

5-Step Strategic Marketing Plan Development

For every client, Spaulding Communications (SC) recommends an annual strategic plan. Our plan process entails:

- **Dedicating** a minimum 6 weeks to complete
- **Collaboration** and frequent communication
- **Honest** discussions about strategy, budget, timing

FIVE-STEP PROCESS:

1. We Dive Into Your Business & Brand Ethos

We require at least two 2-3-hour discovery sessions with key executives and leadership (CEO or president; chief sales officer; chief marketing officer; chief product development officer and any other relevant executive) to understand:

- Brand, ethos, mission
- Value proposition and unique selling point(s)
- Business objectives, key business drivers and revenue goals
- Scheduled events, initiatives and/or product launches
- Go-to-market sales strategy
- Vision for future growth

2. We Validate and Benchmark with Customers and Competitors

This will provide us with the intelligence and opportunities needed for positioning and messaging. Step 2 includes:

Customer Interviews – We will conduct interviews with two customers to understand and validate:

- Why they select your brand over the competition
- How they view your brand
- How you may be able to provide more value to them in the future/what you can do better

Competitor Research – We will research your top two competitors to understand and validate:

- What their brand positioning and messaging is
- What their product mix & differentiation is
- What marketing activities they undertake

3. We Create and Deliver a 12-Month Strategic Plan

Every Plan includes:

- **A Situational Overview** that sets the foundation for the plan
- **Goals and Objectives** that need to be accomplished
 - Objectives will be SMART (Specific, Measurable, Achievable, Results-Focused, Time-bound)
- **A Strategic Approach** for achieving the goals and objectives
- **The Critical Audiences** we will be targeting
 - This would include a mix of editors, producers, influencers, analysts depending on need
- **The Key Messages** we will adhere for use in all marketing/PR efforts
- **A 12-Month Activation Timeline**
 - Tactics organized by month and/or quarter
 - Recommendation for frequency of client meetings and reporting
 - Recommendation for Plan Review
- **KPIs** to track and measure
- **An Annual Budget + the estimated OOPs expenses**

Note: The Plan may also include additional activities/services to be considered at a future date and a list of additional resources that might be needed, (e.g. media monitoring service, CRM platform, etc.)

4. We Present the Plan for Your Review and Input

We review the plan together (in person or virtually) to gain your feedback, then make any necessary changes.

5. We Finalize the Plan with a Contract

After Step 4 and gaining your feedback, we send the final plan and a contract that includes information about the start date, payment and cancellation terms, intellectual property rights, etc.