*Template for Strategic Marketing Communications Plan*

**Title (e.g. Brand name): Subtitle (e.g. Strategic Marketing Communications Plan)**

**Student Name**

**Course Code: Course Name**

**Course Instructor**

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# Executive Summary

This one page should include 4-5 paragraphs covering key findings from the main sections of this report, i.e.:

1. Overview of current situation
2. Market research
3. Marketing communications strategy
4. Budget
5. Conclusion

# Overview of Current Situation

This section presents an introduction (including business goals and objectives, and the scope of this report), a background of the business, and a marketing communications audit (within scope) of the 4Ps, the brand, and relevant PR.

## Introduction

Answer the following questions in this section:

1. Where does the **business** **want to be** (i.e. what is the **business** **goal** and what are the **business objectives**)?
2. What is the **business’s biggest challenge** in getting there (i.e. problem statement and the **scope** of this report)?

## Background

Answer the following questions in this section:

1. Where is the business **currently** (i.e. vision, mission, internal/external audience expectation)?
2. How did the business **get here**? (i.e. origin/founder story/market successes/lessons learned)?

## Marketing communications audit

Answer the following questions in this section:

1. What seems to be working/not in their current product, price, place, and promotion (4Ps) (i.e. **4Ps audit from a communications perspective**. E.g.:
2. Product: Which current product(s) has (/have) the best reviews/highest sales/highest margins?
3. Price: Which current price point(s) in their in their product portfolio seems (/seem) to be the most popular among current customers?
4. Place: Which current distribution channel(s) seems (/seem) to be the most popular among current customers?
5. Promotion: Which current campaign(s) seems (/seem) to have the highest return (monetary such as sales/non-monetary such as engagement)?
6. What seems to be working/not in their current branding (**brand audit**)?
7. What seems to be working/not in their current PR (**PR audit**)?

# Market Research

## Market Analysis

Include the following:

1. **PESTEL** (also called market analysis/ situational analysis/ external influences) with implications developed

|  |  |  |
| --- | --- | --- |
| **Factor** | **Changes/trends** | **Business Impact** |
| Political |  |  |
| Economical |  |  |
| Social |  |  |
| Technological |  |  |
| Environmental |  |  |
| Legal |  |  |

1. **SWOT** informed by PESTEL implications

Note: Strengths and weaknesses are internal to the company, but opportunities and threats are external. You have already researched external influences in PESTEL. Categorize PESTEL research findings as opportunities or threats based on their implications.

|  |  |
| --- | --- |
| Strengths | Weakness |
|  |  |
| Opportunities | Threats |
| (based on PESTEL) | (based on PESTEL) |

## Competitor Analysis

Include the following:

1. **Direct and indirect competitors** identified; prioritization based on share of wallet
2. **Position map** created based on points of differences and parity between prioritized competitors

|  |  |
| --- | --- |
| Points of Parity – Given Brand X and Key Competitor(s) | |
| (e.g. Price point) | (e.g. Brand X and Y offer product A at a similar price point) |
|  |  |
|  |  |

|  |  |  |
| --- | --- | --- |
| Points of Difference – Brand X and Key Competitor(s) | | |
| Factors | Brand X | Competitor(s) |
| (e.g. Warranty) | (e.g. standard warranty) | (e.g. generous warranty beyond industry standard) |
|  |  |  |
|  |  |  |

1. **Key competitive advantage/USP** of the brand identified and stated

Positioning is often how brands differentiate. Based on the position map above, include the positioning statement in the following format:

To **[target audience],** [Brand X] is the **[product category]** that provides **[key benefit/differential/problem to be solved]** because **[promise].**

## Target Market Analysis

Include the following:

1. **Market segmented** using Vividata/StatsCan
2. Target segment(s) **identified and prioritized** (primary, secondary, tertiary)

Note: Research skills based on prior courses must be applied to develop segments. In-text citation mandatory.

|  |  |
| --- | --- |
| Primary Target Market | |
| Demographic |  |
| Geographic |  |
| Psychographic |  |
| Behavioural |  |
| Secondary Target Market | |
| Demographic |  |
| Geographic |  |
| Psychographic |  |
| Behavioural |  |

|  |  |
| --- | --- |
| Tertiary Target Market | |
| Demographic |  |
| Geographic |  |
| Psychographic |  |
| Behavioural |  |

