



Digital marketing strategy

Planning Template

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Plan > Reach > Act > Convert > Engage



Introduction

Digital Marketing Planning Template

First things, first...

Digital marketing planning is no different to any other marketing plan, in fact it's increasingly strange to have separate plans for 'digital' and 'offline' since that's not how your customers perceive your business. However, we're often required to separate plans for "digital" only based on the way teams and reporting is structured and to help the transition to digital - before it becomes "business as usual". A common format helps align your plan to other marketing plans!

Some general advice to keep in mind when planning

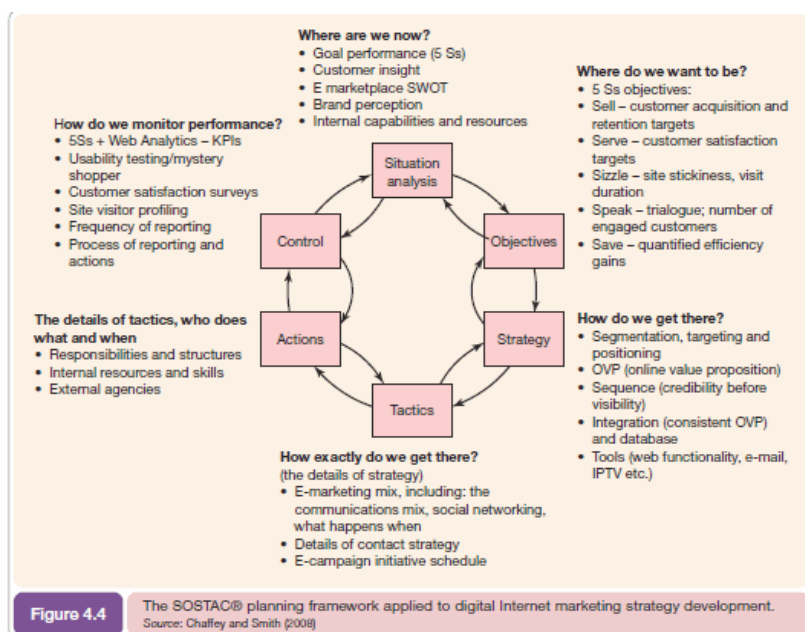
- ✓ **Start with the customer.** Build your plan around customer insights and needs - not around your products and tactics.
- ✓ **Keep it flexible.** Situations and plans change, especially online, so ensure plans are usable by a clear vision for the year and keeping detail to a shorter term 90-day focus
- ✓ **Set realistic goals.** Include specific objectives in your plans but keep them realistic by fact-based and state assumptions, so they're easy for others to buy into.
- ✓ **Keep it Simple!** "Jargon light" is best. Again it helps others buy into what you're saying
- ✓ **Keep plans up to date.** Review and update monthly or quarterly.
- ✓ **There isn't a perfect plan.** What's needed changes according to each business!

Creating a structure

Knowing where to start is often the hardest thing when writing a digital marketing plan. So once you have a structure / framework to follow in a table of contents it's then almost a matter of filling in the gaps...

At Smart Insights we recommend the [SOSTAC™](#) planning structure developed by PR Smith, Dave Chaffey's co-author of Emarketing Excellence.

SOSTAC™ is a great framework for business, marketing or digital marketing plans since it's



simple and logical, so it's easy to remember and to explain to colleagues or agencies.

Each of the six areas help in separating out the key strategies, for example customer acquisition, conversion and retention.

That's the intro, you'll want to delete this bit! In the other sections we have provided headings to help structure your strategy, with prompts to help your thinking in italics which you'll also want to delete.

About this document

We've created this since we've been asked so many times for it when giving training courses and consulting.

It's created by Dave Chaffey and Dan Bosomworth of [Smart Insights](#).

If you want to download a Microsoft Word version of this document to amend for your own use or check back for updates, you can [download this Word document](#) from our site.

We will keep improving this template, so please feedback with your thoughts and suggestions for improvement: info@smartinsights.com.

Where do I find more information on digital marketing concepts

If you're not familiar with some of the concepts we introduce in this template, naturally, there's more info online. We also have these shortcuts to more in-depth strategy guidance which we reference :

- ✓ <http://bit.ly/smartstrategy> - 10 ways to convince colleagues you need an online strategy
- ✓ <http://bit.ly/smartintegration> - a table to integrate your goals and strategies
- ✓ <http://bit.ly/smartfeedback> - customer feedback tools
- ✓ <http://bit.ly/smartbenchmarking> - recommendations on how to benchmark against competitors
- ✓ <http://bit.ly/smartrace> - RACE is our framework for defining strategies to support the customers through the lifecycle
- ✓ <http://bit.ly/smartradar> - our digital marketing radar helps you prioritise your online presence to reach and engage your audience
- ✓ <http://bit.ly/smartreputation> - monitor your online reputation
- ✓ <http://bit.ly/smarttargeting> - online targeting options
- ✓ <http://bit.ly/smartsegments> - how to segment your audience in Google Analytics

You may also find Dave Chaffey's book *Internet Marketing: Strategy, Implementation and Practice* useful since it goes into much more depth in all these areas.

