

Preparing For Your 12-Month Marketing Plan

*TREW's Guide to Getting Your
Marketing Team, Sales Team, and
Business Leaders Ready for Your
Annual Marketing Planning*

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About TREW Marketing

At TREW, we strive to be the smartest, most collaborative marketing partner in the world serving engineering, science, and technology companies. We hold each other to a high standard, always remembering our motto, Trust Drives Results, and living our core values of Excellence, Strategic Thinking, and Drive.

We ask smart – sometimes tough – questions to better understand the heart of your business and the intricacy of your technical products, services and customers' applications. These discussions allow us to create or strengthen your distinct brand image and position, and develop a customized marketing plan that maximizes resources and drives business results.

Unlike firms that specialize in one media channel – such as PR or SEO firms – we are full-service, channel agnostic. We draw on our years of marketing strategy and execution across a broad spectrum of services – with a team that brings deep expertise across channels – to develop a smart, integrated marketing plan that prioritizes the right media channels, in the right order, to generate leads, drive new opportunities for sales, and help you achieve your business goals.

Introduction

Your 12-month marketing plan is an agile document and should be designed with flexibility in mind, customized to your business goals and needs. Plan for the future and measure progress along the way, and keep in mind that new opportunities, market changes and developments, and the results of your marketing activities are all data points that you should use to constantly refine and update your plan. Understanding how and where potential customers find information, you'll be in a better position to strategically plan ways for them to find your content and drive results to meet your business goals.

In this e-book, we at TREW Marketing outline the steps we recommend you take to prepare for your marketing plan.



A marketing plan is both practical and powerful: it is a blueprint to effectively facilitate activities focused on making you visible in search, driving visitors to your site and converting them to leads and customers

- Lee Chapman, Account Director, TREW Marketing

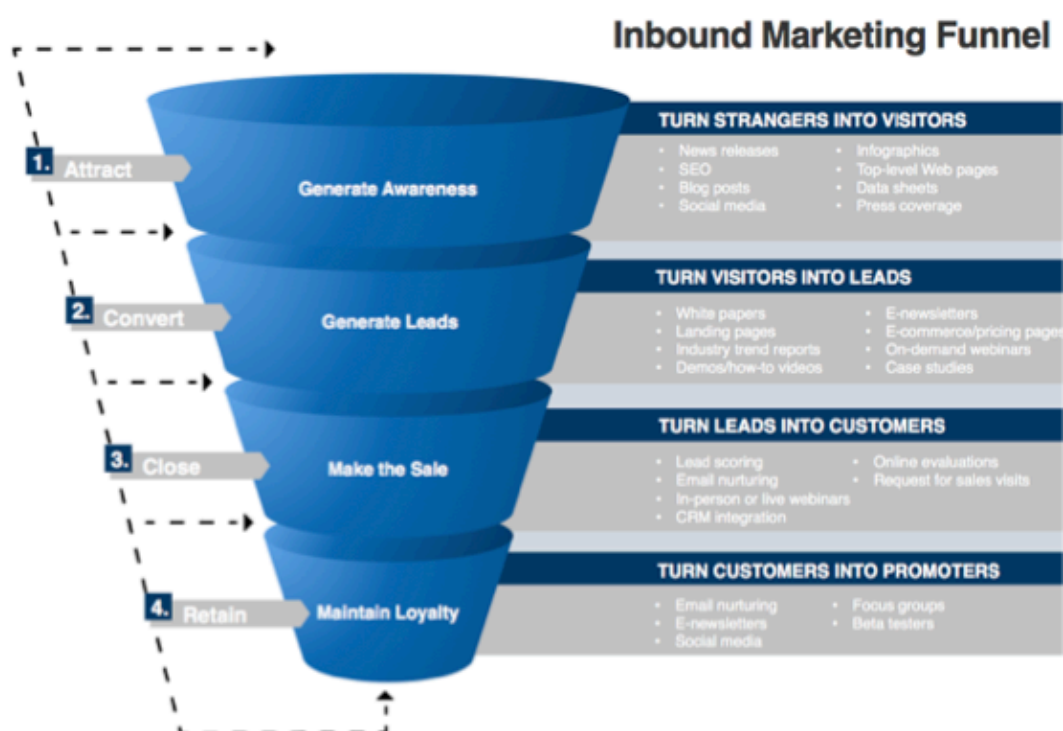


Step 1: Before a Marketing Plan Comes a Business Plan

Many times in marketing planning, companies consider their marketing plan finished when they list the disparate tactics needed to execute specific wants and needs, such as a website redesign or blog implementation. Then, they dive right into the execution without remembering the purpose, setting expectations, or prioritizing resources.

