



THE ULTIMATE GUIDE TO THE B2B **MARKETING PLAN**



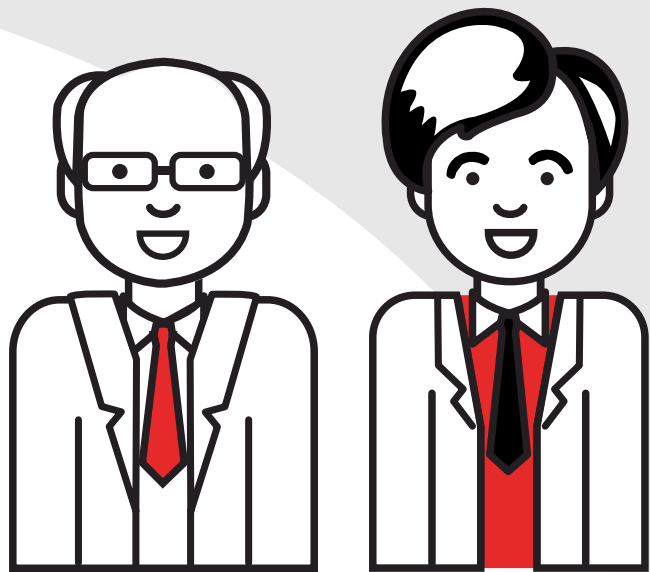
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THE ULTIMATE GUIDE TO THE B2B MARKETING PLAN

 **THE MARKETING
PLAN IS ONE OF THE
MOST IMPORTANT
OUTPUTS OF THE
MARKETING
PROCESS.** 

KOTLER & KELLER, 2008



 **IT FORCES THE COMPANY TO
SHARPEN ITS OBJECTIVES AND POLICIES,
LEADS TO BETTER COORDINATION OF
COMPANY EFFORTS, AND PROVIDES
CLEARER PERFORMANCE
STANDARDS FOR CONTROL.** 

KOTLER, ARMSTRONG, WONG AND SAUNDERS, 2008

INTRODUCTION: **WHY DO I NEED A MARKETING PLAN?**

Failure to plan, as Benjamin Franklin once said, is planning to fail. While many people would rather be doing than planning, **marketing is at its strongest when it's structured.**

WHY?

Think of it as your blueprint, the master document that aligns your marketing strategy with your business goals whilst orchestrating your marketing objectives into a coordinated set of coherent activities.

It does this by helping you understand:

- **Where you are**
- **Where you want to be**
- **How to get there** (in the most efficient and profitable way!)

Whilst it may take time initially to systematically plot all the phases of your plan into one organized effort, in the long run you will continuously reap the benefits, as you navigate your competitive landscape with greater ease and clarity.

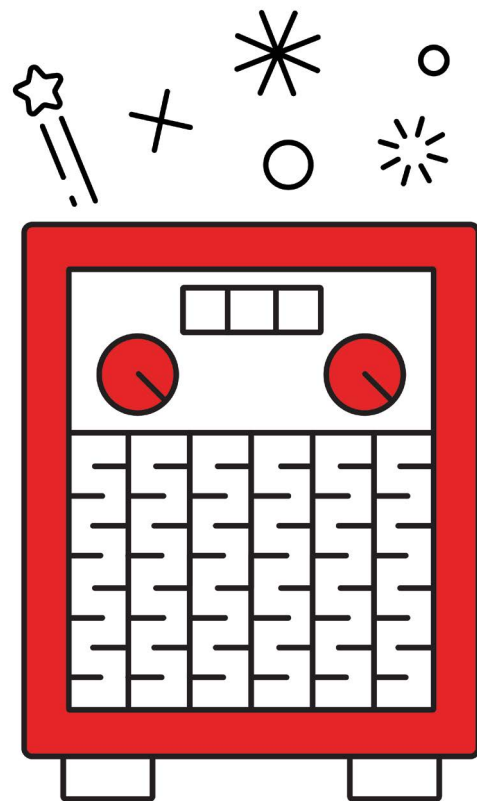
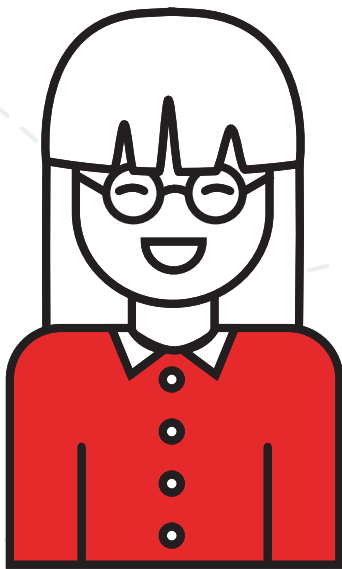
Remember, every business is different. This resource has been written as a guide to help you structure your planning process. Using PR Smith's SOSTAC® framework, each phase of the marketing plan has been broken up into easy-to-digest sections full of best practices, expert tips and actionable techniques.

Many marketing professionals find this framework useful – we hope you do too!



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PART 1: CORPORATE OBJECTIVES; WHAT'S YOUR MISSION?

In advance of your marketing planning, key decisions and business goals should be discussed and agreed.

This should take the form of a **Mission Statement** and overarching **Corporate Objectives**, as illustrated below:

PHASE 1: GOAL SETTING



As the marketing function, your role is to interpret these objectives as desired future direction and translate them into market-led objectives.

These in turn form the basis of an actionable plan that considers your current situation and prescribes the most attractive course of action, compatible with your core internal capabilities.

The diagram (opposite) shows how an organization's planning exists in a hierarchy. If you're operating in the commercial sector, the business objectives are overarching and profit orientated.

The more you can align your marketing activities to your overarching business objectives, the better you can demonstrate how the marketing effort is directly accountable for helping to achieve the corporate mission.

HOW THE B2B MARKETING PLAN FITS INTO THE ORGANIZATIONAL FRAMEWORK:



What's more, the nimbleness afforded by digital marketing tools and real-time data capture mechanisms, lends itself to creating a strong test and learning environment that drives crucial insight back into the business to bolster agility and strategic precision.