Situation analysis.

Where are we now?

Understanding your online marketplace

The immediate, or micro-environment

A. Our customers

Always start with the customer, their characteristics, behaviours, needs and wants. You should define:

- ✓ Options for segmenting and targeting – you should apply your traditional segments, but also consider the new microtargeting options available online – see <http://bit.ly/smarttargeting>.
- ✓ Ideal customers - characteristics summarised in named personas are useful to get started, think about demographics, searching and product selection behaviours and unmet needs - detail here is very useful to talk about “What would John do.. or think about...”. Also consider what your data tells you in regard to your most profitable, and potentially profitable customers

B. Our market

- ✓ Market description - Focus on actionable needs and trends - are you meeting them, what are they - this insight is useful for other teams and you should find out what other teams know, what exactly is growing in the market, is there evidence you can draw from

C. Our competitors

- ✓ Benchmark against competitors for your customer personas and scenarios against the criteria given in the strategy section, in particular their marketing mix.
- ✓ For key digital tactics like SEO and social media marketing, it's also important to benchmark against competitors. See our guide at <http://bit.ly/smartbenchmarking>.

D. Intermediaries, influencers and potential partners

- ✓ Review customer use of different types of sites which may influence their decision for example, search engines, specialist news sites, aggregators, social networks and bloggers

You can monitor your reputation across different influencers using <http://bit.ly/smartreputation>

E. Wider macro environment

These are the big picture strategic influences. We recommend you don't go into too much depth on these, instead review the influence of the main macro factors for digital; social, legal and technology in the context of customer analysis and competitor benchmarking.

- ✓ *Social - how have consumer attitudes changed?*
- ✓ *Legal - checking your online marketing activities comply with privacy and online trading laws before problems arise*
- ✓ *Environment - is your approach ethical and sustainable*
- ✓ *Political - can you take advantage of government funding schemes*
- ✓ *Technology - review of the latest technology*

F. Our own capabilities

Once you have looked outwards (often missed), only then should you turn inwards and look at your own capabilities.

In particular, you may find this [digital marketing benchmarking spreadsheet](#) useful for benchmarking your current capabilities. The spreadsheet supports Dave Chaffey's report on Managing Digital Channels for Econsultancy which goes into more detail on different areas of strategy development and channel governance.

G. Internet-specific SWOT summary

Include a digital channel SWOT that summarises your online marketplace analysis findings AND links to strategy. In a large organisation, or for a more complete summary complete a SWOT for:

- ☒ Customer acquisition and conversion and customer development
- ☒ Different brands
- ☒ Different markets
- ☒ Different competitors – direct and indirect
- ☒ We recommend using a TOWS matrix for SWOT: <http://bit.ly/smartswot> since this helps integrate your analysis with your strategy rather than the analysis being placed on the shelf and forgotten.

Tips

- 1) *Garner evidence and data to help others understand your recommendations - visualise with charts and graphs where you can – they're much more effective than a long report*
- 2) *Set-up your digital listening post to ensure you understand what's going on around you and listen in on conversation that could inform your understanding*
- 3) *Google "market research" for documents relevant to your sector, they're often a cheap source of insight to change perspective*

Objective setting

Where do we want to be?

Setting useful, actionable objectives

We recommend four different types of measures to help you and colleagues look forward to the future offered by digital marketing:

So we suggest this hierarchy of measures may help in larger organisations:

- ✓ 1. Top-level broad goals to show how the business can benefit from digital channels
- ✓ 2. Mid-long term vision to help communicate the transformation needed in a larger organisation
- ✓ 3. Specific SMART objectives to give clear direction and commercial targets
- ✓ 4. Key performance indicators to check you are on track

You should be as specific as possible in your goals. We recommend these should be:

- ✓ SMART - see the definition at foot of <http://www.smartinsights.com/about/>
- ✓ Based around the customer lifecycle – we use the mnemonic RACE to define this and give examples of different KPIs here: <http://bit.ly/smartrace>
- ✓ Define what the R is in ROI for you - it will likely be monetary but don't forget digital marketing can be more than that
- ✓ Divided into key digital strategy areas of customer acquisition, conversion, customer development and growth - this is important to ensure you're covering all of the areas
- ✓ Broken down into short, medium and long-term goals

Align goals to the business and marketing goals and how you substantiate them using the approach described in <http://bit.ly/smartintegration>.

