

# Marketing Planning Simplified.

A Month by Month Guide  
to Creating Alignment and  
Achieving Your Goals



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## Table of Contents

<b>1</b>	Introduction
<b>2</b>	Alignment
<b>6</b>	Strategy
<b>7</b>	Execution
<b>9</b>	Measurement
<b>11</b>	Analysis
<b>12</b>	Adjustment
<b>13</b>	The Marketing Strategy Calendar
<b>14</b>	When You Can't Do It All

# ABOUT THE AUTHOR

*Cass (Oryl) Bailey is the president and CEO of Slice Communications.*

She believes that integrated public relations, social media, and email marketing efforts are critical for growing businesses looking to accomplish their business goals. Cass brings a wide variety of experiences to the communications strategies she develops for the firm's clients. With a background in international politics, economics, and philosophy, communications has become her passion and she has been tapped by various industry associations and the media to share her insights and experiences in the field. She is also the host and emcee for Mashable's Social Media Day in Philadelphia, one of the largest events of its type in the United States.



She is deeply involved with her community, serving as Marketing Communications Chair for both the Entrepreneurs Organization of Philadelphia and the Business Leadership Forum at The Union League of Philadelphia, Executive Committee Member of the Small Business Board at the Greater Philadelphia Chamber of Commerce, Chair Emerita of the Board for Tree House Books, and Secretary Emerita of the Board for Hopeworks 'N Camden. Cass graduated from The Catholic University of America with a degree in international politics, economics and philosophy.

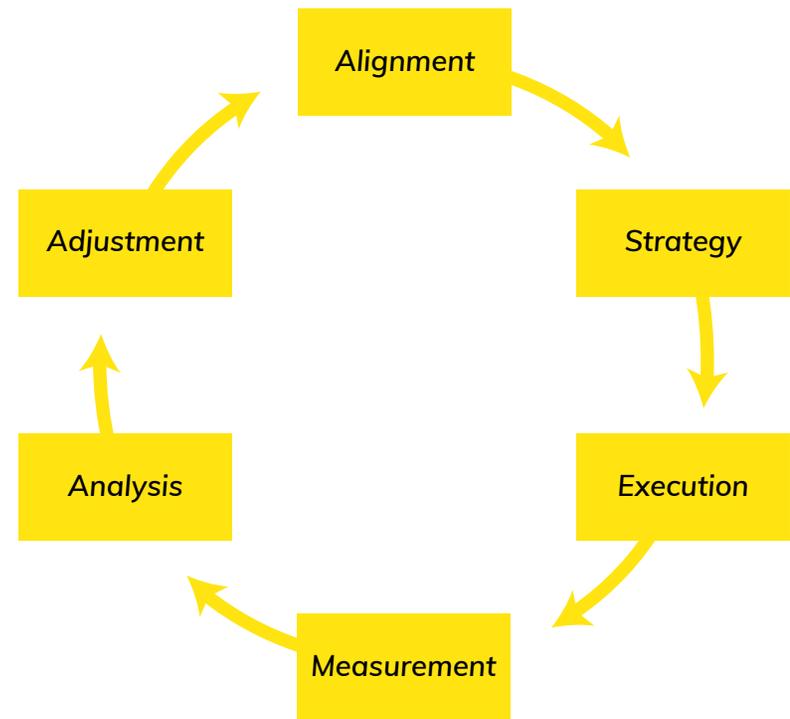
## *About Slice Communications*

Slice Communications exists to get people to pay attention to our clients. It is who we are as people, what gets us up in the morning, and what keeps us going. Since our founding, we have put our collective innate need for attention to work for our clients. We are proud that we have helped them achieve their business goals and grow strategically.

# INTRODUCTION

Few marketing and communications professionals have a strategic planning and execution routine. It's like diet and exercise - we all know we should do it, some have created good habits, and many of us have not. We all know that we should have a tempo, timeline, and a process for doing research, creating a strategy, executing the strategy, checking it regularly, adjusting it occasionally, and reviewing it thoroughly. We know that it will help us become better marketers, get bigger budgets, and show more value to our companies. We also face the reality of doing a million little things that aren't in the strategy while trying to keep up with all the changes in our industry.

