

Marketing Planning

The first stage in the marketing planning process is to conduct workshop which can draw out the areas where an organisation needs to focus resource and build a plan to position their brand and products/services in the relevant market.

A marketing strategy workshop usually takes 3 - 4 hours (depending on the size of the organisation and how many people attend).

A workshop would generally cover the following:

Top Level Objectives

- What business you are in – industry analysis & review, understanding of the market they operate in.
- Short, medium and long term objectives – objectives around sales revenue targets, brand and market positioning.
- Focus on 3 months, 12 months, 3 years

Current Status

- Understanding of the business structure – sales cycle, distribution, timelines.
- How the sales process is tracked from lead to closure (CRM).
- Key stakeholders – owners, suppliers, customers etc.
- External contractors or supplier relationships in place such as graphic designers, web developers, printers etc.
- Internal resources available.

Current Market Situation and Competitor Landscape

- Key competitors – who, where, what is their point of difference.
- How do you compete and how should you compete, what makes your business different etc.
- What is currently in place from a sales and marketing perspective.
- What is working, what is not working.
- Emerging trends

Strategies and Tactics

- Defining the value proposition.
- Target audience – creating characters and describing their demographics such as male/female, age, country of origin, occupation, income etc.
- Target audience behaviors and lifestyle choices – where do they go, what do they do.
- Brainstorming ideas to achieve business objectives – events, website, PR, online, social media, newsletters, advertising.
- Constraints, what would you do if you had to reduce resources.

Finance, Funding and Investment planning

- Financial model (P & L)
- Understanding of how revenue has grown and from where, where are most of the costs etc.

The information extracted from a workshop such as this allows a marketing specialist to write the marketing strategy for an organisation.