Tips

1. *Make sure your online goals align with organisational goals - your colleagues will believe more in your strategy then.*
 2. *Once you have completed the KPIs, go back up to the big picture and define a long-term vision for how digital will help the organisation grow into the future, again aligned with organisational vision.*
 3. *When creating the strategy make sure it is aligned with these goals, a table linking goals, substantiation (situation analysis) and strategies as given in Dave's books can help here.*
 4. *Finally, remember to revisit this section to align with your control and review process. Simplify to the "strategic levers" which really control business results. These are your K KPIs.*
- In a nutshell, it's about alignment and integration between the different sections of your plan.*

Strategy

How are you going to achieve the goals?

Setting a meaningful strategy

The key elements of digital strategy involve revisiting and aligning the main thrust of your marketing strategy in an online context, make sure you draw from other plans, if there isn't one then use these headers. Don't get drawn into the details at this stage. That's the tactics.

We recommend you summarise your strategy in a table like the one shown here: <http://bit.ly/smartintegration> - this provides a great summary and integrates goals with situation, strategy, tactics and measures!

But you may want to summarise the essence of some or all of the digital strategies below. How are you going to leverage the potential of digital marketing to your business, and how does that meet the objectives? This is about your approach only, not the detail.

Consider breaking it down as well, it's often easier to explain in smaller, bite-size chunks, this also helps when it comes to tactics which should hang from the strategies below:

A. Targeting and segmentation

- ✓ A company's online customers have different demographic characteristics, needs and behaviours to its offline customers. It follows that different approaches to segmentation may be required and specific segments may need to be selectively targeted though specific content and messaging on your site or elsewhere on the web. This capability for "micro-targeting" is one of the biggest benefits of digital marketing.
- ✓ Specific targeting approaches to apply online include: demographic, value-based, life-cycle and behavioural personalisation.

B. Positioning

- ✓ How do you position your online products and services in the customers mind? Consider
- ✓ Reinforcing your core proposition. How do you prove your credibility.
- ✓ Define your online value proposition. This should flow from your positioning and be what the customer sees immediately when they interact with you online.
- ✓ Define these in key messages for different audiences, e.g. prospects against existing customers, segments with different value.
- ✓ You need clear messaging hierarchies to effectively communicate your positioning both in online and offline media.

C. Proposition and the marketing mix

Think about the digital marketing mix - how can you provide differential value to customers through varying the 4Ps online through Product, Price, Promotion and Place and how can you add value through service. And don't forget what PR Smith calls the Eighth P of "Partnering". Particularly if you sell online, you will want to explain how you will modify the marketing mix.

For example:

- ✓ **Product.** Can you offer a different product range online? How can you add value to products through additional content or online services?
- ✓ **Price.** Review your pricing and consider differential pricing for online products or ser-

vices.

- ✓ **Place.** Identify your online distribution issues and challenges. Should you create new intermediaries or portals or partner with existing sites?
- ✓ **Promotion.** Discuss the problems and opportunities of the online communications mix. These will be detailed in the acquisition and retention communications strategies. Review approaches for online promotions and merchandising to increase sales. You may want to include exclusive promotions to support the growth of different digital channels, i.e. email, mobile, Facebook, Twitter.
- ✓ **People.** Can you use automated tools such as FAQ to deliver “web self-service” or should you provide online contact points through Live Chat or Phone Call-back?
- ✓ **Processes.** List the components of process and understand the need to integrate them into a system.
- ✓ **Physical evidence.** Identify the digital components that give ‘evidence’ to customers of your credibility such as awards and testimonials
- ✓ **Partners.** The eighth P. So much of marketing today is based on strategic partnerships partnerships, marketing marriages and alliances that we have added this ‘P’ in as a vital ingredient in today’s marketing mix.

D. Brand strategy

Gaining ‘street cred’ online is now paramount to success, how and where are you going to do that - brand favourability follows credibility and trust - what do you understand will be the reasons to engage with your brand, why would they click through - or not - how will you demonstrate credibility online?

E. Online representation or presence

This includes your own Web site strategy (one site or four, sub-domains, what are the site goals and how will they be achieved...) and priorities for social presences. Our digital marketing radar (<http://bit.ly/smartradar>) helps you prioritise your online presence to reach and engage your audience.

F. Content and engagement strategy.

Which content will feature to gain initial interest, support the buying process (text and rich media product content and tools) and stickiness and to promote return visits (blogs and community). Remember user-generated content too, such as reviews, ratings and comments. You will have to prioritise content types and ensure you devote sufficient resource to it to create quality content which helps you compete. All effective online companies see themselves as publishers!

G. Digital channel acquisition communications strategy

Outline how you will acquire traffic, what are the main approaches you will use? Don’t forget to consider how you drive visitors through offline media and integrated campaigns.