That's why we developed this eBook. In it, you will find best practices, templates, calendars, and checklists that will help your entire marketing team create a plan and stick to it over the course of the year. Of course, some companies work on a three-year plan while others need to change course every six months. All these exercises, and more importantly the thinking behind them, will still be valuable as you work through the alignment, strategy, execution, measurement, analysis, and adjustment cycle.



Marketing communications is part art and part science. It is notoriously hard to know exactly what is working and what is not. But with a regular approach to setting and achieving goals, all marketers will have the opportunity to learn and grow.

# ALIGNMENT

Great marketing communications supports the growth of the company. However, many marketers do not take the time to understand what the company really needs to be successful in the next 12-18 months.

We have identified seven business goals that have been the most relevant for most businesses:

## *Brand Awareness*

More people know that you exist and will support you because you do.

## *Thought Leadership*

People know that you're smart about something that matters to them and will support you because you are.

## *Lead Generation*

People express an interest in buying from you or making a purchase.

## *Recruiting*

People know your business is great and apply to work for you.

## *Customer Service*

Customers feel great about supporting you and will continue to support you.

## *Community Relations*

People in your geographic region, industry, or peer groups know you, know that you value them, and support you.

## *Market Research*

People provide insights into what they think of you, your competitors, your industry, your product, and/or your service.

*So which one or two are the most important?  
That all depends on who you ask.*

# ALIGNMENT

All companies either follow a top-down or bottom-up methodology for setting priorities. Companies with a strong-willed CEO who is very involved in sales and marketing are often top-down. Companies led by servant-leaders who are more involved with finance, operations, or delivery are often bottom-up. Whatever the case, you need to figure out which one yours is.

Once you do that, you'll need to set up individual Alignment Meetings with the strategy stakeholders. Here are two examples and a worksheet you can use to outline your own approach to alignment.

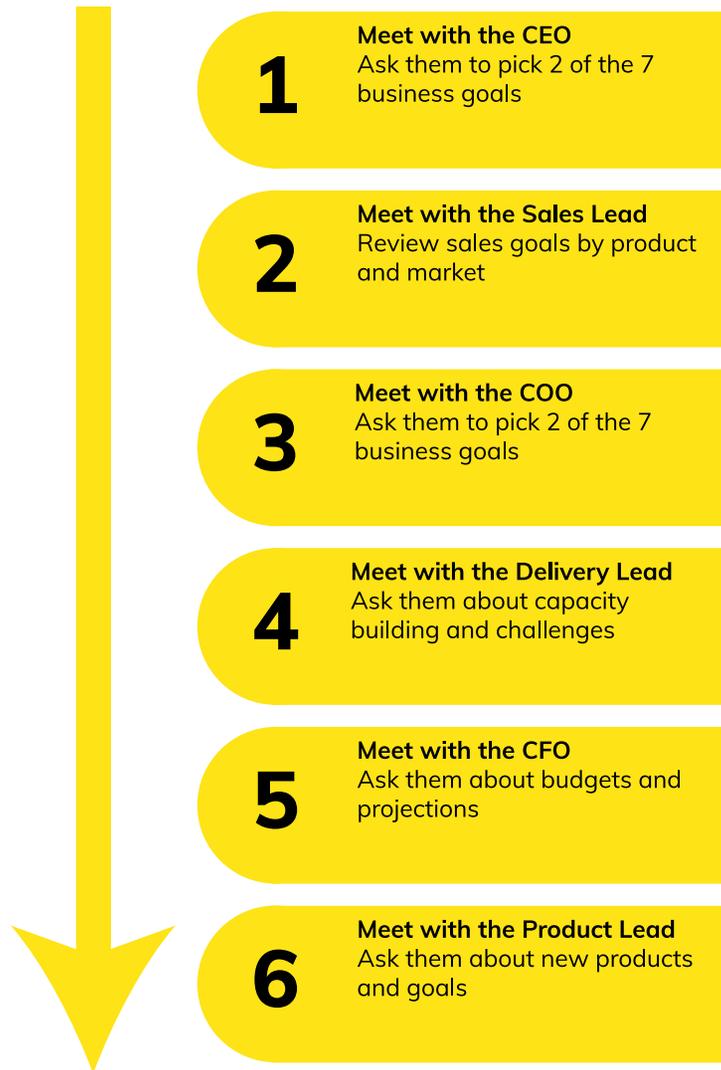
Once you have completed your Alignment Meetings - and they should all happen in a two-week period - it's time to do the research.

