

5-Step Strategic Marketing Plan

Planning Foundation:

Before any specific steps are taken, we work with you to ensure we agree to the following:

- We dedicate an adequate amount of time (Min. 8 Weeks)
- We make the process collaborative and holistic (Schedule Weekly Status Meetings)
- We have open and reality-based conversations

STEP ONE: We Seek to Understand Your Business & Brand Ethos

We will schedule discovery sessions (min. 2) w/key executives and leadership to understand your:

- Business objectives, key business drivers and revenue goals
- Strengths, Weaknesses, Opportunities and Threats (SWOT)
- Brand mission and ethos
- Product and service offerings and go-to-market sales strategy
- Customer segments and customer personas/profiles

Leads to:

- Business Executive Summary
- Situation Analysis

STEP TWO: We Seek to Understand Your Customers and Competitors

We will schedule interviews with employees and your critical customers (min. 2 each) to:

- Gain further insights and benchmark against leadership input

We will research your top competitors (min. 2) to:

- Understand their product mix & differentiation, and their brand marketing positioning

Leads to:

- An Audience Matrix (If requested)
- Competitor Matrix (If requested)
- Key Message Architecture (Included in Plan)
- Strategies and Positioning Recommendations (Included in Plan)

STEP THREE: We Develop a Strategic Plan

We will develop a 12-month strategic marketing plan and budget born from Steps 1 and 2. The strategic plan will include:

- Executive Business Summary & Situational Analysis
- Brand Imperatives
- Overarching Marketing Goal (ex: Re-position Acme Windows as a premium provider of commercial window solutions vs. a price-driven leader by promoting its new suite of technologically innovative products)
- SMART Objectives: Specific, Measurable, Achievable, Results-Focused, Time-bound. (Example: Increase leads of Acme's X product by 10% by 12/31/22.)
- Target Audiences/Customer Matrix
- Key Messages (Key Message Architecture)
- Tactics
- 12-Month Timeline
- KPIs to Measure (part of SMART objectives)
- Recommended Budget & Estimated OOPs
- Any Additional Resources Needed

STEP FOUR: We Present the Plan for Your Review and Input

STEP FIVE: After Any Changes, We Finalize the Plan in Written Agreement

Deliverables: 12-Month Marketing Plan + Business Executive Summary + Key Messages

- **Additional Deliverables (if requested):** Audience Matrix, Customer Matrix