1. **Persona/profile developed**

Note: Attach persona as an Appendix. ([See Appendix A](#_Appendix_A))

## Partnerships

Include the following:

1. Vendor vs. supplier vs. partner **defined and identified**
2. Relevant **contracts reviewed**
3. **Data** from Salesforce/other vendor management software **assessed**

# Marketing Communications Strategy

## Goals and objectives

**Business Goal:** (e.g. Increase no. of revenue streams for the business)

**Business Objective:** (e.g. Launch a new service based on customer needs in KW in FY\_\_\_ in $\_\_\_\_ budget)

**Marketing Objective:**

1. Identify relevant marketing funnel stage(s). Marketing funnel stages correspond to the product lifecycle stage.

|  |  |
| --- | --- |
| **Product lifecycle stages** | **Marketing Objective (marketing funnel stages)** |
| Introduction | Awareness, Interest |
| Growth | Awareness, Interest, Consideration, Engagement, Purchase |
| Maturity | Purchase, Loyalty |
| Decline | Purchase, Loyalty, Awareness (about the next new thing!) |

1. Within the selected marketing funnel stage(s), identify the gap in customer experience. (E.g. In the awareness and interest stages, is the branding or messaging inconsistent (i.e. lack of integrated marketing communications?)
2. Now combine the findings from first and second and **develop the marketing objective** so it qualifies as SMART (e.g. Develop USP-focused awareness campaign in the KW region for Brand X’s product A using integrated media from (start period) to (end period) in the allotted budget of $\_\_\_).

## Marketing communications strategy

Based on the key findings of [current situation,](#_Overview_of_Current) [market research](#_Market_Research) and [marketing objectives](#_Goals_and_objectives) developed in the previous sections, include an overview of distribution of resources (time, money, and human) between **own** (e.g. your company website is owned by your organisation - you have complete control over the content and messaging that is displayed)**, paid** (e.g. all advertising channels. You create the content - but must pay to get your messages to your audience) **and earned media** (e.g. media exposure generated through building reputation and relationships. You create the message content but rely on the strength of your reputation and relationships to get the message across. Earned media is primarily Public Relations-driven and would include tactics such as a press release, promotional events focused on influencers as the main audience. For more on how to include Public Relations as part of marketing communications strategy, [see Appendix B](#_Appendix_B).)

Briefly explain your own, paid, and earned media split with a rationale based on previous sections.

(As an example, marcomms strategy in this section may read like this, “A split of 50-30-20 is recommended between own, paid, and earned media. This is because, first, the current situation reveals untapped potential in the brand’s origin story as a key differentiator on one hand, and very limited resources on the other. Secondly, market research reveals target segments’ strong preference for authenticity. Finally, the marketing objective is to generate interest and engagement in the main brand. Spending 70% resources on own and earned will allow the brand to build an organic connection with the target segments differentiating on its strong story that is likely to yield sustained results over the long-term.”)

## Tactics

Based on key findings of [current situation,](#_Overview_of_Current) [market research](#_Market_Research), [marketing objectives](#_Goals_and_objectives), and proposed [marcomms strategy](#_Marketing_communications_strategy) developed in the previous sections, develop and recommend a rationale and a selection of tactics across own, paid, and earned media. Tactics comprise two main parts – an overarching creative idea (the big idea and brand voice) and a media mix.

## Big Idea

Note: Explain your Big idea/concept for the advertising campaign here. This should be something capable of sustaining a 12-month campaign, therefore the overarching concept needs to be wide enough to hold smaller campaigns that somehow relate to the original concept. Include a tagline that you think would work for this campaign. (e.g. Position the brand as a thought leader in the industry.)

Explain the rationale for this idea based on previous sections.

## Brand Voice

|  |  |
| --- | --- |
| Character/Persona |  |
| Tone |  |
| Language |  |
| Purpose |  |

## Multimedia mix (Advertising and Public Relations)

Note: Each member will focus on a unique medium (e.g. four members, four media).