*How are you doing on these business goals right now? How have you done historically? Are there any data sources that you have that show that you've made progress towards these things? If not, what data sources do you need in the future.*

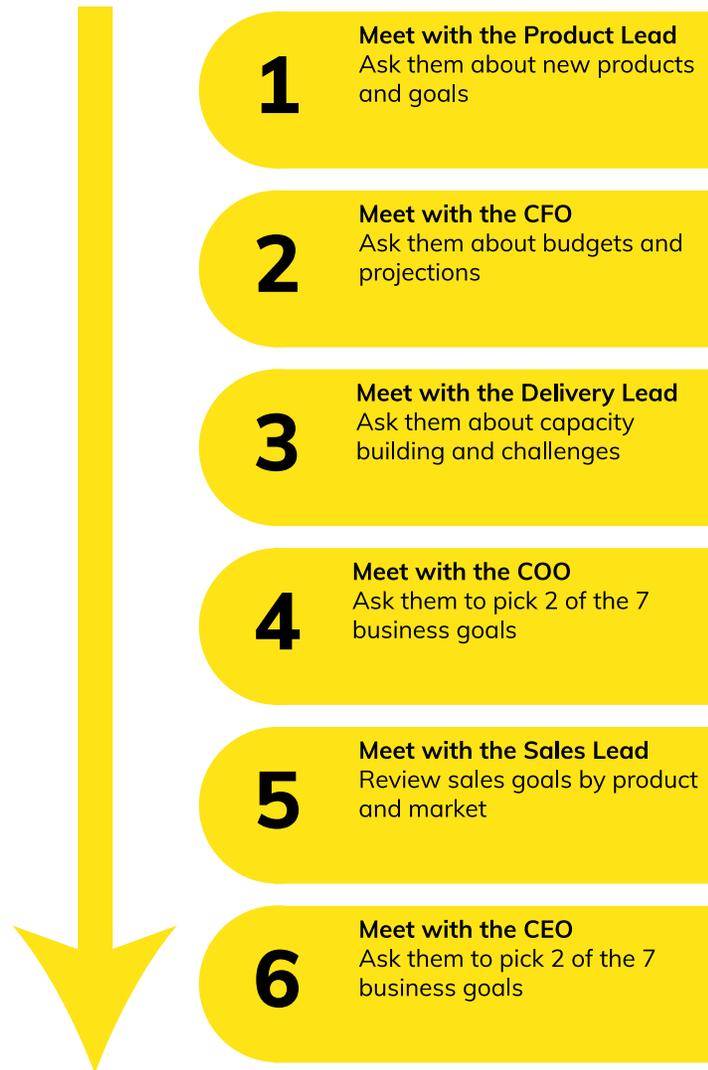
This research from past performance will ensure that you are keeping what works and leaving behind what doesn't.

# SAMPLE ALIGNMENT MEETING SCHEDULE

## Top-Down



## Bottom-Up



# SAMPLE ALIGNMENT MEETING WORKSHEET

<p><b>1st Meeting / Person:</b> <b>Because:</b></p> <p><b>Goal of the Meeting:</b> <b>Questions to Ask:</b></p> <p><b>Date / Time / Location:</b></p>	<p><b>4th Meeting / Person:</b> <b>Because:</b></p> <p><b>Goal of the Meeting:</b> <b>Questions to Ask:</b></p> <p><b>Date / Time / Location:</b></p>
<p><b>2nd Meeting / Person:</b> <b>Because:</b></p> <p><b>Goal of the Meeting:</b> <b>Questions to Ask:</b></p> <p><b>Date / Time / Location:</b></p>	<p><b>5th Meeting / Person:</b> <b>Because:</b></p> <p><b>Goal of the Meeting:</b> <b>Questions to Ask:</b></p> <p><b>Date / Time / Location:</b></p>
<p><b>3rd Meeting / Person:</b> <b>Because:</b></p> <p><b>Goal of the Meeting:</b> <b>Questions to Ask:</b></p> <p><b>Date / Time / Location:</b></p>	<p><b>6th Meeting / Person:</b> <b>Because:</b></p> <p><b>Goal of the Meeting:</b> <b>Questions to Ask:</b></p> <p><b>Date / Time / Location:</b></p>