For example, this may take the form of isolating a specific industry to target, designing a digital content strategy to drive brand awareness and create cut through whilst closely monitoring response in order to justify greater future investment.

Researching and planning your marketing strategy will help you understand how to achieve the above through reinforcing what makes your business unique, identifying which customers to target and informing the right tactics to leverage.

Once your corporate mission and objectives are set, it's time to kick off your marketing planning process!

PART 2: SITUATION; WHERE ARE YOU NOW?

SITUATION:

Your mission statement and business plan set the ultimate goals for your business, however, situation analysis is required to identify the most profitable market segments, key competitors, your internal capabilities and significant external/internal influencers.

Underpinning your situation analysis is accurate insight revealed by well-structured market research.

Market Research Overview

Research conducted by the marketing function is highly valuable because it provides market intelligence specific to your business. With the digital means to capture real-time data and customer insights, CMOs are in the unique position to conduct and collate research that will help C-Suite decision makers make better informed decisions concerned with the profitability, sustainability and longevity of the organization.

The right market insight can facilitate better decision making and investment by:

- Enabling a deep understanding of target customer segments (essential for data-driven targeting such as ABM strategies)
- Providing visibility into your competitor landscape (crucial in a fast-moving marketplace)

- Identifying new profitable opportunities (essential for business growth)
- Mitigating risk through identifying external threats or influencers (such as political, economic, legal...etc.)

One of the key focuses of the B2B Marketing Plan is to translate all this knowledge into an actionable plan of attack focused on gaining competitive advantage. But before you can even consider strategy you need to stand back and consider your current situation...

Situation Analysis

Many marketers have an instinctive idea of where their company sits in the marketplace, and over time businesses often settle into their niche.

But being comfortable doesn't mean you're in the right place.

With the digital boom creating a level playing field for businesses of all sizes, complacency is a killer. You don't have to look far to see how nimble new businesses and start-ups such as Uber and Airbnb have disrupted the market, dismantling the success of former power giants. Would the latter have made the same decisions if they had been able to better predict what was about to happen?

Equipping your business with the right market intelligence is your only defence in a perpetually shifting and highly competitive landscape. This is one of the many reasons why research is key in your B2B Marketing Plan.

By giving you a bird's eye view of your business and the dynamic environment it's situated in, market research will help you identify who your key audiences are and how you can mitigate risk to gain competitive advantage.

3 KEY AREAS TO CONDUCT YOUR RESEARCH:

1. Your Marketplace
2. Your Competitor Landscape
3. Unique Audience Insight

The Marketing Audit

Before you start formulating the direction you think your business should be heading, take a moment to define your

marketplace - understanding the context your organization operates in is crucial. It's important to be aware of all the different factors that influence your business now and in the future. This is especially important if you're looking at longer-term decision making.

In order to do this, we recommend your research should aim to identify as many of the following as possible:

- Macro-Environmental Factors
- Micro-Environmental Stakeholders
- Key Internal Factors

To ensure your research remains structured, we recommend leveraging an audit model. Here are some of just a few commonly used audits we recommend to kick-off your marketplace analysis:

Key Factors & Influencers

Macro-Environmental Factors	Macro-Environmental Stakeholders	Key Internal Factors
<p>These are external influences the company doesn't have control over but through identification, can respond and factor into your marketing plan strategy, to remove any threats and use to advantage.</p>	<p>Long term relationships with stakeholders are essential to a company's longevity. Both internal and external, different stakeholders have varying influence over the company.</p> <p>Identifying and prioritizing key players helps justify where to allocate resources to nurture long term value exchanges</p>	<p>Auditing your company's internal resources is crucial for identifying core capabilities whilst flagging up areas for improvement.</p> <p>This ensures you have the internal resources to achieve your mission.</p>
<p>Recommended audit: P.E.S.T.L.E. (Political, Economic, Social, Technological, Legal & Environmental factors)</p>	<p>Recommended audit: Mendelow's Matrix</p>	<p>Recommended audit: The 5M's model (Manpower, Materials, Machinery, Minutes, Money)</p>

To ensure you maximize your research findings, it's best practice to run a **SWOT** (Strengths, Weaknesses, Opportunities, Threats) analysis to collate all your audit findings. This makes it easier to gain a comprehensive overview from which to base strategic decisions.

COMPETITOR ANALYSIS

The sustainability, profitability and longevity of your business relies on the ability to deliver superior value to your customers.

Traditionally, this was relatively simple - less choice, accessibility and transparency made price a key differentiator of perceived value and customer loyalty.

In today's multi-channel digital world, full of choice, information and competition, value is a lot more complex - we as marketers, have to work a lot harder to attract, engage and sustain the attention of our audiences.

In response, innovative companies are rethinking the way their business model creates, delivers and captures value. This means, in order to stay relevant, you need to keep a close eye on what these businesses are up to. How are they tailoring their marketing mix to deliver superior value? How are your target audiences responding to these new market entries?

This is why competitor analysis is critical.

Do a sweep of all your competitors, keeping track of all available services/products, features/benefits, pricing strategies, promotional channels...etc. associated with your competitors. The more detail you can capture the better.

Then, like you have for your own business, run a SWOT analysis for each of your competitors. Draw on your research findings of them, how they present themselves and any press you can find. If you have contacts or customers in the industry, ask them for their opinion. The more you can understand who you're up against, the better you can tailor your strategy to achieve greater competitive advantage.

As the competitive landscape is perpetually shifting with new challengers emerging with greater speed than ever before, regular competitor analysis is critical.

CUSTOMER ANALYSIS

Without demand for your products or services you have no business. That's why conducting research about your customers, their needs, preferences and perceptions is vital. This is especially crucial if you are considering changing your current market offering or if you are wishing to leverage targeting tactics such as account-based marketing (ABM) in your strategy.

After all, the success of your marketing campaigns rest on your ability to understand what your audiences want to hear.

