps you follow up your efforts.

You now have a complete visual picture of your marketing effort over the next 12 months. This is the guts of your marketing plan. And because it's so important...may I suggest something else? Shrink down a copy and tape it up over your phone. You'll see it every day and your mind will plan accordingly.

Get others involved in your marketing plan...but hold them accountable. It's a very effective way to ensure task completion.

The need for Checkpoint Meetings

If your marketing plan incorporates the efforts of others, you'll want to schedule checkpoint meetings every 2-3 weeks. These are meetings where you go (painstakingly I might add) through your timeline, task by task. The reason? You want to 1) make sure things are getting done and 2) make sure everyone is held accountable for their to-dos. I sometimes refer to these as 'feet-to-the-fire' meetings because people must update the group on all tasks they lead.

For my clients, these sessions last 1.5 - 2 hours each and focus on the progress made against the timeline.

After a while, something else will start to happen in these meetings. You'll develop new ideas, you'll plot new strategic directions, and you'll brainstorm against problems. This process is a natural outgrowth of the marketing plan...and very valuable.

How many things happen by themselves in your company? Enough said—schedule checkpoint meetings!

Analysis...short of paralysis

As marketers, we work in a fluid field. A program that worked last year (or even last month) may fail miserably today. That's why analytical rigor is necessary. Analyzing each program's contribution to the overall marketing effort is key. We need to know what's working...and what isn't. From this analysis, you can make mid-course corrections in your marketing programs...before you ever get around to writing next year's plan.

Good questions here are:

- 1.** How many inquiries (orders, requests for literature, etc) did we get?
- 2.** How many did we expect to get?
- 3.** What other non-quantifiable benefits did we see?

(this is a wide-open field but could include penetrated a new market, were introduced to media contacts, found an alliance partner, discovered a new product idea, etc)

- 4.** Was this program a success?

As you complete programs, review them for lessons learned. These lessons are guaranteed to turn you into a better marketer.

Plan the work...then work the plan!

Even the best marketing plan means nothing unless it's implemented. The acid test of a marketing plan is how well it gets executed. Commit today to work your plan a set amount of time every week. I try to accomplish 1 task from my plan every week. You should too.

Understand that, like any new skill (golf, riding a bike), you'll face a steep learning curve. Practice, practice, practice. That's what gets you up the learning curve and helps build a knowledge base. In short, you need to develop your 'marketing muscles'.

If you don't have time to execute your plan, hire out this function. Hire a college kid, or a stay-at-home parent looking for something to do or hire an outside marketing professional. Whatever the method, you must execute your marketing plan so your name stays in front of prospects.

Profit from an executed marketing plan and you'll learn a host of new things about your business: what works, what doesn't, and where the business excels—to name a few.

Now get going on your marketing plan. You'll profit from a clear focus and action plans to build your business.

May your marketing emerge!

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For those extra credit types

What I've outlined here is not the definitive marketing plan outline. It is a simple outline that will help a company develop a marketing plan. If you're a larger company. Or you face a complex market. Or you're just anal—you may want to include sections like:

- 1) The Competition
- 2) Opportunities and threats
- 3) Positioning
- 4) Budgets
- 5) Many more.

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