

1 Conduct a Situational Analysis

Two Approaches:

Light - What are we doing well, not so well? Where do we stand in the market?

Full - Use a framework: SWOT, Porters, 5Cs (note, check company Marketing Plan).

2 Define Business Objectives

Two Approaches:

Light - Define the problem to be solved + what success looks like (KPIs).

Full - Integrate the company mission, vision, and value (frame success in this light)

3 Document the Targets

Target Market & Audience:

Demographics, Psychographics, Ethnographics, etc.

Document the consumer plight and build personas for your ideal buyers.

4 Gather Research Confirm Assumptions

Test Assumptions, Confirm Intuition:

*** Build the insight(s) that power your strategy ***

Use future-forward thinking; Where is the market, audience, competition heading?

5 Build the Plan

Strategy: "Why" + "What" Tactical Plan: "Who" + "When" Tactics: "How" + "Where"

STRATEGY: 1) Story, 2) Theme, 3) Idea(s), 4) Comms/Msging, 5) Tone, 6) Voice

PLAN: 1) The Project Plan, 2) Budget, 2) Content Calendars and/or Media Schedules

TACTICS: 1) Selecting the Tactics, 2) Learning and Adjusting in Real-Time.

6 Execute the Plan

Implement w/ intent:

Intend to change - monitor and adjust the plan (optimize) based on learnings.

Adjust- Weekly or Monthly. Note: never go beyond a quarter without adjustment.