Primary Research:

A good start is to dive into your customer database:

- **Who are your most profitable clients?**
- **What are their salient characteristics?**
- **What shared characteristics can be used to govern target audience segment criteria (TAL, ABM lists...etc.)?**

Interrogating your customer database with these types of questions helps you build a deep knowledge of your most profitable customer segments. This enables you to identify who you should be focusing your attention on and how to set the defining criteria. This is also a great way to kick off your ABM planning if that's part of your strategic ambitions.

Whilst analyzing your CRM is a great starting point for observing trends, collecting data from other departments (such as Finance and Sales) can also greatly enhance your research findings.

The following template provides some key considerations:

Customer Research

Customer Understanding

Work with Finance & Sales to understand what knowledge you can gather around customers

How often do customers buy from us on average?

What is our average customer lifetime value?

What is the average spend of our customers?

What level of contact do we have with customers?

What is our biggest cause of lost customers?



Secondary Research:

Some stages of your marketing plan may require outsourcing the expertise of specialist agencies, publications and industry associations. It's always worth considering the long-term benefits of using other credible sources to obtain unique insight that would otherwise be unattainable.

The following research analysis is an example of where secondary data is hugely beneficial, especially if you're looking to build a Target Account List (TAL) and are wanting to sense check the profitability of this audience. For example, you may have identified a list of target accounts that currently represent profitable opportunities, however before you put all your eggs in one basket, it makes sense to check the long-term profitability of this audience segment. This is where the following research is recommended:

Total Addressable Market and Serviceable Available Market

Once you have defined what sort of businesses your target customers are, you can start to work out the Total Addressable Market (TAM) – the overall revenue that is theoretically possible if you had 100% of the market share. Government data, trade groups and research companies can all provide useful secondary data.

Of course, it's not likely you will achieve 100% of the market. Consider which portions of that market are going to be difficult or impossible to capture:

- **those dominated by established competitors**
- **those you don't have the capacity to effectively serve**
- **those that don't suit your strategy**

This will leave you with the **Serviceable Available Market (SAM)**.

Take a step back and look at this figure critically. Is it enough to sustain your business long term? What if you only achieved 50% or 10% of the SAM? Is the market going to grow or shrink? A sanity check at this point can help you identify other options and prevent a lot of stress later down the line.

Building out your Target Account Lists (TALs)

Up until now we have been looking at methods for collating quantitative data that can be used to justify decisions around targeting tactics. However, you cannot solely rely on quantitative data for giving you all the customer insight you need to make the best-informed marketing decisions.

This is a fundamental oversight in an age where customer-obsessed strategies and emotive engagement tactics are dominating the B2B marketing scene.

Therefore, qualitative research is highly necessary if you are to understand how your audiences perceive and 'experience' value. Uncovering this knowledge will pay dividends when it comes to B2B content marketing by helping you understand how to craft content that will resonate most effectively with your target audiences.

The better you can understand your audiences and subsequently what makes them tick, the better chance you have of delivering successful marketing campaigns that drive profitable long-term relationships.

Customer surveys and interviews are a great method for collecting your own primary qualitative data. The below template uses open-ended questions to gather information that will help you construct a customer-centric perspective of your business:

Customer Interview Questions

Our Business	Their Business	Their Process	Market Insight
What do they like about us?	How do they plan? (Budgets, timings...etc.)	How do they research?	Who else do they use?
How satisfied are they with our service?	What do they invest in?	What are their KPIs?	Who do they like?
What do they not like about us?	What are their challenges/pain points?	What are their objectives?	Who are they interested in?

How to enrich your B2B targeting strategy with audience insights

From your customer analysis you will have identified who your most profitable audiences are whilst collating further qualitative data that will help to inform your B2B content marketing strategy. This requires not only knowing who your audiences are but also more granular insight into their preferences, pain points and buying behavior.

Knowing as much about your target audiences as possible will significantly improve your marketing activity by enabling greater personalization and relevancy. In order to acquire the best insights, most B2B marketers must consider the role of first, second and third party data in helping to shape better customer understanding and data-driven targeting techniques.

First party data

First party data can be captured through your CRM and owned channels such as website behavior and cookie data. As it

comes straight from your own audience it is highly valuable, yet somewhat restricted – especially if you are looking to reach new audiences or wishing to identify where your key audiences go for information when they're not on your owned channels.

Second and third party data

Audience scale, depth and diversity are all benefits second and third party data can provide. When used in tandem with first party data, insight rich audience profiles can be generated that provide all the knowledge you need to build effective customer-centric communications. These include real-time digital body language signifiers such as:

- Intent signals
- Interests
- Trends
- Preferences
- Regional Nuances

By gaining a deep audience knowledge, you are better positioned to know what your target audience want to hear, how they want to hear it, and when.

KEY CONSIDERATION

Whether you are planning to conduct your research internally or externally, a research plan is highly recommended. This will ensure

your research remains focused in order to return the most relevant market intelligence for your business. To demystify the B2B marketing research planning process, we've put together these useful checklists:

The Research Planning Process

Stage 1	Stage 2	Stage 3	Stage 4
Purpose	Population	Procedure	Publication
Why does the research need to be conducted?	Who makes up the marketplace? What are the key criteria for segmenting?	How should the research be conducted?	How can we translate data into marketing intelligence
<p>Defining the problem ensures the research is focussed, meaning marketing intelligence gathered will be more specific and useful in informing the marketing plan.</p> <p>Formulating a marketing objective is recommended at this stage in order to direct the research outcome.</p>	<p>Identifying the target audience for your research is the next step.</p> <p>How you segment your audience will be directly influenced by the research objective set in the first stage.</p>	<p>The main considerations for research methodology are:</p> <ul style="list-style-type: none"> • Is qualitative or quantitative data more useful in achieving research objective? • What mix of primary or secondary data should we use? 	<p>By collating data into a report that analyses and evaluates findings, you can begin to construct useful marketing intelligence that provides relevant insight into the marketplace.</p>

4 Key Components of a Research Briefing

1	2	3	4
Purpose of Research	Research Objectives	Timeline	Resource Allocation
The primary aims of the research including specific aspects of the market demand research, need to be clearly articulated to researcher.	Through transforming marketing problems into concise statements ensures quality information is produced that will help in strategic making decisions .	<p>Agreed deadlines are essential for ensuring the research is conducted in a timely manner and defines the scale of the programme.</p> <p>To ensure the research programme sustains focus a reporting schedule is recommended.</p>	<p>Both budget and facilities need to be considered and allocated.</p> <p>Setting resources also has a direct impact on the methodology and sets restrictions on the scope of the research programme.</p>

PART 3: OBJECTIVES; WHERE DO YOU WANT TO BE HEADING?