Instead, they rush down any road that looks promising at the moment. Unfortunately, these unplanned roads lead to mediocre results and higher costs, in time, money, stress and frustration. It is important to take the time to define your marketing plan and formulate an investment strategy to reach your business goals.

Before jumping into the tactics and execution, your marketing team should ask the leadership team to define their business goals for the next 1-3 years. This includes understanding your key products and services, the differentiators between your competitors, your target audience groups or “personas”, and the competitive landscape you face. This closely informs how you prioritize campaigns and helps you define how to measure results.



Map Content and Initiatives to Your Marketing Funnel

Your marketing plan acts as a guide to outline your marketing initiatives so you can be sure you are engaging prospects throughout the entire funnel.

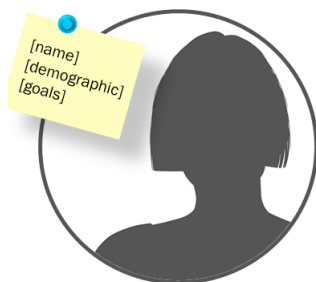
Mapping content and assets along the buying cycle inventories the content you have and need in order to engage your personas at every level of their buyer journey.

Step 2: Define Your Ideal Customer: Your Personas

Buyer personas are fictional representations of your ideal customers based on real data pertaining to customer demographics and online behavior as well as your educated speculation about their personal histories, motivations, and concerns. With personas, you can put faces to your customer segments and gain the ability to better customize your marketing efforts – from messaging to activity selection – and make a greater impact with your prospects.

It's best to limit the number of personas to three when you first start and then build from this level to further refine your personas and generate new ones as needed.

Once you have your buyer personas defined, you can be much smarter about your monthly content calendar planning and lead nurturing efforts. A new lead generated from a white paper or other premium content isn't necessarily ready to speak with sales or make a purchase from you. You need to nurture that person over time, building trust and credibility between your company and the lead as he or she gains knowledge of your products and services.



Systems Engineer Sam

- Professional Engineer (PE)
- Male, late 30s, early 40s
- Values: process automation, career opportunities
- Fears migrations of legacy systems due to cost and risk

To create a buyer persona, identify the following pieces of information:

Who are they?

- List their demographics, such as gender, age, and education

What is their job?

- Describe them using data such as title, company size, industry and general job responsibilities

What is a day in their life like?

- Describe what an average day is like for them, who they are dealing with and what decisions they are making

What are their primary pain points?

- Describe the primary challenges they are trying to overcome that relate to your products and services

What do they value most and what are their goals?

- Explain what they value most in making a purchasing decision (price, support, etc.) and what they are trying to accomplish in each application

Where do they go for information?

- Identify the primary sources they use to gather information in their research and purchasing decision process

What's important to them when they select a vendor?

- List what is most important, such as being a technology leader, having proven experience, being a domain expert, etc.

What are their most common objections?

- List the reasons you hear most often for why your solutions won't meet their needs

Step 3: Analyzing Your Previous Marketing and Sales Metrics

Writing a marketing plan without reviewing your recent marketing performance is like using Google Maps without defining a starting point. Knowing where your marketing is today (that is, what it's doing for you today) is absolutely essential as you decide where you want it to take you next year. If your CEO asked you today to create a year-to-date report card marketing performance, what would you report on and how would you grade it?

Your metrics help set and define realistic marketing goals, such as growing inbound Web visits, capturing qualified leads, or growing your brand awareness. It also uncovers any necessary foundational projects, which may include redesigning your website, refining your corporate and product/services messaging, or adopting marketing automation software such as HubSpot.