# STRATEGY

There are many different approaches to developing a marketing communications strategy. Just Google the topic and millions of templates will be right at your fingertips. Whatever approach you use, know that leaders simplify, delegate, predict, systematize, and structure. A good strategy that can be executed will do all those things.

From a content perspective, we have found that the best strategies have these parts:

- Findings / Research
- Description of Priority Audiences
- What Success Looks Like (alignment around priority business goals)
- Measurable Marketing Communications Goals
- Messages and Content
- Tactics to Achieve the Goals (PR, social media, email marketing, events, advertising, SEO, etc.)
- Creative Campaigns (try something new)
- Standard Operating Procedures
- Assignment of Roles and Accountabilities
- Gut Check (will everything we're proposing actually help us achieve our business goals?)

The simpler it is, the better it will be understood by everyone involved. All the people that were interviewed in the alignment process should be presented the strategy and given an opportunity to provide additional insight. Those involved in execution should be as well. But as the marketing leader, you should have the final say.

# EXECUTION

Execution can take different forms depending on the business goals and the marketing strategy. There are three things that get in the way of successful execution:

**1.**

## *Lack of Clarity About Accountability*

Conflicts occur when people don't know their lanes or refuse to stay in them. We recommend that an Accountability Chart is created in the Roles and Accountabilities section of every strategy. If there are conflicts, this should help resolve them quickly.

**2.**

## *Lack of Capacity*

Too often, marketing people bite off more than they can chew. Do not be afraid to ask for more resources or reconsider priorities as execution is underway. We've also created a handy-dandy Agency Selection Organizer you can find at the end of this book if you need to add some outside help.

**3.**

## *Distractions*

Marketing people are often expected to do everything from writing proposals to planning baby showers to hosting team building events. Yes, we're great at a lot of things. But that can prevent us from doing what brings our companies the most value. Do not be afraid to say no. Or hire an intern.

# EXECUTION



# MEASUREMENT

Too often, marketing goals sit in a strategy never to be reviewed again. That's a disaster. Instead, we recommend a weekly scorecard. The scorecard will keep the team focused on the most important things that the entire company has decided are critical.

All the metrics should be weekly metrics. Let's say that one of your results goals is 10 inbound leads per month. Your weekly metric would be 2.5. If your quarterly goal is to post four new blogs, the weekly goal is .3. Go through every goal and set a metric that everyone agrees is both reasonable and somewhat aspirational.

This is where it is critical to have marketing measurement infrastructure in place. If you already have it, look at the past six months to identify the benchmark. Then add a certain percentage to the baseline to create the metric. The metric can be for the year (in which case you divide it by 52), half a year (divide by 26), a quarter (13), or a month (4). If you don't have data for a metric, use an educated guess. Then ensure you can measure it moving forward. If you cannot measure something, it is not a good goal.

Once you have the goals and the metrics, the last part is accountability. Each goal should be assigned to a person who will take accountability for achieving and reporting it. No, this does not mean that the person needs to do all the work themselves. But they are responsible for the outcome, either positive or negative.

*Ideally, you'll do most of this work during the strategy development process. But you'll look at the scorecard weekly in order to know what's working and what's not.*

# MEASUREMENT

Goal	Accountability	Timeframe
<b>Public Relations</b>		
2 New Pitches	KH	Monthly
4 Industry Placements	KH	Quarterly
2 Editorial Briefings	KH	Quarterly
<b>Social Media</b>		
100 New Followers Across Channels	AJ	Monthly
200,000 Social Media Impressions	AJ	Quarterly
<b>Email Marketing</b>		
150 New Email Subscribers	LM	Quarterly
20% Email Open Rate	LM	Quarterly
8% Email Click Through Rate	LM	Quarterly

# ANALYSIS

What makes one tactic, message, or campaign successful and another one an abject failure? It's hard to know. It could be the time of year, the wrong audience, or not enough investment.

