



# Creating a Brilliant Marketing and Communications Strategic Plan



# Research and Data



- Acquire a proficient understanding of the company's brand, primary business objective, and products and services.
- Meet with team members across the organization to get their input on the brand and the audience. You'll discover new ideas, insights, and get buy in from others.
- Read surveys, review previous data and reports, look at stats from websites, emails, etc., conduct focus groups, and ask industry experts questions about their profession or consumers about their preferences.
- Create a SWOT analysis, which will outline recommendations to implement and where you should focus your efforts.

# Executive Summary



- Write a brief Executive Summary—an overview of the who, what, and why, and any major obstacles or challenges.
- Include a snapshot of your previous campaign, with top-line results and any unusual challenges you faced.

# Major Goals



- **Keep these high-level.**
- **Align with your company's mission and organizational goals.**
- **Include quantitative items that can be directly measured.**
- **Include (if appropriate) a select number of qualitative items. For example, more positive responses on surveys or feedback cards.**

# Key Strategies



- List high-level actions with short descriptions on how they will support the goals.
  - For example: Goal is to increase acquisition from prospects. Key strategy: Conduct focused outreach to previous customers who have not purchased our product in the past three years. Create special “comeback” offer to entice them to purchase again.
- Include both quantitative and qualitative activities.
- Organize by strategies the Marcom team will take on and a section of those that cross other departments.
- Include a special pricing discount or delivery offer if there is a major focus on that within the campaign strategy. Flash sales can be included in details of micro-campaigns.

# Audience



- List your target audience types.
- Organize by vertical industries, titles, demographics, regions, etc.
- Note who your primary targets are—where you want to put most of your resources. These targets will provide your highest profit margin.
- Consider growth markets/people and secondary audiences that will help you expand but will also require more resources to acquire.

# Positioning & Messaging



- This section is critical—spend time on it and collaborate with your colleagues to get ideas and buy in.
- Develop one power-packed, active positioning statement that describes your product and its unique selling proposition (USP).
- Articulate what makes your product different and better than the competition. It should be something no one else can claim.
- Think about the emotional connection or need your product is fulfilling. **HUMANS MAKE PURCHASING DECISIONS BASED ON EMOTIONS!**
- For each target audience, develop several statements that speak to “what’s in it for your audience.” Be consistent and repeat your messaging across multiple channels.
- Use keywords that each target audience would use while searching for solutions for their needs.

# Tactical Details



- This is the meat of your plan—lay out the various acquisition/revenue-driving tactics, many of which will require additional detailed planning.
- Organize tactics by major channels such as:
  - Direct mail and handouts
  - Digital (email, geofencing, advertising, social media, SEO, website layout and content, animation/infographics, remarketing, webinars, video, newsletters, online communities, blogs, etc.)
  - Voice (telemarketing, VM blasts, podcasts)
  - Stakeholders (board members, donors, ambassadors, staff, net promoters, partners)
  - Public relations/media engagement
  - In-person meetings (when life is semi-normal again) and networking
  - Purchased and traded lists and inbound leads
- Tailor the tactics to what makes sense for your organization based on data, research, audience preferences, budget, and staff bandwidth.
- Get help. Items such as SEO, paid search, remarketing, design, and more may require outside consultants or in-house specialists to ensure efficiency, enhanced impact, and better targeting and engagement.

# Tracking



- Don't make the mistake of setting and forgetting.
- Use UTM codes (special URLs that track a customer's journey when they click on a link). Each link to your landing pages can be unique and you can create short/redirect links for print pieces or where you want the URL to be visible vs. just embedded.
- Set up an account for your website in Google Analytics to track where your traffic is coming from.
- Work with a consultant or in-house expert to analyze your data and make more informed strategic decisions. Training and tutorials are also available if you wish to understand the complexities and benefits of Google Analytics.
- Review your email platform's performance metrics. Test email blasts to optimize time of day, day of week, subject lines, and content.
- Utilize the numerous ways to collect and analyze data on your campaigns. If time, money, or lack of knowledge is an obstacle, try at least to track your most used and expensive tactics to avoid wasting money and to optimize customer engagement!

# Timetable



- Time the campaign tactics to coordinate with your sales cycle and the customer journey—the interactions a customer has with your brand which include awareness, interest, purchase, retention, and then hopefully ambassador.
- Align your messaging and type of tactic with those journey points. Map out when each tactic will be deployed.
- Be prepared to adapt and change strategy as you monitor customer behavior and environmental factors (like a pandemic!).
- **COLLABORATE WITH TEAM MEMBERS.** The best plans involve using the expertise and gifts of your team, vendors, and other stakeholders. Note who takes lead on each tactic, supporting staff, and their roles (e.g., editing a brochure, analyzing data, collecting new leads).
- Graphically map the overall timetable to help communicate the big picture with leadership, which will increase your ability to get their support and resources you need.

# Reporting



- **When the campaign comes to an end, create a comprehensive report with the results to benchmark and compare for the next campaign cycle.**
- **Reports should include summaries, results, key findings, recommendations, and a SWOT analysis. Include raw data with explanations, show trends, and connect it all back to the goals.**
- **If you are reporting to a board or leadership team, create smaller ongoing reports and share high-level results and new initiatives.**
- **Often people don't realize how much work and resources go into a well-thought out strategic plan. It's important to communicate your initiatives—your professional value to your organization and the amount of support and resources you receive could depend on it!**

# Key Insights



- **Take the time to articulate your Unique Value Proposition.**
- **Collaborate with team members and stakeholders throughout the process.**
- **Know your audience—what language they use, what they care about, and what channels they use/visit.**
- **Stay up-to-date on emerging technology and apply it as appropriate.**
- **Take care of your brand! Be consistent with design and messaging. Pay attention to details—don't be sloppy or you'll look second rate.**
- **Use data and conduct research to inform decisions.**
- **Track, monitor, analyze, and be flexible.**
- **Make an investment to get expert help—whether that's a designer, writer, digital marketing specialist, or strategist. It will pay off with higher engagement and profits.**

# Want More Details or Help with Your Business?

Contact Dawn Crowe, MBA at [www.linkedin.com/in/dawncrowe](https://www.linkedin.com/in/dawncrowe)



With more than 20 years of experience in marketing and communications and an MBA degree, Dawn has developed expertise in creating and adapting strategic initiatives during rapidly changing circumstances and launching major initiatives.

With highly developed business acumen, she excels at integrating innovative technology and best practices throughout the organization to maximize financial efficiencies and opportunities for growth.

After viewing this tutorial, contact Dawn for more tips on implementing a strategic plan. She may even share a template or two with you!