OBJECTIVES:

These set direction and determine tactics, forming the rationale behind all planning decisions.

SETTING YOUR OBJECTIVES

Now you have a understanding of your marketplace, your core company capabilities and your most profitable customers, it's time to set your objectives.

Why are objectives important?

Marketing objectives form the base of your strategy and are essential in ensuring all

activities and efforts are focused towards achieving the same goals.

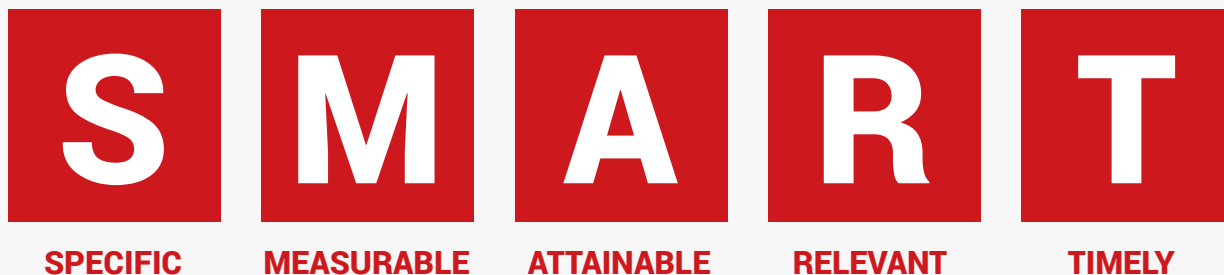
Start with your overarching business plan and build down. For example, if your organizational goal is to increase market share, your marketing objectives may be set around the following:

- Growing your customer base
- Increasing sales
- Entering new territories
- Launching new products/services

These objectives set the direction for your company. Your strategy dictates what approach you should take to get there.

INSIDER TIP

To make your objective setting even more effective, you may want to leverage the S.M.A.R.T acronym:



Running your proposed objectives against each of the above is a common technique used by many marketers to ensure they are realistic, robust and trackable.

PART 4: STRATEGY; WHAT'S YOUR GAME PLAN?

STRATEGY:

This provides a blueprint of how to get there through reviewing and analyzing options revealed from research and prescribing best course of action.

From your research you will have established:

- **Market conditions (short & long term)**
- **Your internal capabilities**
- **Your competitor landscape**
- **Your most profitable audience segments**

Whilst directly addressing your marketing objectives, your strategy should act on all your key research findings, prescribing the best methods for organizing your internal capabilities to meet demand and offer superior value to your target segments.

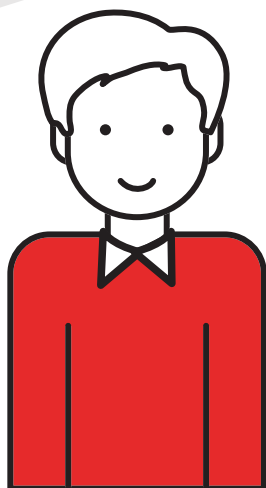
For example, your objective may be focused around increasing sales by entering a new market that your research identified as being a good fit for your product/services.

In order to ensure you service this market in the most profitable way, you must consider how to align your internal capabilities to fulfil the needs of your identified audience, better than any competition.

What's more, you want to consider how you can optimize any processes to limit waste and maximize profits.

Most likely you'll have more than one marketing objective, in which case you need an overarching strategy that addresses how each objective can be achieved. This may include outlining how a set of interconnecting marketing programs (with their own strategies) will work together to achieve the ultimate goal.

As many businesses recognize the importance of full customer lifecycle marketing, demand generation is a key area many marketers are focusing on as a holistic strategy that embraces both effective customer acquisition and customer retention programs.



MARKETING OBJECTIVE 1:

Increase new sales by 20% by entering new territory in 12 months (requires acquisition strategy)

MARKETING OBJECTIVE 2:

Increase repeat revenue from existing customer by 10% in 6 months (requires customer retention strategy)

RECOMMENDED OVERARCHING

MARKETING STRATEGY: Demand generation

Take this example:

Marketing Objective 1: Increase new sales by 20% by entering new territory in 12 months (requires acquisition strategy)

Marketing Objective 2: Increase repeat revenue from existing customer by 10% in 6 months (requires customer retention strategy)

Recommended Overarching Marketing Strategy: Demand generation

Through creating a demand generation engine, you can design a range of marketing programs spanning the full customer lifecycle, helping you achieve both marketing objectives. This could include:

- **Acquisition:** Leveraging publishers with an established subscriber base to launch campaigns in EMEA to grow awareness and reach new audiences that fit criteria
- **Retention:** Running a customer success program that builds loyalty and brand advocates

Complementary strategies:

Content marketing: designing and organizing your communications to address every stage of the buyer's journey, generating value at every touchpoint.

Digital marketing: creating a digital ecosystem to guide your target audience through the buyer journey using the right channels and inbound/outbound tactics.

Segmentation/Targeting (ABM/lookalike...etc.): using data-driven tactics to better understand, identify and engage with the best fit audiences for your product/services.

Once you've identified and documented your course of action, you need distil your research findings down into a value

proposition and your unique selling points.

Defining your value proposition and Unique Selling Points (USPs)

VALUE PROPOSITION:

This is how you articulate to your prospects how your products/services will provide superior value.

UNIQUE SELLING POINT (USPS):

This is something that sets you apart from the competition.

If you serve a number of different markets, you may find you have a variety of different value propositions and USPs for each segment.

But remember; if you set out to be the biggest or fastest, but you can't achieve those criteria, you will lose trust and brand authority.