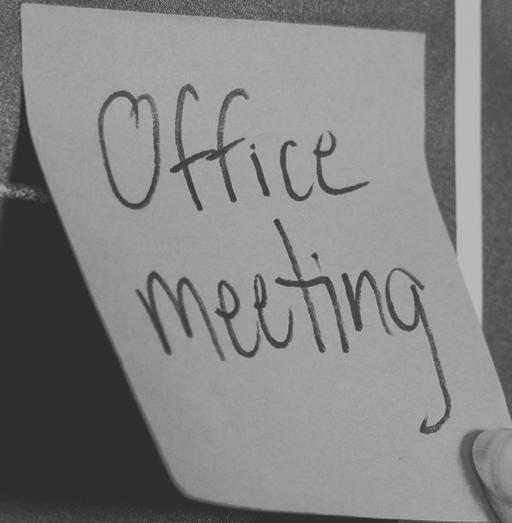
True analysis requires a tremendous amount of humility and self-awareness. Many businesspeople - not just marketers - have a lot of trouble with this.

**Analysis is not about blame. It is about learning.**

And if you ask Brene Brown, most learning comes from having the courage to be vulnerable. Analysis is about vulnerability.

As marketing people, what we do and how we do changes every day. Thanks, Facebook. And Twitter. And Google Analytics. And WordPress. And Microsoft. And Alexa. And how people generally interact with technology. And....

Since deep analysis takes a lot of courage, it cannot be done well every day. Or every month. Or every quarter. We need some distance. For that reason, we recommend a true review every six months or at the completion of a creative campaign. Any more than that, and we will likely make ourselves and everyone else around us crazy.



# ADJUSTMENT

Little adjustments can happen weekly in response to the scorecard. We should always be working to do better, get more media coverage, make our ads more compelling, make our blogs more interesting.

Big adjustments should occur no more than every six months following a thorough analysis and conversations with leadership.

Of course, we also need to be reactive to big changes in the company. A merger, bankruptcy of a major competitor, shift in the economy, production problems, personnel changes, etc. can all necessitate a major change in our strategy.

We need to be flexible enough to adjust to those things.

