

Level set on your vision

Before pulling together your marketing plan make sure the team understands the company vision and how it applies to your marketing strategy.

Write down your company vision and make sure it clearly articulates the company's why. If it doesn't instill passion, go back to the drawing board and create a vision that stands the test of time and will inspire.

1

Define a competitive strategy

Your marketing team needs to understand the greater context in which they will be executing programs.

List all categories of competitors (these may be direct competitors who do the same thing as your company, or they may be indirect alternatives)

Create a competitive marketing grid for the top 3 competitors in each category. This is not a list of capabilities, but rather a map of how your competitors go to market.

Competitor	What is their primary website value message? Think homepage banner copy	What is their content strategy? i.e. Do they focus on videos? Do they have strong evangelists?	Which influencers write about them often?	What is the tone of their messaging? i.e. Is it academic, playful
Competitor A				
Competitor B				
...				
...				

2

Hone in on differentiated positioning

Write down your differentiation.

Every week I talk with business leaders about growing their business. While every business is unique, you'd be shocked how often their differentiation sounds like it comes from the same company.

They are scalable, innovative and action oriented. Blah!

Their product or service may be all of those things, but none of it is differentiating. I promise someone else is also those things.

Your true differentiation must be:

- Unique – What do you do that no one else does? Perhaps what you do is not different, but how you do it is unique? Or maybe it's who you serve that makes you stand out.
- Meaningful – Is your unique gift meaningful to your buyers?
- Credible – Can you prove it?
- Durable – Will you be able to sustain your differentiation over time?

3

Document internal milestone goals

While your marketing will focus on buyer needs, there are internal milestones you will want to celebrate in the market.

Write down when these milestones are expected to occur. Include activities such as:

- New product/service offering launches
- Rebranding effort
- Strategic partnership news
- Funding announcements
- Planned market research

Bonus: Get a free copy of the [Aim-Ready-Sell launch checklist](#) to organize your offer launches

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Get focused on your target buyer

High performing organizations refresh buyer personas every 6-12 months. Make sure yours are up to date.

- Are there new buyer roles you need to cover?
- What's changed for your buyers in the last year?

Don't have buyer personas yet? Look [here](#) for all the resources you need to build personas that are accurate and insightful.

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Establish Marketing goals

Transform marketing from a lead generation engine to a growth engine by focusing metrics on KPIs that drive business impact not just activity.

Be sure to include metrics for:

- Growth
- Adoption
- Advocacy

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Conduct a database audit

- Identify the number of accounts in your total addressable market and narrow your focus to your ideal customer profile. If appropriate agree on a target account list with sales.
- Document the buying committee roles (user, economic, influencer) you will want to engage
- Reconcile total potential reach against your current database – look for physical and email contact information for each member of the buying committee
- Purchase third party data to close gaps
- Evaluate forms, mandatory CRM fields and other communication touchpoints to build an on-going data integrity program

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Map Content to the buyer's journey



Audit your content library to align content to each stage of the buyer's journey (don't forget to consider role-specific assets)

Where gaps exist, prioritize content development in that area – be sure each stage has at least 2-3 solid support resources

Bonus: Download the content strategy template [here](#)

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Align your budget to match goals

MAINTAIN BRANDING	AVERAGE BUDGET	FAST GROWTH
2-6% GR <small>*Gross revenue</small>	7-12% GR <small>*Gross revenue</small>	13-30% PR <small>*Projected revenue</small>
15% HEADCOUNT 80% PROGRAMS 5 % TECH + OTHER	25% HEADCOUNT 65% PROGRAMS 10% TECH + OTHER	30% HEADCOUNT 55% PROGRAMS 15% TECH + OTHER

Source: <https://www.marketing-profs.com/articles/2017/32535/-three-keys-to-best-in-class-marketing-budgets>

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Build your marketing calendar

The complexity of your marketing programs calendar will depend on both people and financial resources available, as well as your unique goals. However, no matter how large or small your budget, you will be best served by conducting integrated campaigns across a number of touchpoints.

- Write down campaign themes
- Conduct SEO research and prioritize Top 20 keywords
- Identify critical industry events
- Document an editorial calendar (be sure to consider social posts, text, video & audio formats)
- Outline your email/direct mail nurturing program
- Plan your digital advertising and retargeting schedule

Remember, it is better to do a few things well, then a lot of things part way.



Have questions? Don't hesitate to reach out. I'm here to help.
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Or call me the old fashioned way at 781-354-1755