Brand authority is something that is hard to define but, as **Forbes** puts it, "it mostly comes down to trust." Customers trust you perhaps because you have **proven your level of expertise**, because you have **demonstrated a consistency to customer service**, or perhaps simply because **you have been in the industry for a long time**. Because they feel comfortable listening to you and spending money with you, all your marketing efforts will perform better.

Brand authority is difficult to pin down and to actively focus on. Consistency, active listening and long-term strategic thinking are needed to define and build your reputation across your industry.

BUILDING YOUR TARGET AUDIENCES

The more you can understand your target audience, the better you'll be able to tailor your marketing mix (see part 5) to provide the most attractive value proposition and USPs that outstrip your competitors'.

Using the following questions to help shape further research will return the most useful insight to inform your strategy and marketing activities:

- **What will attract your prospects to you? (pain points/challenges)**
- **How does your product/services solve their problem?**
- **How will you provide added value?**
- **How are your competitors not fulfilling need?**
- **Who/what influences demand (external and internal)?**

Once you have your value proposition and USPs, you can put this knowledge into further action by building audience

personas. Audience personas are a highly effective way for ensuring you match your USPs and value proposition to the right audience in order to create the most effective communication programs.

Some of the information in a persona is directly relevant and actionable: for example, job titles, responsibilities, and research goals. However, to help the personas "come to life", they are also often accompanied by fictional biographies including photographs, family background, and interests. These are more illustrative than factual but can help marketers get a feel for them as individuals.










The most critical elements of any persona are those which inform your marketing efforts. What role do they play in the purchasing decision, and how can you help them in that role? Think about the following:

- **Questions they have**
- **The channels they prefer to use**
- **The best format for providing information**



This template has been designed to help kick-start your persona building:

Tailor Audience Approach

Audience	Strategies	Activities
Target Persona 	Marketing Goals 	Marketing Channels 
Personal Pain Points 	Key Strategies 	Tactics & Campaigns 
Customer Journey 	Pricing and Positioning 	Measures of Success 

Decision Making Units (DMU)

There is a temptation to focus solely on the budget holder when deciding who to target, however, there is usually more than 3 people involved in a B2B purchasing decision.

Often B2B purchasers are part of a decision making unit (DMU), made of different roles, levels of influence and addressing different stages of the buying process. These stages can involve different individuals

and teams, each with their own questions, responsibilities and concerns. As each of these can influence the end result, marketing needs to consider each of these individuals, not just those making the final decision.

This means when crafting your personas, you may want to construct several for each account, to cover the whole of the DMU. This insight can ensure you pitch the right content to the right person.

PART 5: TACTICS; HOW EXACTLY WILL YOU GET THERE?

You've set your objectives and you've identified the best strategy and audience segments, now it's time to further qualify how you're going to get there. This is where tactics come in.

TACTICS:

This is the mix of corresponding programs that support your strategy to deliver set objectives. They provide pathways for matching your business agenda with customer need, in the most profitable ways.

The Marketing 4Ps originally created by **E. Jerome McCarthy** is one of the top 3 classic marketing models. With many spin offs, including Booms & Bitner's 7Ps, these marketing models still provide many marketers a valuable tool for aligning tactics with their overarching strategy.

Many tactics may be deployed to achieve your objective, what's important is that they are applied with the knowledge of **why** and **how** they are going to be leveraged to achieve it.

Using the Marketing 7Ps to plot out your tactics is an effective approach leveraged by many marketers. Think about how each component of the marketing mix can be tailored to best accommodate each of your target persona's needs in the most efficient way whilst driving the maximum value.

For example, think about how Uber and Airbnb have tailored their marketing mix in comparison to traditional transport and hospitality providers. By embracing technology to service demand and capitalize on gaps in the market, they have successfully established competitive differentiation and market domination.



Crafting a content strategy to deliver your USPs and value proposition

At this stage you will probably find there is a lot of information you need to share to a variety of audiences. To make sure everything is addressed, you will need to create a content strategy and plan.

Content Plan Goal:

Map the right content to the right audiences at the right stage of the buying journey.

Here's an example of how a content plan can help support a demand generation strategy:

<p>1. Create content around prospects problems - eBooks, blogs, infographics, that the sales team can push out to drive credibility</p>		<p>Drive brand awareness Paid media activity - digital advertising, social media, SEO and events</p>
<p>2. Help buyer identify needs in solving their problems - Prospecting, build credibility through white papers, case studies and industry reports</p>		<p>Generate Leads Run nurturing programs and events where prospects will be found, create sales efficiency by focusing on the best leads</p>
<p>3. Validate Opportunities by understanding where prospects are in the process - Qualifying opportunities and proposing path for prospect to drive quality</p>		<p>Lead Nurturing Targeting content, nurture workflows and behavioural insights through - calculators, testimonials, product reviews, sales presentations</p>
<p>4. Onboarding messages and surveys - User guides, product information and thought leadership, understanding customer satisfaction</p>		<p>Retention Engagement and Enrichment Onboarding Programs, engagement campaigns and referral campaigns</p>

Having a plan is the best way to make sure you give enough attention to all the different areas. Different types of content will often have different roles within your marketing mix. Each phase of the customer journey requires different formats, which catch attention, give insightful information, and increase your chance of consideration throughout the buyer's journey.

“THE TARGET AUDIENCE IS A CRITICAL INFLUENCE ON THE COMMUNICATOR'S DECISIONS.”
KOTLER & KELLER, 2008

The topics you cover within your content should be based around the needs of your target audience. Crafting truly useful content takes a lot of effort, but means that you will see a much better response when it reaches the right people.

In defining customer personas you have already given some thought to what your customers want to know. Brainstorm ideas; try to put yourself in their position. Content should always have a purpose, either for your company or the customer. If you have answered one question, what will their follow-up question be? How can you make their lives easier? Are there any facts or figures that will be of use – industry information, product comparisons, user reviews? Are there any current issues or topics that are relevant to your customers?

Bring these ideas together into key themes or stories that will form the structure of your campaigns.

