

Winning Strategic Planning

Winning The Future



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**“Give me six hours to chop down a tree and I will
spend the first four sharpening the axe”**

Introduction

Whether you're starting fresh or refining an existing strategy, this document lays the groundwork for effective campaign building. **Before delving into planning, ensure your systems are configured to track activities and gauge KPIs accurately.**

For those already immersed in marketing activities, this guide elevates the intentionality of your efforts. **Before diving into planning, conduct a comprehensive audit of your current activities and their impact to establish a baseline for KPIs.**

When strategizing, prioritize topics or activities that have demonstrated effectiveness based on measurable KPIs, and then expand from there.

In both scenarios, remember: no one understands your brand better than you do.

Audience Segmentation

Customizing the approach to fit your unique business is essential. Both Pardot and HubSpot offer core "lead scoring/ranking" based on engagement minutes tailored to your preferences. These minutes accrue through various activities, such as website visits, email opens, ad clicks, content downloads, and more.

The segmentation covers key categories: No engagement, Engaged, Aware, Consideration, Decision. This segmentation method seamlessly applies to both new prospects and existing clients.

Leveraging these segments goes beyond ads and emails—suppression lists benefit as well. The primary goal is to deliver targeted content to specific individuals at the right moments. Comprehensive data reporting from your segments plays a crucial role in guiding content strategy.

Define Channels

Organic Social Media

- ☐ LinkedIn
- ☐ YouTube
- ☐ Facebook
- ☐ X / Twitter
- ☐ Instagram
- ☐ TikTok
- ☐ Other_____

Paid Social Media

- ☐ LinkedIn - Feed Advertising
- ☐ LinkedIn - Paid Messaging
- ☐ LinkedIn - Retargeting
- ☐ Facebook
- ☐ X / Twitter
- ☐ Instagram
- ☐ TikTok
- ☐ Other_____

Email Marketing

- ☐ 1:1 Email Marketing (Cadences + Sequences)
- ☐ 1:Many Email Marketing

Search Engine Marketing

- ☐ Google AdWords
- ☐ Bing
- ☐ Remarketing

Other

- ☐ Public Relations (Earned + Paid Media)
- ☐ Conferences
- ☐ Events

Define KPIs

Web

- ☐ Total traffic
- ☐ New vs Returning traffic
- ☐ Top 3 performing incoming channels
- ☐ Top 10 performing pages
- ☐ Other_____

Paid / Organic Social Media

- ☐ Cost per impression
- ☐ Cost per click
- ☐ Total impressions
- ☐ Total clicks
- ☐ Total likes/shares/comments
- ☐ Total followers
- ☐ Organic vs Paid follower ratio
- ☐ Click-through rate
- ☐ Engagement rate
- ☐ Conversion rate (to CTAs)

Search Engine Marketing

- ☐ Cost per impression
- ☐ Cost per click
- ☐ Click-through rate
- ☐ Conversion rate (to CTAs)
- ☐ Total impressions
- ☐ Total clicks

Earned & Paid Media

- ☐ Cost per impression
- ☐ Cost per click
- ☐ Total reach
- ☐ Total impressions
- ☐ Total clicks

Email / Cadence / Sequences

- ☐ Open rate
- ☐ Click-through rate
- ☐ Open-to-click ratio
- ☐ Number of Meetings
- ☐ Meetings-to-click ratio
- ☐ Number of spam complaints
- ☐ Spam-complaint rate

Define Goals (Example)

Goal	Tactic	KPIs
1. Generate leads and create brand awareness	Email Paid Social Media Organic Social Media SEM	
2. 2. ICP + Persona Refinement	Paid Social Media Email	
3. Messaging refinement	Email SEM Paid Social Media	
4. Keyword refinement	SEM	

Quarterly Planning Timeline (Example)

	Month 1				Month 2				Month 3			
	1	2	3	4	5	6	7	8	9	10	11	12
Content + Organic Social	Content 1				Content 2				Content 3			
	Webinar 1				Webinar 2							
Paid Social + SEM	Brand awareness / Request demo or more information SEM (On-going)											
	Brand awareness / Request demo or more information Paid Social (On-going)											
	Content Promotion / Conference Targeting / Testimonial Promotion											
Conferences + Events	Conference				Conference		Conference					
					Conference				Conference			
Media Relations									●			
Wild Card									●			

Sketch your ideal quarter

Blank Templates

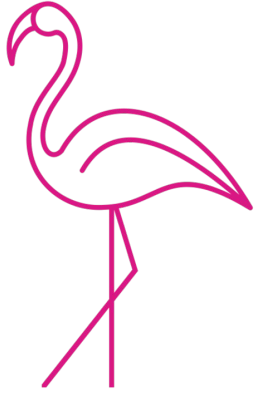
Goals (Template)

Goal	Tactic	KPIs

Quarterly Planning Timeline (Template)

	Month 1				Month 2				Month 3			
	1	2	3	4	5	6	7	8	9	10	11	12
Content	<div><div></div></div>											
Paid Social + SEM					<div><div></div></div>							
Conferences + Events					<div><div></div></div>							
Media Relations									<div><div></div></div>			
Wild Card									<div><div></div></div>			

Wow, Thats Fantastic!



WTF

Winning The Future. This spin on the acronym aligns with the dynamic and ever-evolving nature of marketing strategies. To succeed in the competitive landscape, businesses need to continuously adapt, innovate, and embrace emerging trends.

WTF becomes a mantra for staying ahead, captivating audiences, and ultimately, winning the future market share.

It's a reminder that in the world of marketing, success often comes from boldly navigating the unexpected and creating campaigns that make people say, "Wow, that's fantastic!"

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