



CATALYST

A B2B BRAND CONSULTANCY

BrandMatters

[www.catalystb2b.com](http://www.catalystb2b.com)

White Paper

# The CEO Has Asked To See Your Marketing Communications Plan. Now What?



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"Strategy and timing are the Himalayas of marketing. Everything else is the Catskills."

—Al Ries

Top management's increased scrutiny of marketing and marketing communications has really ratcheted up the stakes for CMOs. Managers are facing more short-term pressure than ever in an environment where many B2B products have long-term (and growing) purchase cycles.

In the face of this pressure, what's the key to a successful marketing communications program? Ask any consultant, business adviser or business owner and the answer will invariably include "a good plan". If you want to consistently build your brand, comprehensive planning is essential.

But a plan that is nothing more than objectives and strategy is not a good roadmap; it's simply a business report. The plan must be a practical, working, living document, actively used in the ongoing management of your program.

Below is a plan template to help guide your efforts. It offers a systematic, practical process for building your annual marketing communications plan.

## Situation Analysis

### BACKGROUND / MARKETING SITUATION

- A. History / overview of the problem / situation
- B. General description of the market(s) we are competing in:
  - 1. Technical
  - 2. Industrial
  - 3. Professional
  - 4. Trade
  - 5. Business
  - 6. Consumer
  - 7. Retail
  - 8. Other
- C. Market size / composition
- D. Market trending / future direction
  - 1. Expanding / stable / contracting?
  - 2. Is our product competitive?
  - 3. Does our product / service meet the needs of the marketplace?
- E. Are we competing against another product / service or a method?

Continued...

## **US (PROFILE OF OUR COMPANY'S PRODUCTS / SERVICES) vs. THEM (COMPETITION'S PRODUCTS / SERVICES)**

### **A. Product/service definition**

1. What is it?
2. What is it used for?
3. How does it work?
4. What does it do for the user?
5. Specifications
  - a. Tangible distinctions
    - Color
    - Shape
    - Weight
    - Size
    - Material
    - Design
  - b. Intangible distinctions
6. Options, features, models
7. Price
  - a. High
  - b. Low
  - c. Competitive
8. New or existing product / service?
  - a. How old?
9. Is our product technically better, worse or equal to the competition?
10. Product / service changes planned for the near future? New products?
11. Is there a meaningful point of difference?
  - a. If not, can we create one?

Continued...

## B. Distribution method

### 1. How is the product purchased?

- a. Direct
  - Website?
- b. Indirect
  - Catalog
  - Wholesalers
  - Distributors
  - Jobbers/dealers
  - Brokers/agents
  - Retailers

### 2. Company sales force

- a. Number
- b. Compensation method
- c. Selling method

### 3. Representative / distributor sales force

- a. Number
- b. Compensation method
- c. Selling method

### 4. Do we have adequate distribution? Problems?

## C. Sales

### 1. Comparison

- a. By company / division
- b. By market / region
- c. By product

### 2. Market share

- a. By dollars
- b. By percentage

## D. Position in the marketplace

- 1. Perceived image / position
- 2. Perceived strengths
- 3. Perceived weaknesses
- 4. Who dominates? Who is the market leader?
- 5. Awareness / opinions of?
  - a. Among customers
  - b. Among non-customers

Continued...

## **COMPETITIVE SNAPSHOT**

A. Present information in tabular form for easy comparisons.

Include things like:

1. Sales
2. Market share / awareness
3. Marketing ability (aggressive, etc.)
4. Technical support
5. Distribution method
6. Sales organization
7. Overall strengths
8. Overall weaknesses
9. Key features / benefits
10. Budget estimates for media promotion
11. Future trending (up, down, even)

## **TEARSHEETS, COLLATERAL**

A. Samples of competitors' work

1. Advertising
2. Collateral
3. Sales promotion materials
4. Website

B. Media spending levels

C. Summary of competitive positioning strategy

## **PROBLEM / OPPORTUNITY SUMMARY**

A. What is the special problem or opportunity our marketing communications must address?

1. The primary concern of the end user
2. What is the prospect's motivation?

B. What is the primary response we must provoke through our actions?

Continued...

## Objectives

### MANAGEMENT OBJECTIVES

- A. What is the company's overall corporate vision or mission as stated by the President/CEO?
- B. What are the company's articulated business objectives?
  - 1. Short-term?
  - 2. Long-term?

### MARKETING OBJECTIVES

- A. By product
  - 1. Do we have the right product(s) on the market?
    - a. Develop new product(s)?
    - b. Improve existing product(s)?
    - c. Broaden our line?
  - 2. Are they priced right?
  - 3. Are we in a competitive position?
  - 4. What could be improved?
- B. By market
  - 1. Maintain share?
  - 2. Expand into new markets?
    - a. Find new uses
  - 3. Increase share?
  - 4. Add new accounts?
  - 5. More business from existing accounts?
  - 6. Enlarge existing markets?
  - 7. Attack the competition?