CONTENT TYPES AND FORMATS

Content isn't always just text, of course. Different channels suit different formats, and each persona will have a preference for channels and formats. Purchasing departments may want a no-frills comparison table of product specifications,

“Here's 25 different content formats to shake up your strategy”

Visual

- Webinars (Live and On Demand)
- Videos (Traditional & Interactive)
- Memes
- Infographics
- Virtual Reality
- Display (banners, GIFS)
- Animations
- Social Images
- LookBook
- Slideshares

Audio

- Podcasts
- Voice App
- Digital Radio
- Audio Books

Written

- Analyst Report
- How-to Guide
- eBook
- Workbook
- Checklists
- Business Case
- Case Studies
- Vendor Guides
- Reviews
- Interactive PDFs
- eNewsletter



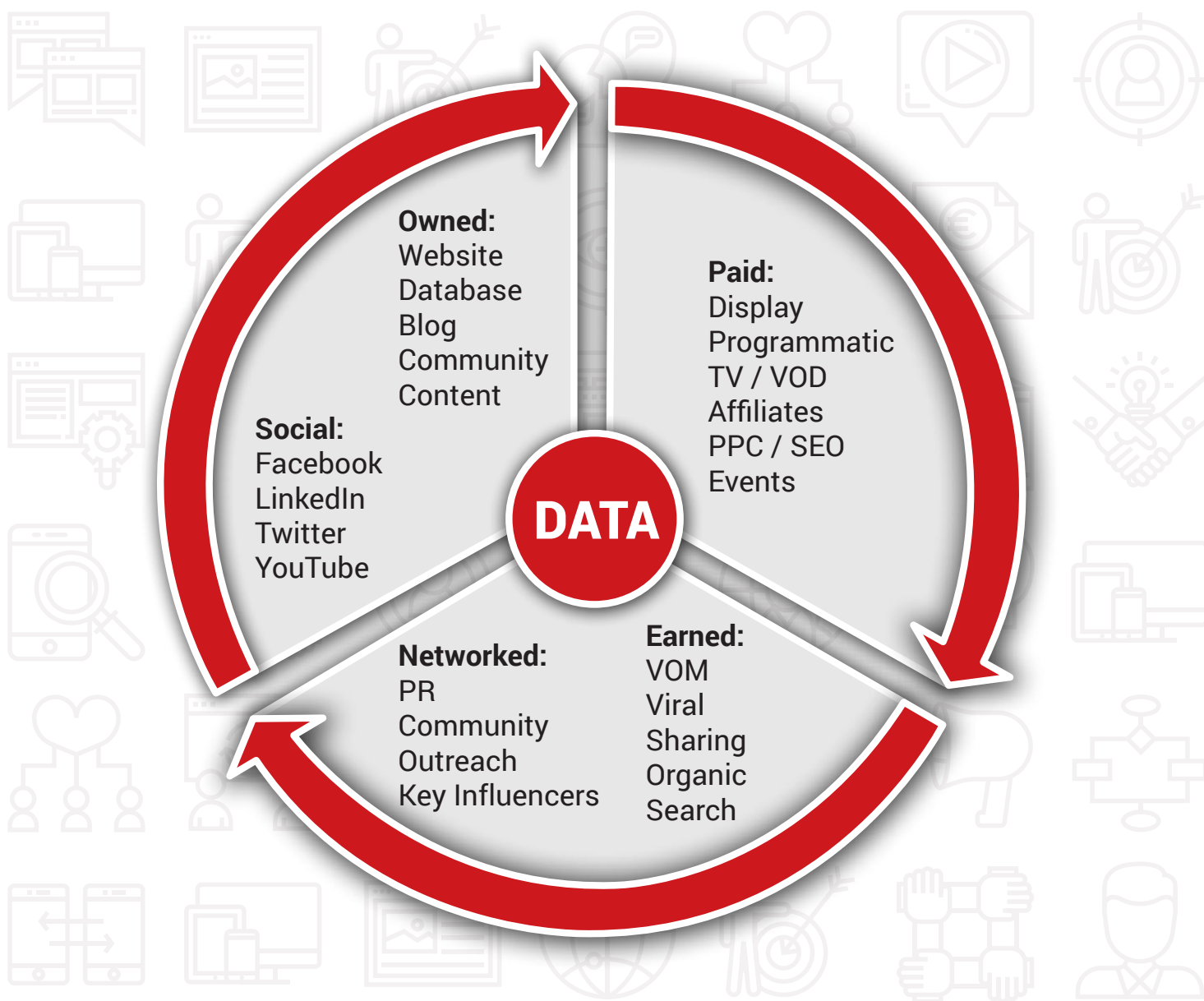
while end users may want to see user guides in video format and your sales team may want performance data or customer reviews they can refer to in meetings.

Once you've identified the content you need to create in order to attract, engage and convert your target audiences, you need to develop a set of marketing programs that focus on delivering these assets and messages to the right audience, at the right time, in the right way.

CHANNEL MIX – WHAT CHANNEL TACTICS ARE YOU GOING TO USE TO DELIVER YOUR STRATEGY?

When developing your marketing plan, consider all the assets and channels you have at your disposal, and consider how they will work together. Not only is it important for you to be wherever your customers are, campaigns that span multiple channels have greater impact.

A broad overview of the marketing channels:



RECOMMENDED ACTIVITY:

Review all your current communication activities and campaigns to help identify which channels have historically worked best, any limitations and any areas for improvement:

- **What are their strengths and what are their weaknesses?**
- **What's been successful, what's been unsuccessful?**
- **Have you the in-house expertise to fully leverage channel potential?**
- **Which channels remain out of reach due to budget/expertise/lack of experience?**

This activity will help you identify which channels and activities have already worked for you, whilst identifying areas to improve. This knowledge will help you begin building out your channel ecosystem.

Don't forget to also draw from your research; understanding which channels your audiences respond to best, at different stages of the buyer's journey, should govern your channel selection. You must also be able to justify how your channel mix will help you achieve your marketing strategy.

As this diagram shows, this can be achieved through assigning goals against each activity to justify their purpose within your channel tactics.



Once you've mapped out the best channels for amplifying your content to your target audience, the next step is to develop your tactics into a set of cohesive marketing campaign programs.