In this paragraph, give an overview of your media mix. It would be interesting to know which medium will be the focus and which one(s) will be supportive of the main medium. Any media examples (images or graphics) should be referenced to an appendix.

Be specific in your answers – example if you are using an influencer on a social media channel, explain who it is and why you think they would be a good fit. Include hashtags and specific information about your medium choices.

Include all details in Appendix C. ([See Appendix C](#_Appendix_C))

Explain the rationale for this idea based on previous sections.

# Budget

1. **Budget allocation and return**

Note: This is taught in Level 3. This information is included in the form of a table in the appendix and only key takeaways are included in this section of the report. [See Appendix D](#_Appendix_D) as an example of this table. (In levels 1 and 2, you will fill the table briefly without getting into any calculations. In levels 3 and 4, you will be expected to demonstrate any projected sales-related calculations.)

In this paragraph, provide the key takeaways from your budget allocation (which medium/media gets/get the maximum budget, which one(s) the least and why) and the return on investment (ROI) on each (e.g. increased awareness/ interest/ engagement/ action/ loyalty). The ROI must be clearly connected to the stated marketing objectives.

An example of what this paragraph may read like is this, “70% of the $10k budget is allocated to own and earned media as per the marcomms strategy recommended above. The “Thought Leader” campaign running through this own-earned media mix is expected to generate engagement, consideration, and sales. Details including specific media channels, ROI, and KPIs are provided in [Appendix D](#_Appendix_D_1).

1. **Blocking chart**

Note: The blocking chart is an excel sheet that will be provided to you. It should be attached as an appendix. [See Appendix E](#_Appendix_E) as an example of this.

In this paragraph, briefly mention key insights such as why certain tactics will be implemented first, or why a few might be implemented together, etc.

An example of what this paragraph may read like is this, “Own and earned media investment in the summer is projected to yield greater engagement and will be measured with no. subscribers. The investment in fall-winter is projected to achieve holiday season sales and will be measured with growth in sales. ([See Appendix E](#_Appendix_E))

1. **Risk assessment and contingency**

Note: This is taught in Level 3. This information is included in the form of a table in the appendix and only key takeaways are included in this section of the report. [See Appendix F](#_Appendix_F_) as an example of this table. (In levels 1 and 2, you will fill the table briefly without getting into any calculations. In levels 3 and 4, you will be expected to include more details such as the risk analysis matrix.)

In this paragraph, briefly mention key insights (e.g. Risk associated with the key tactics seems unlikely to occur and has low extent of damage to the overall campaign. It is, therefore, recommended to accept this risk. The activity with the most likely to occur and most-damaging risk is \_\_\_\_. The recommended contingency is to transfer this risk to third-party and an amount of $\_\_ is recommended to be reserved to implement it, when and if needed. ([See Appendix F](#_Appendix_F_))

# Conclusion

Note: Summarize your key findings, recommendations, and expected return on benefits (monetary benefits – such as sales, market share, etc. and non-monetary benefits – such as goodwill, greater traffic, greater engagement, etc.). Bring to the reader’s attention the strengths (e.g. detailed market analysis, creative ideas, etc.) and weaknesses (e.g. assumptions, old/missing data, uncertainty in future prediction, etc.). Highlight any next steps for the reader (e.g. further suggested research, pilot testing of any ideas, etc.)

# Appendix A

**Target Segment Persona**

(Add a name and a picture. Use Some of the suggested elements to compose a professional persona are suggested below.)

|  |  |
| --- | --- |
| Who Stage | Background: job, career, family  Demographics: age, gender, income, location  Identifiers: demeanor, communication preferences |
| What Stage | Goals: primary and secondary goals  Challenges: what are the main pain points faced by this persona?  What can SmartSweets do?help the persona overcome challenges and achieve goals? |
| Why Stage | Real quotes about goals and challenges  Common objections: why wouldn’t the persona buy the product? |

# Appendix B

**How to include Public Relations as part of Earned Media in SMC strategy**

Your PR plan will include the identification and description of key publics in the following categories:

1. Customers:
2. Producers:
3. Limiters:
4. Enablers:

Remember that messaging is created to connect with specific audiences. In Marketing they are called Targets, in Public Relations they are called Publics.