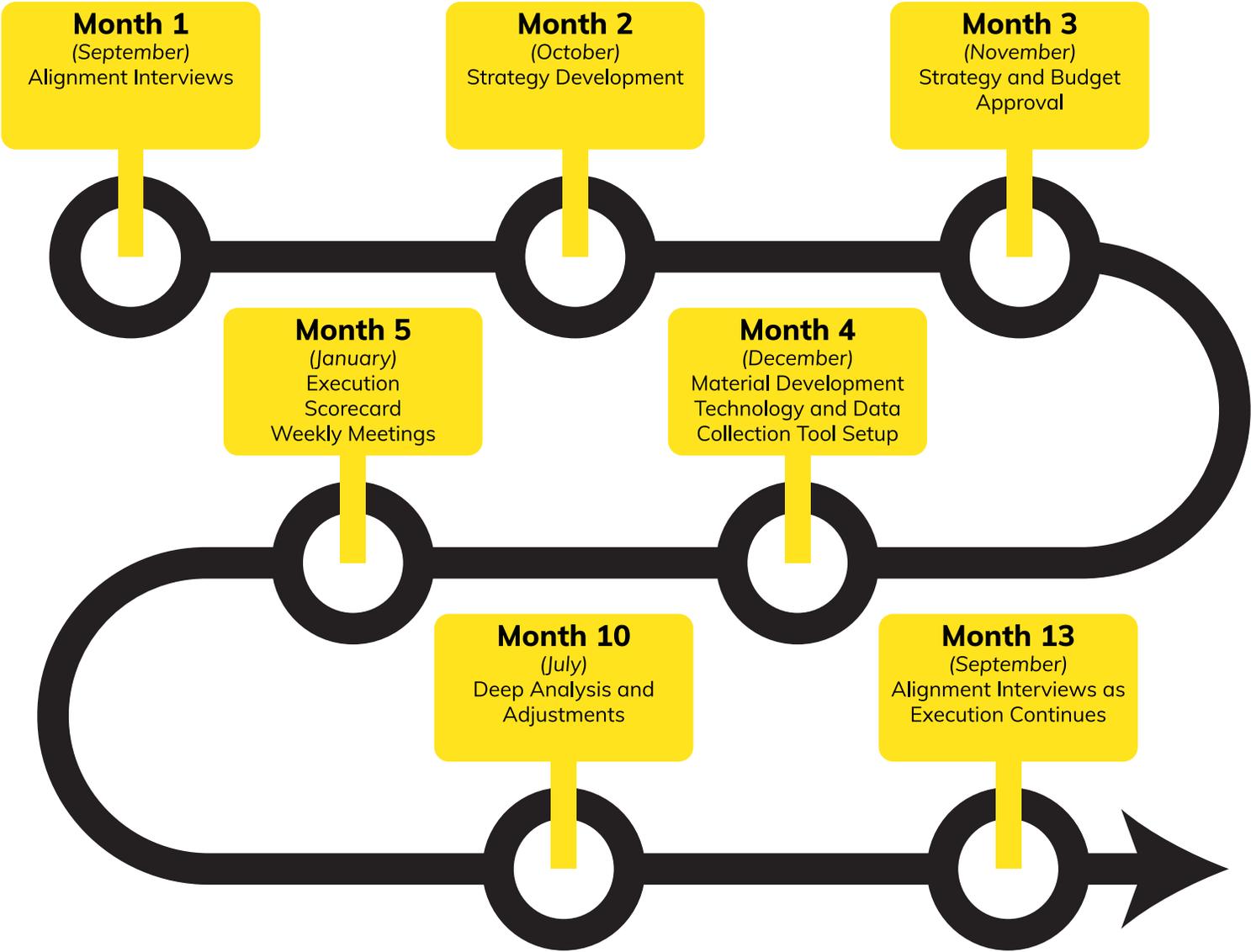
At the same time, we cannot be reactive. We've found that the best approach is to go into maintenance mode - focus on the basics of engaging your most important targeted audiences - while sorting out the new strategy and approach.

Never, ever go dark, even if it means outsourcing everything while putting all your effort into what's next for the company.



