

Integrated Marketing Plan Template

Introduction and/or executive summary

Always make sure the reader or audience member understands what is being presented and why

A written intro is a short paragraph or two preview of what is to be shared in the paper

An oral intro is a 30 second to a minute preview of what is to be shared in the presentation

An exec summary is a page or two written synopsis that covers the entirety of the paper in a digest format

Research

Situation analysis of the company

- Company history

- Basic info on the brand

- Basic info on the product(s) or service(s)

- Review the business plan, consideration of the larger business picture

- Implications of the financial shape of the company and/or product line

- Examine issues with manufacturing, storing, shipping, distribution partners

- Which audience have we targeted, and with what success?

- Review previous marketing campaigns, insights gleaned from those campaigns

- Other internal secondary research

- External secondary research about our brand and/or product

- Corporate benchmarks established based on past campaigns and executive goals

Situation analysis of the competition and marketing environment variables

- Past, present and predicted sales volume and market share

- Defining the competitive landscape: what is your industry?

- Review direct and indirect competitors

- How does the economic forecast impact your industry and business?

- Are there political or regulatory changes that impact your brand?

- What technological concerns affect product development, innovation, distribution or promotion?

- How does this change from a local, regional, national, and global perspective?

Situation analysis of the consumer

- What do consumers think of your industry, your product, competing products?

- In what ways is there differentiation between you and the competitors? How much are consumers aware of the differences?

- How is your product positioned to consumers?

- What are customers' and prospects' current needs and wants that are related to your business?

- What are documented or perceived customers' and prospects' feelings about your product?

- How do consumers talk about your product?

- How can studying consumer behavior open up ideas to explore in our campaign?

Translating research into action

- Every step of the way the research should be pointing to a challenge faced by the client

- Complete a SWOT analysis to distill those challenges and opportunities

- Articulate the possible movement from barriers to success, internal to external and vice versa

- Conclude the research by sharing key insights; not just what you learned, but why that matters

- Declare the high-level challenge faced by the client, which will serve as the kernel of your campaign strategy

Objectives

Review existing corporate objectives, which is broader than just marketing

- Are there broad financial goals?

- Are there attempts at changing the brand's position?

- Does the company need to undergo a cultural change of any sort?

- Are things happening in the world that have necessitated company-wide goals?

Consider operational objectives related to marketing that should occur before or concurrent with this campaign

- These are not about marketing communications

- Are there any changes to the product or service? Are you dealing with product extensions?

- Is there a need for pricing to go up or down, either for a short burst or the long haul?

- Are you trying new things in regards to distribution?

- Could any of these operational elements impact what you will be doing with your promotional campaign?

Begin to craft your own objectives

- While considering the bigger picture, these objectives are aligned with this promotional marketing campaign

- Marketing communications focus on two types of objectives: sales and promotional

Sales objectives are short-term efforts trying to drive immediate revenue

- Since the goal is clear, they have an end date and a specific number or conversion that it is trying to achieve

- Sales goals are focused on one of four revenue measurements

 - Units

 - Dollars

 - Market share

 - Conversions that have a clear financial value

Promotional objectives on the other hand are long-term goals

- They build brand equity so revenue is generated over many years

- They don't have a specific end date or metric for accountability; that is assigned to the corresponding tactics at a later time

- There are two sub types of promotional marketing objectives: purchase funnel and brand attribute

Purchase funnel objectives are aligned with the purchase funnel / customer journey stages

- Consider when the research indicates your prospects are getting stuck at one point in the funnel

- You can start with the funnel stage, then add a conditional phrase after a comma to help further delineate your purchase funnel objective

- Example: "Drive awareness of Bellevue College, an open enrollment college with bachelor programs"

- The primary focus is to drive awareness, but the additional information helps the consumer better understand what is being offered

- Purchase funnel objectives are often used for direct campaigns

Brand attribute objectives are not aligned to one specific stage, but impact consumer perceptions about the brand

- Consider when the research indicates that consumers do not see the company in a particular light, or if a problem arises that erodes that brand characteristic

- Instead of a descriptive attribute, these objectives could also highlight a fact. But make sure that this truth matters to consumers at all stages; most factual information aligns with a step in the purchase funnel

- Example: "Increase the perception that Exxon is sustainable"

- These touchy feely objectives still need to result in specific tactics that will be measured to show accountability

Remember: justification for these choices should be rooted in the research work conducted earlier

Strategy

What is the overall planned approach to achieving those stated goals?

Is this consistent with the client's ongoing brand positioning?

Operationally are there any changes we need to address to make this campaign work?

Does this new campaign have any long-term impact on the brand or company?

Will there be changes that need to be addressed with the larger team before we begin the campaign?

Craft a promotional marketing strategy statement

Limit to 1-2 sentences

Take the company-centric objectives and turn them into consumer-facing language; speak directly to the consumer as "you" in this statement

Make sure that the statement is primarily talking about the consumer and their needs, not about the client

Include a strong verb to describe what you want the consumer to do after seeing this campaign

An emphasis on storytelling makes it inspiring and sets the stage for creative messaging

However, it is not a slogan or creative tagline; it is a framework used internally to guide what comes next

How does that translate into a big idea?

How do the ideas in this statement come alive? Write a paragraph or two to explain how this campaign comes together to communicate a unified story that will engage the audience while accomplishing your objectives

What is the thread that connects all the following tactics together as one connected campaign?

What are some high level ideas that can guide the creation of specific tactics?

Determine initiatives and promotional channels

Which initiatives serve this client? These are sub disciplines of promotion such as advertising, content marketing, PR, sales, event marketing, retail efforts?

Which traditional promotional channels serve the respective initiatives? TV, print, OOH, radio?

Which digital promotional channels serve the respective initiatives? Search, display, online video, mobile?

What media platforms within each promotional channel would be appropriate for this idea and audience?

Does this project need a media plan?

Who will the target audience be for this specific campaign?

Does that differ from the targeted audience the brand normally pursues?

What segment details will mostly likely impact tactical choices that support the strategy?

Should we create a persona to help articulate who this is and how it impacts creative / media choices?

Creative messaging framework

What choices make the most sense for communicating the big idea?

What are some creative elements that might guide the creative team?

Does this project need a creative brief?

Tactics and Measurement

Each step of the way you must connect tactics back to the strategy and objectives; how does this help?

Emphasize the integrated nature of the campaign throughout the presentation

List tactics one by one, starting with the core, central tactics that largely influence other integrated efforts

The best papers and presentations will show some visualization of what that tactic might look like

Each tactic should be detailed; compelling information and a perspective are needed to win over clients

Each tactic must be justified; this ties back to the objectives and strategy

In most cases, it is best to list the planned measurement alongside each tactic

Don't just throw out a metric type, such as conversion rate: define the conversion, commit to a number

Just like a SMART sales objective, these should have timelines for completion

What benchmark data could you use to establish a specific numeric goal?

What would it cost to create this tactic (this could be actual cost, or the time or effort needed)?

Consider how the cost might or might not be reflected in the measurement

Failure to indicate how you will measure any one tactic is a warning sign that this particular idea is not ready