AAA Company 2015 Marketing Scorecard							
Corporate Campaign: Increase website visits that convert to leads	Owner	Jan	Feb	Mar	Q1 Total	Q2 Target	2015 Results
Average 3,200 web visits per month/9,600 a quarter/38,400 year	TREW	2,779	2553	3,685	8917	9600	
Increase website content (goal = 42 for the year)	TREW/AAA	3	1	0	4	7	
Have direct contact with each lead within 24 hours	AAA	Y	Y	Y	Y	Y	
Product Campaign: Generate demand for Product AA	Owner	Jan	Feb	Mar	Q1 Total	Q2 Target	H2 Result
Convert 2.2% of web visits to leads each month	TREW/AAA	2.0%	1.3%	1.5%	1.6%	2.2%	
Grow Product AA leads by 20% to 178 leads in 2015; or 44 per quarter/15 per mo.	TREW/AAA	8	4	15	27	44	
Increase organic traffic to at least 1,780 per month (5340 per quarter; 21,360 for year -- 30% increase YOY)	TREW	1,390	1,392	1,893	4,675	5,340	
Partner Channels: Build awareness of Product AA and key wins	Owner	Jan	Feb	Mar	Q1 Total	Q2 Target	H2 Result
Grow referral visits from partner site to 400 in 2015; or 33 per month, 100 a quarter	TREW/AAA	31	25	25	81	100	
Submit 2 case studies	TREW/AAA	n/a	n/a	n/a	n/a	1	
Create 2 newsletters	AAA	n/a	n/a	n/a	n/a	n/a	
Send quarterly project report	AAA	n/a	n/a	1	1	1	

Green = >90% of goal
Yellow = > 70% of goal
Red = <70% of goal

Created by
TREW
MARKETING

This is an example Marketing Scorecard TREW uses that tracks metrics against goals and previous timeframes.

Step 4: Develop Meaningful KPIs

Now that you've looked at your previous sales and marketing metrics, you're ready to set the new key performance indicators (KPIs) for the upcoming year(s).

This should include collecting and measuring pre-determined metrics, tied directly to your set goals, to evaluate on a regular basis. This clarifies your objectives and reveals the modifications necessary to strengthen your plan. Envision where you see your business at specific milestones.

Some commonly tracked KPIs that track your efforts towards your business goals include:

- Marketing Qualified Leads (MQLs): Leads generated by marketing that fit within the target criteria
- Sales Qualified Leads (SQLs): Leads further along in the funnel (after MQLs) that have expressed some type of intent to purchase.
- MQL/SQL to Close Ratio: You can then track closed deals, to MQLs and SQLs to see if marketing's leads are converting into pipeline opportunities.
- # Of "Open" MQLs/SQLs: You should have a process in which sales reviews these "open" leads and following actions for the leads in the database once they become an MQL or SQL.

Step 5: Turn Strategy into Action – the 12-Month Activity Plan



Document Your Marketing Plan

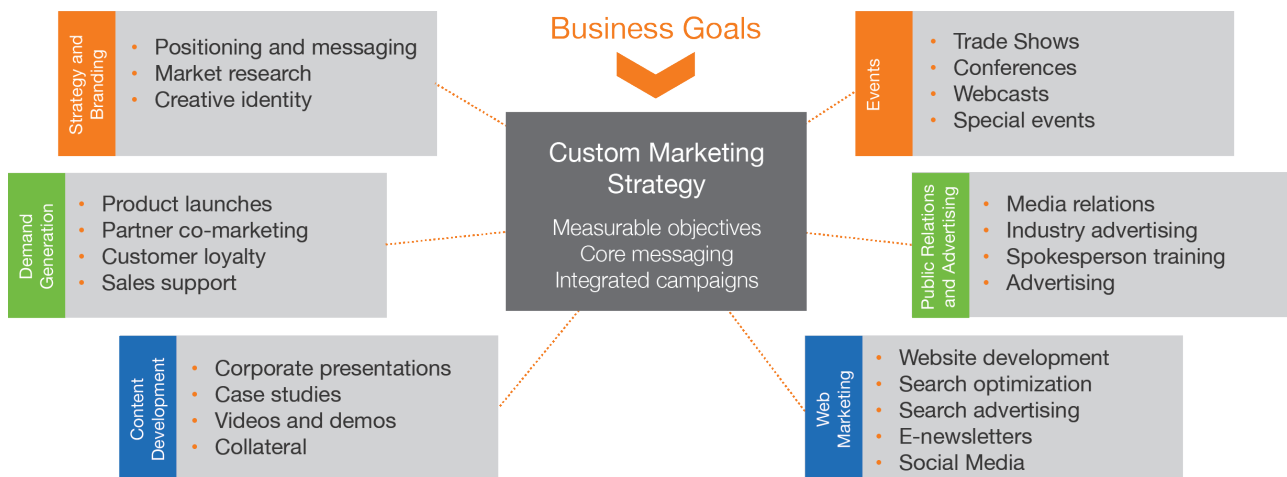
According to a report by Marketo in 2014, 56% of small businesses did not have a documented marketing plan.