Where communications messaging is concerned, ensure the message is consistent between your owned, paid media, and earned media (Public Relations). The message should not contradict itself across these media.

Remember your overall marketing objective would often need Public Relations to be achieved. Therefore, Public Relations (part of earned Media) is used as an effective tool, just like Advertising (part of paid media), to achieve the objective. Having an effective Public Relations strategy as part of your Strategic Marketing Communications Plan will help achieve your overall objectives.

Refer to the Public Relations Plan template used in PRNL8101 Public Relations for clarification.

# Appendix C

**Multimedia Mix (Advertising and Public Relations)**

## Medium #1 Group Member:

|  |  |
| --- | --- |
| Medium #1: (Insert Type) and change colour to match the Blocking Chart | |
| Tactic#1 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost (How much) |  |
|  |  |
| Tactic #2 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #3 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |

## Medium #2 Group Member:

|  |  |
| --- | --- |
| Medium #2: (Insert Type) and change colour to match the Blocking Chart | |
| Tactic #1 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #2 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #3 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |

## Medium #3 Group Member:

|  |  |
| --- | --- |
| Medium #3: (Insert Type) and change colour to match the Blocking Chart | |
| Tactic #1 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #2 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #3 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |

## Medium #4 Group Member:

|  |  |
| --- | --- |
| Medium #4: (Insert Type) and change colour to match the Blocking Chart | |
| Tactic #1 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #2 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |
|  |  |
| Tactic #3 (What) |  |
| Why |  |
| Placement |  |
| Timing – Frequency (When) |  |
| Target Market (Who) |  |
| Messaging – Tone (How) |  |
| Cost  (How much) |  |

# Appendix D

**Budget allocation and return**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S.No.** | **Tactics (examples below)** | **Est.Cost\*\*** | **Expected Campaign Attributable Return on Investment (ROI)** | **KPIs** |
| 1 | “Thought Leader” Campaign   * Own – website, email, YouTube series * Paid – IG ads * Earned – CBC, local business partnerships | * $5k * $1k * $2k | 1. Increase engagement 2. Increase consideration 3. Increase sales (\*projections below) | * 1. Traffic growth, time on page increase   2. Subscriber growth   3. Sales growth |
| 2 | “On standby for you” Campaign   * Own – AI chat on website * Twitter * Forum | * $1k | 1. Improve loyalty | 1. Sentiment score 2. Recommendations growth 3. Repeat purchase growth |
| 3 | CONTINGENCY RESERVES | * $1k | | |
| **TOTAL: $10k** | | | | |
| \*Sales Projections:  (Taught in FIN8251, Level 3, and must be pulled from there) | | | | |

# Appendix E

**Blocking Chart**

Note: The blocking chart is an excel sheet linked below. Customize it to your plan. Show your tactics associated with your media strategy over a period of 12 months. The tactics with the greatest spend should be visible over the longest period in the blocking chart.

[See Blocking Chart](https://stuconestogacon-my.sharepoint.com/:x:/g/personal/iahmed_conestogac_on_ca/EbHRfSTUz6pNqjut_4gYOG4BqfAy6TiMsCKJCATphCZjCQ?e=Yatwgx)

# Appendix F

**Risk Assessment and Contingency**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PRIORITY** | **RISK** | **L** | **I** | **CONTINGENCY PLAN** |
| HIGH | List Quad 1 risks here  Example:  YouTube series – Technical risk:   * Series interrupted with competitor ads | H | H | Give only one risk management option here for each risk  Example:   * **Mitigate**; Counter with YouTube ads on competitor channel ($1k) |
| MED | List Quad 2/3 risks here | H | L |  |
| MED |  | L | H |  |
| LOW | List Quad 4 risks here | L | L |  |

# References

References are set up in a hanging indent paragraph format. If you enter your reference information following this paragraph and then delete these words, your paragraph will be formatted correctly. You can use the “enter” key to start a new paragraph, and then type your information. See example below:

Kozier, B., Erb, G., Berman, A., Snyder, S. J., Buck, M., Yiu, L., & Stamler, L. L. (2014). *Fundamentals of Canadian Nursing: Concepts, Process, and Practice*. Pearson Canada. (Delete this before you start your references. This example is just to set up the hanging indent feature.)