- ✓ Key digital media channels for traffic acquisition would include:
- ✓ Search engine marketing (natural and paid)
- ✓ Social media marketing and Online PR (think brand strategy)
- ✓ Partner and affiliate marketing
- ✓ Display advertising
- ✓ Email marketing to leads database

H. Digital channel conversion strategy

How does the user experience, which depends on information architecture, page template design, merchandising, messaging and performance help you make it easy for visitors to engage and convert?

I. Digital channel retention communications strategy

Often neglected, what will be the main online and offline tactics to encourage repeat visits and sales. Again integrated campaigns involving offline touchpoints are crucial here.

J. Data strategy

What are your goals in permission marketing and data capture - what/where/how/when/why, what tools and value adds are you going to use? You might alternatively reference these in the conversion strategy.

How do you improve the quality of your customer data across channels to help increase the relevance of your messages through personalisation?

K. Multichannel integration strategy

How you integrate traditional and digital channels should run through every section of your strategy since it's key to success. One way to structure this is to map customer journeys across channels as channel chains.

L. Social media marketing strategy

- ✓ We would argue that social media marketing is part of a broader customer engagement strategy plus brand, acquisition, conversion and retention strategies, but many organisations are grappling with how they get value from this, so it may help to develop an overall social media marketing strategy.

M. Digital marketing governance strategy

- ✓ In larger organisations how you manage digital marketing is a big challenge. Questions that the governance strategy seeks to answer are how do we manage internal and external resources through changes to structures and skills needed for digital and multichannel marketing.

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Tactics

The details of strategy

Tactics are where the rubber hits the road to get results, so you need to define how you will implement your strategy in the real world - when you'll do it, with what, your goals for each tactic aligned to the main objectives and how that will be measured.

- ✓ Each of strategy sections A to M will need implementation details which you can get specialists in your team or agencies to develop. Remember that with digital, “the devil is in the detail”. The best digital strategies can fail if the execution is poor - search, social and email marketing and creating a persuasive web design are classic examples of this we see daily.
- ✓ If there's only you, create a plan and Just Do It! You have the benefit that you can be more nimble, so can test and learn
- ✓ How are you going to divide the year up - thinking about campaigns versus seasonal or business focusses, this helps to get the plan actionable. Consider quarterly (90 day) blocks to focus on and ensure objectives, strategies and tactics are focussed on that.
- ✓ Keep this section light and fact based and avoid too much description repeated in the strategy section. Hang your tactics under the strategic hangers, for example traffic acquisition, so that it's easy for others follow.

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Actions and Controls

Making it happen

Create measurable KPI's to align against objectives and stay on track

Issues to reference include:

- ✓ Budgets - media, digital platform investments and resources
- ✓ Timescales including a longer-term roadmap if necessary
- ✓ Organize your measuring in dashboards so that it's easy to summarise and keep up to date against the plan.
- ✓ Consider KPI's (key performance indicators) that relate to tactics, strategies and so objectives, sometimes a KPI is an objective, for example a KPI could be weekly total natural search traffic, home page bounce or email open rate. These can be good early warnings to objectives like 'online sales revenue' or 'new leads' not being met. Plain old Excel will suffice and will allow you to keep the latest results to hand.
- ✓ The key is that (assuming your objectives were clear, detailed and relevant) you have the headers to site your KPI's and measure against.
- ✓ Consider how you will measure and report using web analytics
- ✓ Are there other measurement tools and resources needed
- ✓ What is the process to measure and report, for example looking at keyword level traffic daily is not actionable, but home page bounce can be if site changes are made
- ✓ Think about creating a KPI summary dashboard

Governance

In larger organisations, you have to think about resourcing, i.e.

- ✓ Skills - internal and agency requirements to deliver on your plan
- ✓ Structure - do you have a separate digital team or can you integrate
- ✓ Systems - the processes to make things work and keep you agile

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Executive summary

No, you're still not quite finished! After your plan is created, go back to the beginning and create a 1 page summary that a busy, senior executive can understand and believe in!

The same exec summary is useful for PowerPoint presentations should you need to present the bones of your plan, and the ROI. An important part of your role is helping others understand what digital marketing is, and the immense value that it can add to the business.

Naturally the Exec summary should contain a 2 line summary of the different parts of SOSTAC™ (challenging!) but stressing the need for investment in digital channels and showing the key issues.

1 Situation

- ✓ Key issues requiring action

2 Objectives

- ✓ Our vision
- ✓ Key goals

3 Strategy

- ✓ Segmentation, targeting and positioning
- ✓ Brand development and customer engagement
- ✓ Customer acquisition
- ✓ Customer retention and growth

4 Tactics, Actions and Control

- ✓ Investment and budget
- ✓ Resourcing
- ✓ Timescales
- ✓ Success factors for managing change
- ✓ Measurement and testing

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