

## A QUICK GUIDE

# A STRONG MARKETING PLAN STARTS WITH THE LONG-RANGE VIEW.

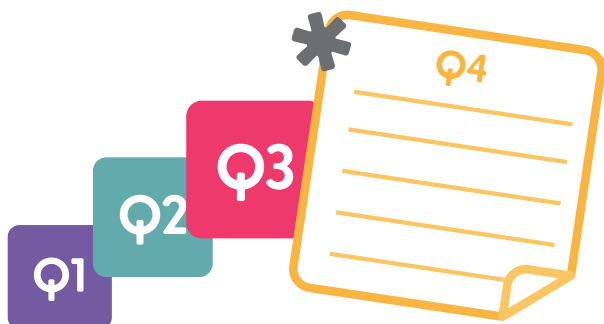
Developing a comprehensive strategy and marketing plan is key to your organization's success. Regardless if it's done at the beginning of the year or mid-year, anytime is a good time to start a marketing plan – just like your workout plan!



## START AT THE END

Shaping your marketing plan becomes easier when you envision what you want to accomplish by the end of the year. New patient acquisition? Launch a referral program? Increased giving for a new program? Whatever you set your sights on, keep your end goals broad – discipline yourself to avoid specifics at this stage. After you've settled on the general outcome, assume you've met that long-range goal and now look backward at the previous four quarters.

- *What milestones do you need to set and reach each quarter?*
- *How will the performance from last year inform but not limit you as you do the work?*
- *What will you measure?*



## REFINE AND WORK SMART

Now that you've mapped out the end goal and quarterly milestones, it's time to move from the "why" of your plan to the "how." For more effective planning, make your goals specific and narrow prior to getting into the tactics. At this point, the SMART goal model helps ground your plan from vision to reality.

- S** **SPECIFIC** What is the goal? Who are you trying to reach (target)? How many, what percentage increase? What do you want to accomplish with this goal?
- M** **MEASURABLE** How will you know that you've accomplished the goal? Define what evidence will prove progress, reevaluate when necessary.
- A** **ATTAINABLE** Make sure you can reasonably accomplish your goal within a certain time frame.
- R** **RELEVANT** Is the goal going to help your business grow? Does it align with your values and long-term objectives?
- T** **TIME-BASED** Set a realistic, ambitious end-date for task prioritization and motivation.

## FOUR STEPS. ONE GOAL.

# THERE ARE NO SHORTCUTS TO ACHIEVING RESULTS. THERE IS, HOWEVER, A PROCESS.

The work you've done to map out the primary direction and marketing initiatives for the year now powerfully positions you at the "how" stage of the process. It's time to roll up your sleeves and dig in. You're doing the research, charting the paths, building your teams and engaging partners – all critical to success.

This is the four-step process we utilize when working with clients to achieve their marketing goals. In this workbook, we map out the process, ask the tough questions and create a plan to help your marketing plan come to life.



### DISCOVERY

- BUYER PERSONAS
- COMPETITIVE ANALYSIS
- CUSTOMER JOURNEYS
- DIGITAL TRENDS
- END-USER FOCUS GROUPS
- INDUSTRY TRENDS
- SEO/KEYWORD ANALYSIS
- SITE ANALYTICS
- SOCIAL MEDIA AUDIT
- STAKEHOLDER INTERVIEWS



### STRATEGY

- KEY AUDIENCES
- ADVERTISING STRATEGY
- CONTENT STRATEGY
- DIGITAL STRATEGY
- PLAN IMPLEMENTATION
- SOCIAL MEDIA STRATEGY



### EXECUTION

- ADVERTISING
- BRANDING
- COPYWRITING
- DIGITAL MARKETING
- EMAIL MARKETING
- PRINT & DIGITAL DESIGN
- PUBLICATIONS
- SOCIAL MEDIA
- TRADE SHOWS & EVENTS
- VIDEO, TELEVISION, RADIO
- WEBSITE DESIGN
- WEBSITE DEVELOPMENT



### OPTIMIZATION

- BENCHMARKING
- QUARTERLY REPORTING
- OPTIMIZE DIGITAL MARKETING EFFORTS
- YEARLY GOAL REVIEW

#### NOTES

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## STEP ONE : DISCOVERY

# CONSUMER BEHAVIOR AND MARKET TRENDS EVOLVE. THOROUGH DISCOVERY PAYS YOU BACK WITH RESULTS.

The Discovery Phase consists of in-depth research and analysis to help you better understand your audience, industry trends, and competition.



### CHECKLIST

- BUYER PERSONAS
- COMPETITIVE ANALYSIS
- CUSTOMER JOURNEYS
- DIGITAL TRENDS
- END-USER FOCUS GROUPS
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**MARKET RESEARCH:** Review the competitive landscape and take notes on your competitors' tactics – traditional, digital, or multichannel (also known as omnichannel) tactics.

**BRAND POSITION:** Document your organization's brand and create a brand strategy document. If you already have one, ensure it's up to date.

**PERSONAS:** Identify your audience. Who are they, what do they like to do, what brands do they follow, and what media do they turn to for information? Now more than ever, knowing your customer's preferences is essential. [\*What's a Persona? And why should you care?\*](#)

**PAST PERFORMANCE:** What did you accomplish last year? List what worked and what didn't work. If you're not sure, ask your colleagues and consider their answers.

If something fell flat or did not get accomplished, ask these questions:

- *Did you use the right technology?*
- *Were there issues sticking to and executing the plan?*
- *What could have made it successful?*

If something worked, and you want to amplify the success, ask these questions:

- *What made this a success?*
- *How could it have been better?*
- *What would you do differently?*

Armed with this information, you will have a good perspective on how to move forward.

### NOTES

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