Documenting your marketing plan assists in proving ROI, but also allows you to prioritize clear goals and therefore achieving more of your objectives and projects. Being organized with your plan will only help your organization stay on track and see the clear path ahead.

Read the Marketo report at: <http://www.marketo.com/reports/marketing-trend-watch-2014-planning-edition/>

Now it's time to think in general terms about how your company will achieve its objectives. Is it through targeting a certain part of a new market segment, or through challenging the existing market with new products? Do you capture market share with a loss-leader product? Weigh the pros and cons of what each strategy can provide to your company.

A marketing campaign is an integrated set of activities coordinated closely to achieve a common goal. Campaigns are often centered on an industry, audience type, partnership or major product/service initiative. Campaigns also include differentiators and core messages targeted to your personas to communicate your brand position consistently across content channels.



At this stage, you'll map out campaign plans in a budget-based, 12-month activity plan. This plan outlines specific activities by quarter and is intended to be a living document.

Often, activity plans are modified on a quarterly basis, based on new opportunities, changing business needs, and/or the outcome of activities. This is also the time to identify internal staff and external resources needed to carry out the activity plan and measure results, and define the responsibilities of each person.



Having the right people, tools and processes to carry out the planned activities to support the strategy and achieve the objective is critical.

- Rebecca Geier, CEO and Co-Founder, TREW Marketing

Marketing Planning Checklist

Now that you have a good insight into preparing for your marketing plan, use this checklist to help you define each step.

- ☐ Define your business goals for the next 1, 3 and 5 years
 - ☐ Define the measurable, meaningful goals and objectives for each
 - ☐ Define how marketing can contribute to achieving these goals and the role of the sales team
 - ☐ Determine what sets your products or services apart from your competitors
- ☐ Define 3 personas as your target audience and market
 - ☐ Align those personas to each of your business goals
 - ☐ Determine how your personas view your market, industry and company
 - ☐ Determine the best way and place to attract those specific personas
- ☐ Define your marketing campaigns and their corresponding marketing activities
 - ☐ Define meaningful KPIs to measure your campaigns and activities against your business goals
 - ☐ Prioritize and define your inbound and outbound marketing activities:
 - ☐ Website
 - ☐ Blog
 - ☐ Content
 - ☐ SEM/SEO
 - ☐ PR/advertising
 - ☐ Events
 - ☐ Social media
 - ☐ Email marketing and marketing automation
 - ☐ CRM

Conclusion

Strategy is an evolution, and something that takes a great deal of time develop. However, taking the time to map out a clear, strategic direction will ensure a cohesive marketing plan that maps to your personas through campaigns and is time bound and budget driven.

Other Resources:



Smart Marketing for Engineers: Build Your Foundation

This ebook provides a guided approach to building your marketing foundation, from company positioning to marketing planning.

- Position and Plan - Start Here for Best Results
- Your Website - Where Engineers Go First
- Content Is King
- Search Marketing - Get Googlized
- Direct Marketing - Convert Your Leads to Sales

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Smart Marketing for Engineers: Lead Generation

This ebook provides a detailed, step-by-step approach for how you can make marketing work for your company.

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Smart Marketing for Engineers: Website Redesign

This ebook guides you through TREW's proven website redesign process with clear steps on creating a website.

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