Referring back to the example used in Part 4, this may look like the following:

Marketing Objective 1:

- Increase new sales by 20% by entering new territory (12 months)

Recommended Marketing Acquisition Program:

- Digital content amplification campaign

Campaign Objective:

- Generate 120 MQL leads in France every quarter.

Campaign Tactic:

- Generate awareness/early interest
- Leverage credibility of online industry bulletin and content hub to engage with new audiences that meet persona criteria.

Main Content Asset Format:

- Interactive PDF

Paid Channels:

- Industry bulletins
- Sponsored content on online content hub
- Programmatic display

Owned Channels:

- Landing page with lead capture
- Targeted webpages

Key Performance Indicator (KPI):

- Number of MQLs generated

Marketing Metrics:

- Number of landing page conversions (content request form completions)
- Number of direct web referrals
- Number of email bulletin clicks
- Number of served programmatic ad impressions (served to target audience)

No marketing program should work in isolation. The following diagram shows how mapping all your programs into one matrix will help ensure all activity is aligned to your overarching strategy (in this case a digital content marketing strategy):



Digital Campaign Planning Template

Awareness	Interest	Decision	Action
Promo Content: <input type="text"/>	Promo Content: <input type="text"/>	Promo Content: <input type="text"/>	Promo Content: <input type="text"/>
Paid Channels: <input type="text"/>	Paid Channels: <input type="text"/>	Paid Channels: <input type="text"/>	Paid Channels: <input type="text"/>
Content Format: <input type="text"/>	Content Format: <input type="text"/>	Content Format: <input type="text"/>	Content Format: <input type="text"/>
CTA(s): <input type="text"/>	CTA(s): <input type="text"/>	CTA(s): <input type="text"/>	CTA(s): <input type="text"/>
Owned Channels: <input type="text"/>	Owned Channels: <input type="text"/>	Owned Channels: <input type="text"/>	Owned Channels: <input type="text"/>
Content Format: <input type="text"/>	Content Format: <input type="text"/>	Content Format: <input type="text"/>	Content Format: <input type="text"/>
CTA(s): <input type="text"/>	CTA(s): <input type="text"/>	CTA(s): <input type="text"/>	CTA(s): <input type="text"/>
KPIs:	KPIs:	KPIs:	KPIs:
Paid Channel Metrics: <input type="text"/>	Paid Channel Metrics: <input type="text"/>	Paid Channel Metrics: <input type="text"/>	Paid Channel Metrics: <input type="text"/>
Owned Channel Metrics: <input type="text"/>	Owned Channel Metrics: <input type="text"/>	Owned Channel Metrics: <input type="text"/>	Owned Channel Metrics: <input type="text"/>

PART 6: ACTION PLAN; WHO DOES WHAT AND WHEN?

ACTION PLAN:

This is the implementation of tactics. Using your market research helps set realistic KPIs, set budget, allocate resources and delegate activities to specific functions.

LEAD FULFILMENT AND NURTURING

In order to execute your plan with greater precision, it's important all roles are clearly defined, along with the allocation of timescales, budgets and expectations.

This helps ensure everyone is working to the same agenda. This includes onboarding other departments, in particular, sales as many of the marketing objectives will be broken down into sales targets.

What's more, if you're looking to execute a demand generation strategy that spans the whole lifecycle, it's critical your sales department are working from the same page.

As there is a strong correlation between documenting processes and success, it's important to translate your action plan into a series of corresponding tasks that are assigned to different roles/departments.

Task Setting Framework

Task Description:	
Agreed Goal:	
Assigned to:	
Budget:	
Timeframe:	
Deadline:	

PLANNING FOR SALES AND MARKETING ALIGNMENT

Conflicts between sales and marketing teams are common whatever the size or type of business. According to [Harvard Business Review](#), part of this is down to differences in perspective: marketers think in terms of customer segments and remote analysis, while sales people focus on individual people and relationships. While many areas of the marketing plan don't need to involve sales, there are key points where collaboration will help both parties.

Gathering customer insights

Sales teams meet their customers, often face to face. They know the questions customers ask time and again and what their concerns are. By collaborating on content, sales teams get access to tailor-made collateral while marketers get fresh inspiration.

Defining when to hand over a lead

At some point, marketing hands over to sales. What exactly a marketing qualified lead (MQL) looks like needs to be agreed

between both parties. Marketing may decide there is a point at which they have generated the right type of lead and nurtured it, but sales may feel that the prospect is still some way from making a purchase. If leads are handed over too soon or too late this will cause friction and potentially lose business.

Internal education around what your campaigns can deliver is vital for defining the difference between a marketing qualified lead (MQL) and a sales qualified lead (SQL). A service level agreement (SLA) about when to pass over a lead can reduce confusion and ensure that certain conditions have been met before following up – such as a series of engagements with your brand.

When using lead nurturing campaigns, prospects can be given scores which increase every time they open emails, download information or interact with the website. Usually, when this score reaches a certain number the lead is considered marketing-qualified and passed to a sales person. To ensure the score is not arbitrary and that it genuinely indicates a potential sale, sales must be involved in the design of the scoring system.



MARKETERS THINK IN TERMS OF CUSTOMER SEGMENTS AND REMOTE ANALYSIS, WHILE SALES PEOPLE FOCUS ON INDIVIDUAL PEOPLE AND RELATIONSHIP.

Agreeing on who gets the credit

Arguments over who “won” a sale or “found” a prospect can cause tension between sales and marketing. Marketing needs to demonstrate effectiveness to maintain budgets, but sales people usually earn bonuses on the number of sales won and prospects found. A sales person might do individual research and target a customer who is already known to marketing; who won the sale?

Digital marketers are already familiar with the idea that sales usually come from multiple touchpoints, not one single action. Individual credit is less important than acknowledging the effectiveness of a team effort and its strategy. By setting Key Performance Indicators (KPIs) and rewards that are appropriate to each team, it should be possible to leave no room for argument.

