

Start Your Annual Tactical Marketing Planning Now

5 tips to help you construct an action-oriented marketing plan quickly

By Mike Gospe

If you haven't already started, now is the optimal time to start thinking about next year's marketing plan. It's tempting to stay unswervingly focused on Q4, waiting until December or even January to think about 2011. Unfortunately, companies that wait too long will find they have missed important business opportunities in Q1. These 5 tips for success will help you prepare a well-targeted tactical marketing plan for the future without taking your eye off of the Q4 goals.

1. Let your strategy drive your tactics and budget

A good marketing plan is more than just a budget that reflects last year's tactics. Instead, the process for crafting a winning tactical marketing plan starts with strategy discussions between the marketing and sales teams. Take time to confirm your business hypothesis: Who are your target customers? How can you best reach these customers and prospects? What information do they require prior to making a purchase decision? What type of leads, and how many, does the Sales team really need? Sometimes budgeting is confused with planning. It's an important element of the plan, but it should be the last step, not the first.

2. Follow a [streamlined outline](#)

If improperly managed, the preparation of a tactical marketing plan can become a cumbersome exercise that is more academic than tactical. We've seen carefully crafted plans that took months to complete left unread and gathering dust. Why? Because by the time the plan is finished, the information is out-of-date, or so much time has passed that the team was forced to move ahead without benefit of a completed plan.

A good tactical marketing plan doesn't have to be a "10 step" plan. Instead, you want to follow a pragmatic and streamlined outline. Not only will a tight outline help you accelerate the planning process, you will also find it easier to gain agreement and ensure widespread communication of your plan to the sales team. We recommend your tactical marketing plan outline include five elements:

- A **summary of primary marketing and sales goals and objectives** – Don't let your plan be a list of tactics. Begin with a clear objective that will guide all tactical decisions, such as: By the end of next year we will have increased sales by 17% in the US widget market.
- A **summary of your key marketing initiatives** that indicates and ranks target markets and your likelihood of success. For example: *Operations Managers in the manufacturing sector represents a new market for next year. Acting as a thought-leader, we want to educate them on trends shaping their business and how we can help them improve productivity levels and accelerate their time-to-market.*
- A **positioning statement** aimed at a specific [persona](#) or target market summarizing your product, the category you are competing in, key benefits, and your points of differentiation. Acting as your guide, the positioning statement will become the foundation for your messaging.
- A **6-month action plan**. Plot out a flow chart of the marketing activities and offers you will use to engage prospects in a dialog. An interactive, integrated [marketing blueprint](#) mapped to the prospect's buying cycle works best.
- A **budget** with realistic estimates of fixed and variable costs, and any related assumptions.

3. Make your plan action-oriented

A marketing plan is only as good as your ability to execute it. The best tactical marketing plans detail campaigns that are time-based, with expectations clearly set and communicated throughout marketing and sales teams. You'll be able to better measure success when you identify campaign leaders and launch managers and present a timeline of milestones for executing your plan. It will be tempting to list dozens of marketing activities. Don't. More does not mean better. It is better to be wildly successful in five activities that drive sales, than to attempt to undertake 50 and fail to provide any meaningful results.

4. Involve Sales and Channels

Don't build your plan in a vacuum. Instead, make your tactical marketing planning process cross-functional. A successful annual planning team, usually led by the CMO, involves sales and channels management as well as the functional marketing leaders and experts. Team-based planning will help you build a plan that will be executed effectively across the company. And it will ensure that the sales team gets what they need—not what the marketing team thinks they should have.

5. Augment your staff with a planning expert

To help CMOs and marketing teams stay focused on Q4, many companies hire a facilitator or planning expert to help them kickstart the planning process. Marketing operations and planning experts can bring the executive team together and guide them toward an agreement on the strategy and the identification of appropriate initiatives. By using a facilitator, many companies have cut their planning timeframe in half.

KickStart Alliance Makes Annual Planning Easy

We are experts who provide the templates, tools, and methodologies for the planning process. We have models that fit both start-ups and the Fortune 500, with planning processes that can yield results in a few months or less.

For more information on architecting annual integrated marketing plans, read [Marketing Campaign Development: What marketing executives need to know about architecting global integrated marketing campaigns.](#)

Why you should hire a planning expert

“Who has time for planning? I have a launch to execute, sales kickoff is right around the corner, and I have several business trips planned between now and January.”

While these are important activities, they shouldn't preclude getting ready for next year.

To help companies deliver a solid plan while tackling the demands of the day, many companies rely on marketing strategists and planning experts to augment their team. As you consider outsourcing this function, look for planning experts who bring solid value to your team.

- Planning experts know the process. Expect them to provide a methodology for uniting a cross-organizational/cross-functional team and helping you drive towards consensus.
- They should provide tailor-made templates to capture the information most important to you and your team.
- Look for planning consultants who can bring strategic expertise to your business and maintain a view of the big picture and challenge your assumptions and status quo.
- Expect and require them to have a roll-up-your-sleeves attitude and be able to jump in and help functional managers to create their own functional plans (that support the overall tactical marketing plan). The best planning experts have experience managing the tactics, too.

KickStart Articles To Guide Your Planning Efforts

The “Aha!” Factor

Positioning so your audience “gets it”

(<http://www.kickstartall.com/documents/KSAJAN2004.htm>)

Launching Solutions with Impact - Part #2

Ready, Aim, Fire!

(<http://www.kickstartall.com/documents/KSAapr2004.htm>)

Tips for Establishing a Lead Tracking Process—

Don't Start Your Campaign Without It!

(<http://www.kickstartall.com/documents/KSAmay2004.htm>)

About the Author:

Mike Gospe, author and integrated marketing strategist, has 25 years of marketing leadership experience helping companies to architect and implement effective marketing campaigns and plans. As a member of San Francisco State University's faculty, Mike teaches the course, Essentials of Integrated Marketing. He's authored a number of marketing- and sales-related articles, and his new book, “The Marketing High Ground”, will be published in 2011. “The Marketing High Ground” is a playbook for marketing practitioners, focused on creating and critiquing personas, positioning statements and messaging.

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