### SALES OBJECTIVES

- A. By company/division
- B. By region/district
- C. By group/individual
- D. By product

### COMMUNICATIONS OBJECTIVES

- A. What is the specific result we want from our marketing communications?
  - 1. Specific
  - 2. Measurable
  - 3. Achievable
  - 4. Realistic
  - 5. To be accomplished in a given time period
  - 6. Expressed in clearly stated, concrete terms

Continued...

## Target Audience

### TARGET AUDIENCE PROFILE

- A. Who are we trying to reach? (Clearly, precisely define target audience) – Try creating an audience persona for each segment / group
1. Industry / market (SIC)
  2. Demographics
    - a. Individual decision / team decision?
    - b. Functions / roles
    - c. Job responsibilities / buying influence?
    - d. Educational levels
  3. Psychographics
    - a. Beliefs, attitude, mindset of the prospect
    - b. Work habits
    - c. Intangibles
  4. Geographics
    - a. Where are they located?
      - Country
      - Region
      - State
      - City, town
  5. Prospect awareness
    - a. Does the prospect know who we are?
    - b. Is our product / service of high or low interest?
    - c. What are the prospect's needs and wants?
    - d. Is there confusion in the mind of the potential user?
    - e. Does the prospect know he or she needs the product?
    - f. Are our claims believable to the prospect?
    - g. Are there any prejudices we have to contend with?  
Is there a credibility gap?
  6. Target audience buying patterns:
    - a. When do they buy?
      - Seasonality?
    - b. Where do they buy?
    - c. How often do they buy?
    - d. Why do they buy?

Continued...

## Strategy

### POSITIONING STRATEGY

- A. How do we want our brands to be perceived by our target audience?
  - 1. Company brand
  - 2. Product / service brands
- B. Do we honestly have what we need (and the target audience demands) to support our desired position?

### CREATIVE STRATEGY

- A. What will we do to help us achieve our objective?
  - 1. Compare
  - 2. Demonstrate
  - 3. Describe
  - 4. Educate
  - 5. Amuse
  - 6. Use case histories / testimonials
  - 7. Create dissatisfaction
  - 8. Dramatize
  - 9. Document
  - 10. Frighten
  - 11. Other

### TONE OF ADVERTISING

- A. What character should our advertising take?
  - 1. Hard sell
  - 2. Product oriented
  - 3. Low-key
  - 4. Other

Continued...

## Tactics

### TACTICAL APPROACH

A. What tools should be employ to implement our strategy and achieve our objectives? For example:

1. Website
  - a. Public website
  - b. Intranet
  - c. Extranet
  - d. Landing pages
2. Advertising
  - a. Print, broadcast or electronic media
    - Business magazine
    - Trade journals
    - Consumer magazine
    - Consumer broadcast media
    - Catalogs
    - Banner ads
3. Specific media utilized
4. Direct mail / direct response (including email)
5. Sales promotion / collateral material
  - a. Brochures, catalogs, flyers
  - b. Interactive media, Internet
  - c. POP
  - d. Premiums
  - e. Other
6. Public relations (including networking)
7. Trade shows
8. White papers
9. Webinars / Seminars
10. Other

### SCHEDULING & RESOURCES REQUIRED

- A. When will tactics be implemented?
- B. What is the development cycle for each tactic?
- C. Who are the required resources to accomplish each task?

Continued...

## FEATURES

- A. Product / service characteristics
  - 1. Technical
  - 2. Specific
- B. What is our ONE most important selling point with each one?
- C. Other copy points to be included.
  - 1. Prioritize.

## BENEFITS

- A. What is the single most important benefit (selling point) to the prospect?
  - 1. Unique selling proposition (USP) or “Promise”?
  - 2. Key fact
- B. What is (are) the problem(s) solved by our products / services?
- C. Why should the prospect be interested in our products / services?
  - 1. What’s our promise to the prospect?
  - 2. What’s the prospect’s reward for reading our communications?
    - a. What should the prospect learn after reading our communications piece?

## CALL TO ACTION

- A. What do we want our communications to do for us? (See Objectives)
- B. What do we want the prospect to do?
  - 1. Call us
  - 2. Visit website
  - 3. Download offer
  - 4. Visit their nearest dealer / distributor
  - 5. Other

## MANDATORIES

- A. Signature
  - 1. Logo(s)
  - 2. Address(es)
  - 3. Telephone, Fax, Internet address
- B. Legal
  - 1. Register, trademark, copyright symbol(s)
  - 2. Legal / policy limitations, restrictions and requirements
- C. Names of people (sales) or groups (dealers, distributors) who should be contacted

Continued...

## Measurement

### MEASUREMENT / MONITORING

A. How are we going to measure the success / failure of our communications efforts?

1. Inquiries.
  - a. Raw vs. qualified?
  - b. Phone calls?
  - d. Website hits or registrations?
  - e. Sales conversions
2. Awareness / opinion levels
3. Market share
4. New account applications
5. Sales

## Budgeting

### BUDGET

A. Method

1. Task
2. Percent of sales
3. Unit
4. Match / exceed competitor spending?
5. Historical / industry standard
6. Arbitrary
7. Predetermined amount(s)
8. Agency / partner to make recommendation

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