LIFECYCLE NURTURE PROGRAMS

Following up leads is a vital part of B2B marketing and sales management, but it can be time-consuming and frustrating, particularly with long sales cycles. At its most basic, lead nurturing enables you to automate follow-up emails to keep those leads warm. In more sophisticated setups, it can be used to guide individuals through the entire purchase process with tailored content, timely reminders and integrated multichannel communications.

Lead nurturing is often used to incrementally gather information about the user as they return to landing pages to download more information. In this way, you can gradually build up a detailed profile of the business and its requirements long before they make a formal enquiry.

Lead nurturing takes over part of the traditional role of a sales person. The information sales teams want you to gather may be different from the information marketers are interested in. For that reason, it's critical that sales teams are involved in the development of the plan and any content.

FOLLOWING UP LEADS IS A VITAL PART OF B2B MARKETING AND SALES MANAGEMENT, BUT IT CAN BE TIME-CONSUMING AND FRUSTRATING.



PART 7: CONTROL; HOW DO WE MEASURE SUCCESS?

CONTROLS:

These are essential mechanisms for evaluating your strategy through identifying how and where refinement or improvements are required. By capturing data and benchmarking activity success, they are crucial for showing if you are on target for achieving the corporate objectives.

Control mechanisms are crucial for every campaign but it's important to establish the difference **between Key Performance Indicators (KPIs) and metrics**. Both are important marketing measurements used to evaluate the effectiveness of your marketing efforts.

However, the difference occurs in where you apply these measurements:

KPIs support your overarching strategic objectives and goals, providing a critical marketing measurement to aim for. They can also provide an early warning system if performance is slipping.

Metrics provide a quantifiable measurement and are directly aligned to your tactical goals (the activities, actions or processes you have taken to achieve your overarching objective and KPIs).

Revenue, turnover or profit are very high-level KPIs that demonstrate the business impact of marketing efforts, and are the figures senior directors are most interested in.

Sales teams and their targets often revolve around these types of measurements. For a marketing team it can help to focus on Marketing Qualified Leads (MQLs) to avoid confusion and provide a view of the opportunities in the pipeline that marketing is creating. For example:

- **Number of Marketing Qualified Leads (MQL) generated**
- **Cost per acquisition (CPA)**
- **Customer Lifetime Value (CLV)**
- **Recency, Frequency and Monetary Value (RFM)**

As the focal point for a large part of marketing's efforts, the website can provide some relatively top-level stats. Traffic numbers, bounce rates, new visitors, new subscribers and so on provide an indication of how digital marketing as a whole is performing.

Drilling down further requires KPIs that are specific to each campaign. If they are going to be reported outside the marketing team, you must make sure they relate to other elements or business objectives. For example, can you make a connection between the number of people who opened your email and the number of incoming enquiries?

Thinking about KPIs in this way will also enable you to forecast campaign performance in ways that are meaningful to other departments and directors. Marketing is an increasingly strategic role that influences how a company responds to changes in the marketplace. By choosing KPIs that you can connect directly or indirectly to business objectives, you will add credibility to your plans and ensure your strategy remains relevant to the whole of the company.

CONCLUSION

A good marketing plan will help you understand where you are, where you're headed and how you can get there - along with the right control mechanisms to keep you on track.

There are many theoretical models and planning tools widely accessible - how you apply them is entirely dependent on your own unique business goals.

However, the more time you invest in systematically researching and plotting

your marketing plan, the stronger your strategic attack, and the greater the likelihood of success.

What's more, the marketing planning process itself is an effective way of getting all of your stakeholders onboard, ensuring you all share the same vision, knowledge and agenda.

MORE FROM OUR MARKETING ESSENTIALS SERIES:

- **A Guide to Persona Planning**
- **6 Step Guide to B2B Demand Generation**
- **4 Insider Tips for Lead Generation**
- **4 Principles for Nurturing Leads**



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Inbox Insight are digital marketing experts specializing in translating your objectives into content-fuelled campaigns that drive your message home to the right professionals.

Through a combination of data-driven tactics and marketing expertise, we’ll help you surround your target audience with the content they want to read, using the most effective digital channels to amplify your message.

HERE’S HOW...

1. We know what over 3.5m active decision makers want to read

Influencers through to C-Suite and Senior decision makers use IFP, our content platform, to stay up-to-date, research areas of interest, solve their challenges and learn more about products and services. Through the millions of insights our IFP members share with us, we are able to deliver relevant content, based on topics, real-time trends and business areas they are most interested in.

This removes the guesswork and increases the effectiveness of your digital campaigns.

2. We know how to get your content working harder

With thousands of campaigns under our belts, we know a thing or two about content strategy.

With Inbox Insight you benefit from the best content support from our experienced in-house copywriters and campaign executives.

Whether it’s running a campaign in multiple regions or optimizing content for better engagement, our team of experts are able to identify ways to continuously improve your campaign outcomes.

3. We Know the importance of the channel mix

Content amplification means getting the right content to the right audiences in the right way. With a **versatile product suite**, we are able to tailor the right multi-channel tactics to deliver your campaign objectives.

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To find out how you can kick-start your own campaign, **visit our website** or **get in touch today**.





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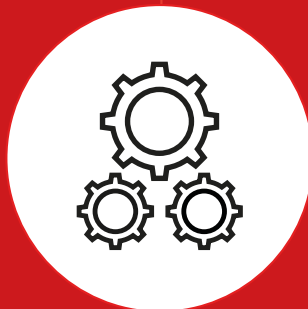


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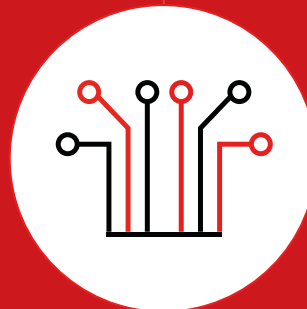
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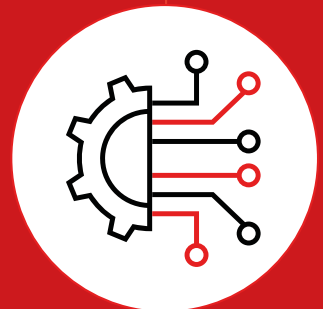
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