2021 MARKETING PLAN TEMPLATE

BACKGROUND

WHAT IS IT?

- A way to connect your organization’s most important goals, with a well-planned approach to achieving that goal (strategy) and the specific ways you’ll execute it
- A collection of valuable insights from all major areas of marketing, woven together to help identify key areas of opportunity or potential challenges for your organization
- A blueprint for who your organization needs to reach, how you need to reach them, and where you should be reaching them, in order to achieve your goals

WHY YOU MUST HAVE ONE?

- More variety of channels (aka opportunities) than ever and that benefit from fitting well together (complements)
- The “customer or buyers journey” is as complex, unpredictable and “needy” as ever so hitting people with the right messaging, at the right time, for the right reasons, can make or break your success
- Helps make sure everyone internally and externally are on the same page
- Proliferation of digital marketing has increased the need and payoff
- Lays a foundation you can revisit to adjust and improve for years after its created
- Can help attract or persuade investors or potential partners

MYTHS

- All Marketing Plans in 2021 must be predominantly digital/digital focused
- A Marketing Plan wouldn’t apply to my organization or would be “overkill”
- Every individual piece of the plan must be there and in full detail
- All sections of a Marketing Plan carry equal weight/importance
- You have to create new materials or define new information to make a Marketing Plan

YOUR PLAN BACKGROUND

BUSINESS INFORMATION

- Headquarters/Locations: List physical addresses, phone numbers, websites and social media profiles for your organization’s location(s) (if multiple designate the “HQ”)
• **Mission Statement:** 1-2 sentences defining some combination of why you exist, what you'll accomplish, who/where you serve, what you do, and why it matters

• **Vision Statement:** Few sentences to short paragraph succinctly describing what you hope your impact to be, how you want the world to experience your organization, and what your true purpose for existing is

• **Leaders & Stakeholders:** List of decision makers and gatekeepers within your organization as well as authors of the Marketing Plan itself

**TIP:** Mission statements can be slightly straightforward or generic, but the best ones are easy to say, easy to remember, somewhat unique to your organization and leave little room for follow up questions

**TIP:** Your mission statement can be the same as your existing/current iteration but should be reevaluated both prior to putting together your marketing plan as well as post-plan to make sure its still the optimal version

**TIP:** Unlike a Mission Statement, a Vision Statement can be more emotional, inspirational, idealistic, and unique and are especially helpful for non-profits and start ups

**SETUP**

• **Historic Efforts:** Do you have any prior plans to include? Any insights from prior efforts? Any existing documents you can “borrow” from?

• **Considerations:** Is there anything the reader should be aware of that may alter the direction or focus of the plan as a whole? Anything else that could be a factor?

• **Timeline:** What time period does this plan cover? What’s your timeline for approval and implementation? What’s your timeline for review? Estimate for next version of Marketing Plan?

• **Milestones:** What are some key dates and items you need to “hit” during the above timeline?

• Responsibilities & Roles: Who worked on the marketing plan? Who will be executed all or pieces of the plan during the timeline? What are the individual roles and tasks assigned to team members?

**GOALS**

• **Define Success:** In 1-2 sentences summarize what success will look like for the timeframe (defined in Setup)

• **Goals:** Sets the stage for the rest of the document as your goals are what everything that follows should be working together towards achieving. It must include Primary & Secondary but Tertiary and beyond are optional. They can be relatively broad but should include a defined timeframe for achieving your result.
**Objectives:** The necessary steps needed to achieve your desired result (goal) with defined measurable outcomes that will determine success (give exact numbers where possible)

**TIP:** Do not define more than 3-4 goals. Keep your goals somewhat broad for increased flexibility but still tied to outcomes that will make the biggest impact for your organization.

**TIP:** Objectives should align with your goals and be a natural, more defined continuation, however, not every objective must align directly with every goal.

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**YOUR MARKET LANDSCAPE**

**INSIGHT GATHERING (RESEARCH)**

- **Market Research:** What information have you already found about your specific industry that may help inform your approach/strategy
- **Industry Trends:** What are some current things happening in your industry that you may need to avoid or attempt to take advantage of
- **Types of Competitors:** List your competitors broken up into logical groupings including options such as Direct Competition, Indirect Competition, Local Competition, Trending/Rising Competition

**TIP:** Not every competitor will be in your industry as people’s “time”, “attention” and “money” are limited, meaning any competition for those resources are a potential threat

**COMPETITIVE ANALYSIS**

Research each major competitor (avg. 3-5) and attempt to record key information consistently across multiple criteria for easy comparison and a good overall view of the landscape

- **Identity:** Their mission statement, tag line(s), approach to imagery, brand colors, logo, etc.
- **Strategy:** Their positioning, key messages, unique selling proposition, audience focus, etc.
- **Communication:** Their Social Media presence, website quality, search ranking, email strategy, partnerships, etc.

**TIP:** Try to have some variety in the competitors you research and select as your focus and be on the look out for new “adds” throughout your business cycle as things move quickly in the “digital age”
YOUR AUDIENCE

AUDIENCES

Your organization’s audience should be at the center of everything you do and drive most of your decision making. Your ability to understand each audience, craft a relevant message and deliver them value will determine your overall success. Since not all audiences are created equal and not all audience information will be equally valuable, detailing the audience approach in your plan is essential.

- **Target Audience:** The most important audience(s) in terms of achieving your goal and that will serve as the focal point for majority of your communication activity.
- **Audience Segmentation:** To better understand your target audience and how to best engage them, you’ll need to break them down into more specific categories (segments). These categories are designed to give you a clear picture of who they are, how they act and what they like.

**TIP:** Its okay to have a Primary, Secondary and even Tertiary target audiences but any more than that it can diminish the impact of them being considered a true “target”. They should also be ranked or put into a hierarchy if possible.

**TIP:** The more segmentation you utilize the more opportunities you’ll have to be personal, relevant and effective with your communication. However, over segmenting can lead to much lower volume (reduced impact) or fragmenting resources.

**Common segmentation categories**
- **Demographic:** Age, gender, HHI, marital status
- **Geographic:** Country, state, town, zip, language
- **Employment:** Career, field of study, company, role, seniority
- **Behavior:** Device usage, purchase habits, activity level, type of engagement
- **Psychographics:** Values, attitude, beliefs, motivation, personality
- **Interests:** Affinities, content consumption, hobbies, memberships
- **Media Consumption:** TV watchers, social media mavens, forum frequenters
- **Data Based:** 1st party data (information you gather directly from the audience) and 3rd party data (information you obtain via partnership or purchase and indirectly provided by the audience)

**TIP:** While demographic segmentation is by far the most common and straight forward, organizations that can classify their audience based on deeper more personal factors typically create stronger bonds. Reaching someone because of what they believe tends to trump reaching then because of what they are.
PERSONAS

A deeper more detailed approach to classifying your target audience. While Personas do incorporate segmentation, they also include a variety of other key characteristics and considerations. When done correctly they read more like a story and can serve as “profiles” to quickly immerse you into their “world”.

Common persona criteria/fields:

- **Category/Name**: Label your audience by group or with a catchy phrase (i.e. Paulina the Persona)
- **Key Demographics**: Age, gender, education, employment, family status, etc.
- **Goals**: What is it that your persona hopes to accomplish or receive
- **Media Consumption**: What types of mediums do they use and where are they most likely to engage with brands (can also include specific media like tv show or magazine title)
- **Quote**: A 1st person POV statement that summarizes the persona
- **Motivations/Influencers**: What drives the audience and who impacts their decision making
- **Obstacles/Objections**: What are the biggest challenges they face or need to overcome
- **Affinities**: What are the types of things your audience does, follows or seeks information on
- **Misc.**: Categories based on your organizations specific goals, industry or audience segments

**TIP**: Don’t overdue it with Personas. They can be very helpful tools but require work to do correctly and should be updated routinely. The fewer to focus on the easier they’ll be to manage and bigger impact each will make.

CUSTOMER/USER JOURNEY

**Journey Stages**

What are the key touch points your audience moves through on their journey towards your desired outcome (i.e. donation)? These points represent both what your organization needs to achieve and what your audience’s current mindset will be.

**Examples:**

- **Organization** → Introduce; **Audience** → Discovery
- **Organization** → Engage/Educate; **Audience** → Consideration
- **Organization** → Inspire; **Audience** → Evaluation
• **Organization** → Transact; **Audience** → Decision

**TIP:** Every organization is unique. There’s no one correct amount, type or names of stages. However, your stages should always map directly to your specific goals and audience(s).

**Journey Criteria (per each stage)**

Although there are many types of criteria you could use to define your stages and touch points, your “Journey” ultimately needs to represent who you’re reaching, what actions you need them to take, and how you’ll get them to do it.

**Example Criteria:**

- **Desired Outcome:** What’s the specific goal you hope each stage results in and that will help move the audience further down their path.
- **Audience:** Based on your target audience and personas, what are the key considerations for each major audience type during each stage.
- **Messaging/Content:** What are the most effective messages, value offers, calls-to-action and potential content to deliver to your specific audience at each of their specific stages.

**TIP:** Although “Marketing Tactics” don’t have to be included as a criteria in the “journey” it can either be retroactively layered on (once you finish that section of the plan) or used as a way to “check your work” by ensuring your tactics can all fit into your journey in at least some place to make a positive impact.

**BRAND IDENTITY**

The elements of your brand that help define who you are, distinguish you from other organizations and help to form a deeper connection with your target audience.

**Components:**

- **Basics:** Name, Logo, Mission/Purpose, Vision and Core Values
- **Visuals:** Colors, Fonts/Typography, Icons and Imagery/Photography
- **Communication:** Attributes, Tone, Voice (personality), Key Words/Phrases and Calls-To-Action
- **Misc./Optional:** Mascot, History, Tagline, Wordmark, Symbols, Glossary, Link Structure

**Key applications/uses:**

- Marketing collateral (signage, letterhead, business cards, etc.)
- Website
- Email
• Social Media (profiles and posts)
• Press release
• Presentations (internal and external)
• Advertisements

TIP: Its okay and encouraged to routinely revisit specific elements to be “refreshed”, however, keep in mind that consistency is one of the most important attributes of any identity

TIP: As the world continues to move to “digital first” its important to test your specific elements in both an online and offline setting

TIP: Don’t try to be all things to all people. Authenticity is one of the highest rated qualities in a brand and keeping a more specific audience in mind will help ensure relevance and recognition

TIP: Each category of components and the specific elements within, should be connected and work together, both as individual pieces and as parts of the whole

VALUE PROPOSITION

Value Propositions are a way to communicate to your audience the main reason why they should care about your organization. They’re typically summarized as a declarative statement, phrase, headline or even image and can be tied to a specific service, innovation, product or feature.

Key criteria:
• Should answer the question “Why should I buy from or engage with you, instead of someone else?”
  o Should be THE #1 most compelling reason or offer your audience will care about
• Should be concise, easily understood and avoid buzzwords/jargon
• Should solve a key problem for your audience and present your organization as “the solution”
• Should help differentiate you against other competing/similar products and services
• Should be used directly in your external messaging, website, marketing or advertising efforts
• Should be able to back up any claims or promises you make

Sample basic templates:
• We help (x) do (y) by doing (z)
• For (target customer) who (statement of the need or opportunity) our (product/service) is (product category) that (statement of benefit)
• Answer With 3 Keywords or Phrases: Why, How and Why

Examples:
• Uber: The Smartest Way To Get Around
• iPhone: The Experience IS the Product
• Slack: Be More Productive at Work with Less Effort
• Shopify: The ecommerce platform made for you
• Zoom: #1 Video Conferencing and Web Conferencing Service
• WordPress: Welcome to the world’s most popular website builder
• Airbnb: We exist to create a world where anyone can belong anywhere, providing healthy travel that is local, authentic, diverse, inclusive and sustainable”
• Spotify: Music for everyone.

TIP: Always create and review your Value Props from your audience’s perspective. Something you may deem as providing value may have little worth to your audience and vice versa. Be true to who you are and what you do, just make sure that still aligns with what your audiences truly values.

SWOT ANALYSIS (BRAND STRATEGY)

A S.W.O.T. should summarize the most important insights about your brand, audience, and market landscape (from this marketing plan), in a quick and easy to read format. Based on the info listed, your organization should get a clear picture of what direction to head in or avoid. And whether it makes more sense to protect against weaknesses or lean into your strengths.
• Strengths: Where do you typically see the best success or are currently doing better then your competition
• Weaknesses: Where are you lagging behind on or currently have concerns/are struggling
• Opportunities: What are some things you can take advantage of or could be key areas for growth/expansion
• Threats: What are some things that could hinder your progress or are areas you need to avoid/mitigate risk

TIP: SWOTs are typically done as a 4 square grid with Strengths and Opps on the left and Weaknesses and Threats on the right. However, any format will work as long as the info is covered.

TIP: Keep the SWOT pretty high level and just to the most important and impactful items that you’ve already outlined or exposed in your marketing plan document
TIP: It’s okay to be repetitive from section to section (i.e. a weakness can be the opposite of your strength, or threat opposite of your opportunities)

YOUR MARKETING COMMUNICATION

MARKETING FRAMEWORK

Marketing Goals

The specific objectives you hope to achieve with your marketing activity. They often overlap with your business goals, but can also be unique. While the goals themselves can be relatively simple, they’ll serve as the foundation that all of your subsequent marketing activity will be built around. Make sure you choose goals that are realistic but that will also make enough of an impact.

Key criteria:
- If achieved, will it be impactful enough to consider your plan a true success?
- Is it measurable (both timing and volume)?
- Is it realistic? If not, will coming close still be considered success?
- Will it be adopted by all internal participants involved with the plan? By stakeholders?
- Is it repeatable in future plans (not a requirement but still helpful)?
- Will it lend itself to a specific approach (aka strategy) for achieving it?
- If more than one, can they be clearly put in order of importance (primary, secondary, tertiary)? Do they complement each other or at least not compete?
- Can they be clearly and easily communicated/understood?
- Are they relevant to your value prop, SWOT, audience and other key info from your plan?
- Example Checklist/Template:

Common marketing goals:
- **Increase brand awareness:**
  - Introduce yourself to new audience members or communicate a new business change to an existing audience (i.e. new product or service)
- **Generate high quality leads:**
  - Capture key information from your target audience via various touch points such as a content download, demo request, contact form, click-to-call, etc.
- **Increase revenue:**
  - Maximize your profitability aka the return on your investment (ROI) or return on your ad spend (ROAS)
- **Higher share of market:**
• Establish presence in a new market or gain visibility within an existing one

**Thought leadership:**
- Increase share of voice on a specific topic or field to establish trust and credibility within a specific audience

**Increase loyalty:**
- Generate more activity from an existing audience (i.e. repeat purchases or donations) or maintain that activity for a specific period of time.

**Attendance:**
- Maximize participation for a specific event either offline or online

**Channel specific:**
- Increase followers (social media); Increase keyword presence (search); Newsletter sign ups (email); Site traffic (website)

**TIP:** Try to avoid using too many goals, especially that can’t be achieved simultaneously. If choosing 3 goals, try to select ones that represent different stages of the “funnel”. In theory, this helps to ensure that one goal will be directly impacted by the success of another other.

**TIP:** Try using a set time frame that’s long enough to give yourself time to gain momentum and adjust, but that’s not so far out it becomes challenging to track your progress and adjust along the way.

**Marketing Strategy:**

This should be your high-level approach to achieving your marketing goals. If marketing goals represent the key problem you need to solve, think of your strategy as the blueprint for that solution. While your goals determine the direction of your strategy, your strategy determines the direction for your channels and tactics.

**3 Major Components**

Your strategy should contain an overarching theme (statement) but can be broken down into several individual components. These components can be woven together to form “sub strategies” that help pay off and expand on your main strategy or just listed separately as additional context/support. If the trunk of the tree is your main strategy, these components should form the branches.

**Audience:**
- Who is the audience we need to focus on reaching to achieve our goal and what segmentation can we use to ensure relevance for what and where we communicate

**Messaging/Content:**
What are the specific ways we can communicate that will help in achieving our goals, will best resonate with our target audience and will maximize the effectiveness of the channels, tactics and placements we're using?

- **Channels, tactics and placements:**
  - What are the general mediums of communication we’ll be focused on using to achieve our goals, what specific activity will we look to execute within those areas and where will those executions be placed?

**Common marketing strategy examples:**

- **Maximize reach:**
  - Focus on channels and tactics designed to generate a high volume and/or high quality of impressions (people seeing your brand/message).
  - Typically focuses on a mix of online and offline activity and involves placements that are highly visible or repeatable. Organic reach may be limited and so channels and tactics where you pay by impression are usually the focus.

- **Maximize efficiency:**
  - Focus on channels and tactics that have a high return vs their cost or don’t require large investments to execute and succeed with.
  - Typically focuses on organic (free) channels and tactics or channels that allow you to pay by the click, engagement or purchase rather than impression.

- **Nurture:**
  - Use channels and tactics designed to strengthen your relationship with an existing audience until they’re ready to commit or resistant to alternative opportunities.
  - Typically focuses on delivering value to your audience in a variety of ways via offers/promotions, content, education or engagement.

- **Reinforce/Repeat:**
  - Use channels and tactics that ensure you’ll reach the same person numerous times until they eventually take their first action, or additional actions.
  - Typically focuses on the most visited channels by your audience and heavily involves maintaining a persistent presence (i.e. billboard or remarketing).

- **1:1 (one to one or one to few):**
  - Use channels and tactics that allow you to “personalize” your messaging and activity to best fit a very specific audience or even person.
  - Typically focuses on digital efforts and is based on your audience segmentation and personas. 1: Few is a variation of this that allows you to group your efforts in slightly bigger groups while still remaining highly relevant to a specific audience.

- **Digital First/Focused or Mobile First/Focused:**
  - Use digital/mobile channels and tactics exclusively (or use minimal amount of offline and only in a complementary way).
Typically focuses on a mix of your organic online presence and your paid digital efforts. Things like cross-device (reaching someone on their phone and computer), mobile website experience, social following, email list size and google search presence are key factors in a digital focused plan.

- **Test & Learn:**
  - Use channels and tactics that allow you to get “smarter” as your activity progresses, generating valuable insights that can be immediately incorporated back into your efforts.
  - Typically focuses on digital channels and tactics and requires outlining specific segments/areas to measure and the specific metrics that will be used for evaluation.

**Sample complete setup:**
- **Overall Strategy:** “Achieve [our goal] by [Theme 1], [Theme 2] and [Theme 3]
  - Theme 1: The most important pillar of our strategy
    - Tease specific channels, tactics and placements
    - Tease audience considerations
    - Tease messaging considerations
  - Theme 2: Additional pillar of our strategy
    - Tease specific channels, tactics and placements
    - Tease audience considerations
    - Tease messaging considerations
  - Theme 3: Final pillar of our strategy
    - Tease specific channels, tactics and placements
    - Tease audience considerations
    - Tease messaging considerations

**TIP:** Although you should never enter into a plan without a concrete strategy, no strategy is perfect and therefore you should be prepared to pivot along the way as needed, based on results.

**MARKETING MIX (CHANNELS)**

There’s no one perfect channel to communicate with your audience. All organizations, their audiences and their messaging is unique, and therefore requires a unique approach. The specific variety of channels you do employ, and how they can work together, is considered your “mix”. Selecting your mix should be based on a combination of your organization’s marketing goals, SWOT, and audience insights.

**Channel categories:**
- **Owned Media:**
Channels your organization is in 100% control of and are exclusive to your brand. These channels form the foundation of your communication efforts.

1. **Earned Media:**
   - Channels that generate activity on your behalf by extending your communications or brand mentions to a broader or new audience
     - Examples: Press Releases, news story (featuring you), awards, reviews

2. **Paid Media:**
   - Channels you can pay to artificially boost your presence or reach a specific audience (even if they don’t know you yet)
     - Examples: Paid Search, Paid Social Media, TV Commercials, Print Ads

3. **Shared Media:**
   - “Shared” is the newest category and are channels where your audience spreads your message or content to each other on your behalf
     - Examples: Social sharing, forums, brand “swag”

**Top 5 most common channels (not in order):**

1. **Website:**

   The most important channel by far for the success of any organization with an online presence. Your website is always on, and is the most common touch point between you and your audience. Whether working with limited resources or a major campaign budget, your websites’ function, aesthetic, and overall user experience, should be a top priority.

   **Mantra:** You wouldn’t invite over important guests or throw a party if your house was a mess. Don’t worry about the party favors, or conversation starters until your house is in proper order.

   **TIP:** A Blog can be a great way to add personality or value to your website without distracting from its primary role or purpose. They don’t have to be long or professionally written to have an impact and their only real cost is time and potentially some frustration.

2. **Social Media (Organic):**

   Although the mix of specific platforms will vary, Social Media serves as the “2nd home” for any organization (website being the first). Accounts are free to setup but challenging to grow. However, no matter how small your following, Social Media provides a can’t miss opportunity to extend your brand, distribute content and directly speak to your audience in an environment designed for engagement.

   **Mantra:** Quality over quantity. Better to take your time and build strong relationships that can exponentially grow over time than swing for the fences and miss a lot.
**TIP:** Select the specific Social platforms you use based on the audience your reaching, the goals you need to hit and your organizations comfort level/existing presence on one platform vs another. For example, If you don’t know how to use Twitter or have had no presence there to date, you may want to focus somewhere else to start, even if your audience is on there.

3. **Search (Organic):**

Organic Search is the most important channel for supporting your website. Majority of audience “journeys” begin and end with a simple search. While your organization should always be at the top of the page when you’re searched for by name specifically, to truly expand your reach you’ll need to place high for all of the terms relevant to your business. Your rank and effectiveness in Search is typically dictated by your SEO (search engine optimization) which is a mix of art and science, working within platforms like Google and Bing, to increase the position and frequency your organization appears in Search results. Typical factors include content/keywords used on your site, page speed/load times, technical setup, link presence and authority. Local and mobile SEO are also key factors in ranking.

**Mantra:** Pick a handful of the most important terms to your organization and find a way to “own” them by ensuring the content on your website both literally and contextually speaks to them.

**TIP:** If your organization struggles in SEO or has a short-term crucial need, Paid Search (Search Engine Marketing) can be a great complement to your organic efforts or even artificially replace. “Paying to play” can be a great stop gap while you build up your organic efforts or pivot your strategy towards a new set of terms.

4. **Email:**

Email is one of the most direct ways you’ll have to reach a captive audience and that allows for “2 way communication”. While email was on the decline for years, its since rebounded as a very legitimate and “tolerated” way for audiences to stay connected to organizations they've interacted with (or at least have an interest in). The only true limitation is the size of the list you can leverage, as most email sending providers are free or relatively inexpensive to use. Having a large “list size” also allows you to better segment your list, and send only the most relevant emails to specific audiences. While sticking to a somewhat regular cadence, be cautious not to overindulge as your audience will be quick to unsubscribe or tune out future sends.

**Mantra:** I will not violate the unwritten rule….”my audience tolerates me invading their inbox as long as I don’t abuse the privilege and offer them some value (i.e. literal value or things like entertainment)”. Much like Social Media, quality over quantity is a good thing to keep in mind.
TIP: If email is highly effective for your organization or has the potential to be, a secondary or sub goal of your marketing plan could be to generate more memberships for your email list. This is typically done through sign ups or forms asking visitors to voluntarily provide their emails (typically to get something in return).

5. **Pay-per-click (PPC):**

Any channel where you can pay to promote your organization through a paid auction system. All auctions are bid based, either paying for Impressions, Clicks or “Conversions”. Most pay per click channels have an organic branch that can serve as a complement or vice versa. Google Search Ads and Paid Social Media are two of the most common, however, things like Influencers or sponsored content/native ads are quickly gaining ground. While some PPC channels do have barriers of entry such as the skill they require to run or cost commitments, there’s usually at least some level of activity that should fit within your organization's resources and goals.

**Mantra:** I don’t need huge dollars to be able to include a Paid component to my plan that should help boost my non-paid efforts. I can’t only rely on paid media but it can help complement my other work.

**TIP:** If lack of skill/personnel is your biggest barrier to using a Paid component in your plan, explore some of the freelance sites gaining popularity. You can find experts in specific fields or with specific skills, on platforms like Fiverr, that can be short term affordable stop gaps that allow you to get started.

**Top 5 Social Platforms (not in order):**

If just starting out on Social Media don’t try to do too much too quickly across too many platforms. Social Media building is a marathon not a sprint and it’s better to be successful in a smaller scale and grow from there than try to do all things at once, and not achieve any.

1. **Facebook:**

Most universally used Social Media platform that skews older but still has the broadest population of users, allowing every brand to have at least some opportunity to connect with their audience. Also suitable for almost every type of content or messaging strategy.

**Best Use:** Any audience, any goal, any tactic, any content. It may not be the best at any one thing but it’s the most universally used and applicable social channel we have.

2. **Instagram:**

Skewing a little younger than Facebook, IG is the most visual of the Social Media platforms. Its especially strong for lifestyle brands and non-profits who can capture interest or illicit
an emotional response through their imagery. Although it began as more of an “awareness” type channel, IG has become one of the most “transactional” of the Social platforms.

**Best Use:** Showcase your organization’s personality or “lifestyle”. Works best when combined with highly engaging imagery or video and is not meant for longer-form, long winded, content.

3. **Twitter:**

Spans multiple populations and a variety of use cases. Unlike Facebook and Instagram, quick “snackable” content works best. Messaging that entertains or teases a larger story tend to do best. This platform is equally suited for pop culture “trendjacking” as it is for getting breaking news.

**Best Use:** Keeping your audience up to date, spreading important but “quick hit” information or teasing longer form content being provided somewhere else or by someone else. Very news friendly.

4. **YouTube:**

The premier video platform and the second most searched website in the world. As video continues to dominate in terms of preferred medium, YouTube’s importance as a go to source for content continues to rise. Whether to showcase a more intimate look at your organization, put your personality on Display, or provide your audience with valuable information, YouTube’s videos can work in a variety of formats to achieve multiple different objectives.

**Best Use:** Any organization that has or could have a good supply of video content. Entertaining and educational content both do well. Polished “commercials” style videos and casual iphone video clips can also both do well.

5. **LinkedIn:**

The most widely used and respected network for “Professionals”. Although the content is starting to broaden, LinkedIn is still considered a breeding ground for thought leadership. If your organization has any segmentation or audience considerations involving careers or field of study, LinkedIn is a must use. Its also a powerful vehicle for establishing credibility around a specific topic or industry. Even with numerous alternative job listing sites, LinkedIn is also still the premier destination for employee recruitment.

**Best Use:** Any time your audience or goals involve “careers” of any kind, LinkedIn is a no brainer. Also great for employee recruitment.

**MARKETING TACTICS**

Your Marketing Mix is the group of channels best suited for achieving your goals. What specific actions you take within those channels are considered your tactics. Your tactics
serve as the “front lines” of your marketing plan. They should always be helping to bring your strategy to life and to pay off any insights you’ve gathered. The tactics you choose can be repeated across all aspects of your plan or deployed just in very unique, specific situations.

**10 Common marketing tactics (not in order):**

1. **Events:**

Events can be applied to both in-person and online gatherings hosted or contributed to by your organization. They should be promoted leading up to the event, during the event and even after, to maximize the value they provide. Events can be one-off and larger, or more intimate and reoccurring. Whether online or offline, their promotion can include both types. Typically the best place to start for any event is with your most loyal followers and frequent visitors. Events can also be a great way to gather additional information about your audience, one of the most valuable being their email addresses.

**Examples:** Educational (online = Webinar; offline = “open house”); Entertainment; Networking; Celebration/Giving back; New opening/hire/launch

2. **Content:**

Whether curated or created, content is one of the most powerful weapons in a marketer’s arsenal. Content can serve a variety of purposes but typically falls into the category of Educating, Entertaining, or Inspiring. Content can be equally effective as long and in-depth resources or quick and easy to digest “snacks”. Your content should be planned out (content calendar) and include a strategy and process for amplifying its reach. Content should both reflect who your organization is as well as what your audience is looking for. No matter what your plan’s goals, there is always a way for Content to help get you there.

**Examples:** Long form; Short form; Serial; Interviews/testimonials; Infographic; Transcript; Blog post; Case study

3. **Remarketing:**

Remarketing has become one of the best ways to break through that noise. Remarketing allows you to reach the same person, over and over, until they’re finally ready and willing to take action. Who you target can be based off of 1st party data (your data) like people who visit your website or a specific list of emails you’ve obtained. Remarketing’s best feature is its ability to help you better “personalize” your messaging. Its also at its best in Paid formats, where you can better ensure exactly who you’re reaching, how much, and when.
Examples: Website visitors; Target email list; Shopping Cart Abandonment; Upsell; Repeat donations; Sequential messaging

4. **Surveys/Focus Groups:**

When in doubt the best way to understand your audience is by asking them directly. While focus groups can be more expensive and time consuming, online surveys are a fast easy alternative for gathering valuable insights. Surveys can be equally effective when distributed to a broad large base or to a smaller more focused segment, depending on your needs. Not every question needs to uncover a hidden secret but each should provide some sort of visibility into how your audience thinks, feels and behaves. This is also your chance to ask very specific preference or perception questions in regard to your organization. Just always keep in mind, the shorter and easier your survey is to take, the higher the likelihood your audience finishes it and answers honestly.

Examples: Question types- Open ended/text; Multiple choice; Select all that apply; Sliding scale; Agree/disagree; Rank in order

5. **Contests/Promotions:**

Although typically used to artificially inflate engagement, when done correctly, contests or promotions can be another great tactic for breaking through the noise and getting someone’s attention. Recurring or long term promotions also serve also as “serial” content, creating a need for your audience to keep coming back. Because they can sometimes attract a less committed or ideal audience, try to keep the promotion “on brand” and within the context of your goals. The more authentic and contextual relevant the effort, the more likely it will be to resonate with your true audience. Also be sure to make all of the information and details very clear upfront (transparency is essential).

Examples: User generated/submitted content; “best of” vote; % off or discount; Refer a friend; “Enter to win”; Serial (repeating)

6. **Reviews/Awards/Testimonials:**

One of the best tactics for gaining credibility and trust. These can be especially important for situations where the audience may be taking a risk in choosing your brand or requires a heavier commitment. Almost every organization has “alternative” options and removing any doubt that you’re the most logical fit, can be the deciding factor. There’s also an increased weight put behind peer to peer communication and Social Proof (seeing others doing what you're potentially going to do and showing their success). This allows you to “sell” the person on your organization without having to come across as “salesy” yourselves.

Examples: Video testimonials; quotes; award badges/logos or page/section of your website; Personal (audience) anecdotes; Product reviews; Net Promoter Score
7. **Sponsorships/Partnerships:**

Partnerships are a great way to gain access to a channel or audience that may be challenging to reach on your own. They’re also like testimonials/reviews, in that they provide additional credibility through association with the partner. They can also help to overcome resource limitations by co-opting another organization or company’s skills, knowledge, and experience. Although a good portion are “pay to play”, partnerships can also be mutually beneficial (free) or provided out of good will.

**Examples:** Co-marketing; Paid sponsorships; Event marketing; PR/media publications; Government (national or local)

8. **Marketing Automation:**

Marketing communication can be exhausting, especially in a world where personalization and speed are paramount to success. To provide the same level of activity without requiring much more in resources, automation platforms allow you to automatically execute tasks based on key triggers or events. The most common applications of these platforms are for Email, but also apply to things like Lead Management, Social posting, and PPC campaigns. As long as you plan ahead and work your plan, these systems can be powerful ways to keep your marketing engine running without always being hands on.

**Examples:** Email nurture/drip campaigns; Automatic one-off emails (i.e. birthday or anniversary); Lead scoring and tracking; Social media posting; Dynamic Website content

9. **Mobile:**

It’s a digital first world, and within that world, life is dominated by Mobile. Websites are now being built specifically for Mobile, and then made sure to work on desktop vs the other way around. Email is starting to be checked more on mobile devices than desktop. Specific Social Platforms are 100% mobile or skew very heavily in that direction. More searches are done from phones, than any other type of device. Your audience is constantly on their phone, and the more you take advantage of that, and provide a positive mobile experience, the further your overall marketing efforts will go.

**Examples:** Instagram; Mobile apps or app placements; SMS/Text message marketing; Push notifications; Mobile remarketing

10. **Video:**

It’s a digital world, with people glued to their phones, and one of the most common things they’re doing is watching a video. Video has become by far the most preferred medium for audience engagement. Videos can run in a variety of lengths, formats and quality levels and all still help to achieve your goals. Not all video is created equal though or best suited for every situation. Therefore, video requires its own mini strategy to do it correctly, and
should very much be inline with any other mobile, social and overall digital approach to your plan. One of the fastest growing trends are platforms that quickly and easily allow you to put together custom videos for a low fee or in some cases totally free.

**Examples:** Embedded on website; YouTube; Native or sponsored; OTT or streaming TV (i.e. Hulu); on-site TV monitor/screen

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**EVALUATING YOUR SUCCESS**

**MEASUREMENT FRAMEWORK**

By far the most important component to your marketing plan is your goals. Everything you do should be in complete service to achieving those goals. Therefore, it is paramount to your plan’s success, to have a well-defined thought-out plan for measuring your progress towards those goals. This approach to measurement and the specific details of what and how you’ll measure, form your framework.

**Major components:**

- **Specific Objectives:**
  
  Every goal should be measurable both in the timing and volume needed for success. Those measurements may not be clearly or specifically defined in your goal or strategy. Listing the details in your Measurement Plan will help give you a clear path to evaluating success, both overall and at very specific levels. Having other measurable milestones leading up to your goal can also provide more flexibility or evaluating success as you go rather than waiting until its too late to adjust anyway.

  **Example:** Drive 300K more revenue in 2021, hit 100K by end of Q1 2021 and hit 40K in January 2021

- **KPIs:**
  
  The Key Performance Indicators for your plan’s success. Only measurable Goals should be in your plan, and each should have one to three main metrics (numbers) used for evaluation. While other performance indicators (secondary metrics) can still be tracked and utilized, these KPIs are the few that should ultimately decide success. If your objective laid out specific marks you’ll need to hit, the metrics for those marks should essentially be your KPIs.

  **Example:** If your objective is to generate 400% more revenue, then your KPIs may all be purchase based numbers such as total purchases, cost/purchase, purchase rate or even avg. purchase value.
• **Secondary Metrics:**

While all metrics are not created equal, most are worth tracking and monitoring. Often a KPI will be influenced by several other smaller numbers that contribute in different ways. If you find yourself way behind your goals, being able to dig into as many causes for that shortcoming will give you the best chance of quickly solving it.

**Example:** If your KPI is Total Purchases and you’re falling short, you may want to look into the number of visitors you’re getting to your website or the amount of time they’re spending once they get there. If your KPI is purchase rate, you may want to look into how many people drop off in your checkout process or abandon their shopping cart.

• **Benchmarks:**

While measuring the progress towards your specific objective can be extremely helpful, so can comparing your performance to other key items along the way. In order to make those comparisons, you’ll need to first establish the KPIs and Secondary metrics you want to focus on, and then document either their historic performance, projected or a combination of both, as your “benchmarks”.

**Common types of benchmarks:**

- **Time:** Compare Year over year, month over month or week over week.
- **Industry:** Compare your performance vs the avg. in your industry/market
- **Projections/milestones:** Compare your performance now, to where you should be, in order to reach your goal in the future
- **Instinct:** Compare your performance to what you’ve typically seen or experienced and the expectations you have for this specific plan
- **Competitor:** Compare your performance to that of specific competitors within your space (this one is rare as access to that info can be difficult)

**TRACKING FRAMEWORK**

The data you extract via your measurement plan is only as good as the data it has access to in the first place. If the data you’re basing decisions on is inaccurate or incomplete, then none of your measurement will be matter. The only way to ensure you’ll have accurate data is with accurate tracking. Your tracking approach and the specifics of what and how you’ll track things, is your framework.

**Major components:**

• **Audit:**

Prior to launching any plan, you’ll need to directly test all tracking tied to the KPIs and other metrics you’ll be measuring. Use a checklist of each metric and the specific activity generating that result. Go through your list, mark which are working and which are not,
and then make note of any inconsistencies or limitations that may need to be solved or accounted for.

• **Testing:**

Although any plan you launch should be setup well for success, things in marketing don’t typically go as planned. In order to make ongoing improvements (optimizations) and gather insights that can be integrated back into your plan, you’ll want to conduct some form of testing. Not all tests need to be highly structured, but if you do want to run structured tests, make sure to only test 1 variable at a time. For unstructured tests, it’s still good to go in with a hypothesis and then conclude the “test” once a definitive answer to that hypothesis has been provided by the data.

**Examples:** Structured Test = A/B Testing (is Headline A more effective than Headline B); Unstructured Test = Do we get more female visitors from this post or more male visitors

• **Tracking template:**

All of the metrics you use to analyze your campaigns will need to be measured, and to be able to measure, specific tracking may need to be implemented. It’s important to ensure that your list of KPIs and Secondary Metrics can all be measured consistently, accurately, and quickly and so having the proper tracking in place is essential.

**Playbook Document:** Should contain the goal you’re measuring against, the action the audience will need to take, the specific place this action will occur, the metric that will signal the action was successfully taken, and the specific way the tracking for that action is/will be implemented.

• **Definitions:**

If there is any language being used in either your tracking setup or measurement infrastructure that’s not widely known, unique to your organization or could leave room for confusion, then define it in a “glossary” like format that anyone involved can access.

**Example:** If you simply list “conversions” or “cost/conversion” as your KPI, you’ll need to define the specific actions you’re considering a “conversion” event.

• **Implementation:**

Any new tracking not yet setup, or existing tracking that needs adjustments, will need to be taken care of prior to executing your plan. Build in a period of time prior to launch that can be used for implementation and QA (quality assurance). Err on the side of caution as these things are hard to predict the exact timing of and changes to other parts of your plan may be needed based on what’s able to be setup or not.

**Recommended timing:** Two to four weeks from audit to implementation
• **UTM template:**

UTMs are pieces of information that can be added to the end of a link/url in order to track more specific information about the audience's interaction with that piece of communication or advertisement. Although user's hardly notice them and they have no real impact on the interaction itself, the important is “unpacked” by data aggregators (like Google Analytics) and can be analyzed at a much deeper level.

**UTM Fields:** Campaign, Source, Medium, Content, Keyword/Term

**Playbook Document:** Should contain the date of creation (for that UTM), the person or organization who created it, the link/url it will be added to, and each of the 4 main fields. A UTM should be created for each link that will be used in a unique way or that will need unique information tracked for it.