# MARKETING STRATEGY ROADMAP

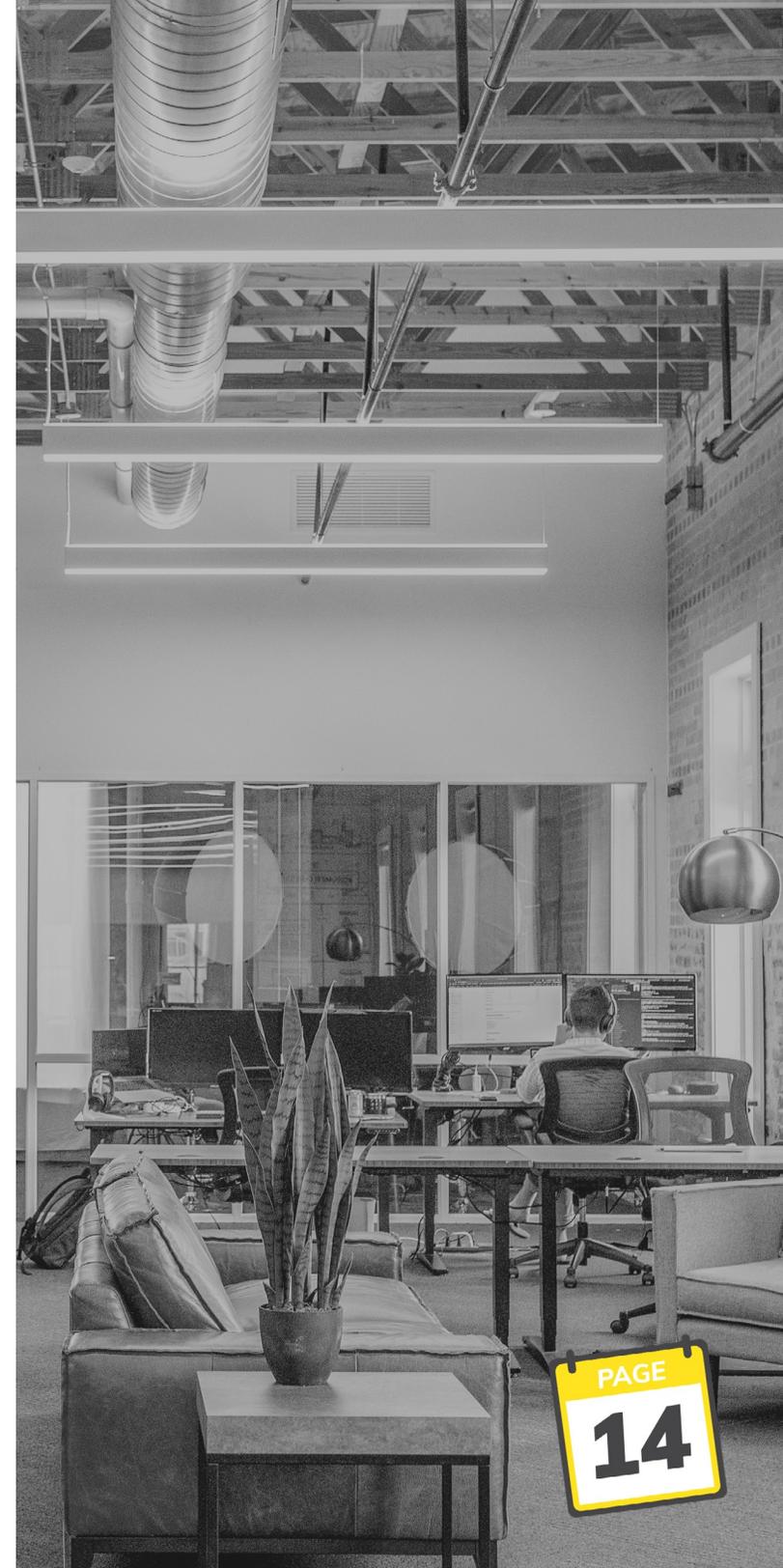
So what does it take to follow the marketing communications strategy cycle well? It looks something like this:



# WHEN YOU CAN'T DO IT ALL

There are times when you do not have the skills, capacity, or budget to get the job done internally. But how do you know whether an agency is right for you?

This Agency Selection Organizer will help you ask and answer the questions that are the most critical for selecting an agency that will help you achieve your marketing goals.



# AGENCY SELECTION ORGANIZER

## About the Company

Company Name:

About the Company:

Company Website:

Company Industry:

## About Your Audience

Our primary targeted audience is:

Other important audiences include:

Trade associations and groups include:

Competitors in our market include:

## Brand Guidelines and Marketing

We currently use the following marketing tools and technology:

Website CMS:

CRM:

Email Marketing:

Social Media:

Brand Guidelines:

## Services Required

Strategy  
Branding / Rebranding  
Web Development  
Marketing Collateral  
Advertising  
Public Relations / Media Relations  
Social Media  
Email Marketing  
Video Development  
Measurement & Analytics  
Market Research  
Media Buying  
Event Marketing  
Other:

# AGENCY SELECTION ORGANIZER

## Goals

We are looking for an agency partner to help us achieve these goals:

- Brand Awareness
- Thought Leadership
- Lead Generation
- Recruiting
- Market Research
- Community Relations
- Customer Service

## Immediate Opportunities

Our company has some immediate marketing priorities that include:

## Budget

Our total, inclusive budget for the marketing services listed, as well as out-of-pocket expenses, production costs, etc. is \_\_\_\_\_  
The budget is intended to cover \_\_\_\_\_ (timeframe).

## Evaluation

We will be evaluating an agency partner based on these criteria:

## Team

The team that will be working with the agency includes: