

Creating a Marketing Communications Plan:

a proven approach and premium tool-kit

Follow this **simple**, step-by-step, methodology to create a **marketing** communications **plan** that supports its **marketing** strategy.

- 01 Strategy & Environment
- 02 Audience
- 03 Objectives
- 04 Messages
- 05 Channels
- 06 Budget & Measurement

What is the purpose of this methodology?

✓ To help you develop a marketing communications plan that:

- » Is guided by the corporate marketing strategy
- » Supports individual product marketing plans
- » Achieves your awareness and promotion goals

Your marketing communications plan directs how you will communicate with various audiences: employees, clients, media and others.



How to use this consulting methodology:

This methodology consists of six stages, each with a description, steps and action items.

Action items include using our premium tools & templates. Our intention with this methodology is to help you:

1. **Align** your marketing communications with your marketing strategy and positioning.
2. **Optimize** your marketing communications for your audience and each communications channel.
3. **Execute & Measure** your plan using our planning, scheduling and tracking tools.

What is a Marketing Communications Plan?

Marketing communications (MarCom) plans are often called marketing plans or marketing strategies.

Demand Metric believes the MarCom plan is separate and supports the marketing strategy and individual product marketing plans.

The marketing strategy traditionally is more strategic in nature and broader in scope, covering the classic four Ps of the marketing mix:

- ✓ **Product**
- ✓ **Promotion**
- ✓ **Place**
- ✓ **Price**

The MarCom plan is more tactical in nature and focuses primarily on **Promotion**.

Outputs from this Planning Process:

Stage 01 – Environmental Assessment

Stage 02 – Audience Understanding, Customer Profiles

Stage 03 – MarCom Plan Objectives

Stage 04 – Key Messages

Stage 05 – MarCom Channel Selection, Plan & Schedule for Each Channel

Stage 06 – Consolidated Budget, Master Calendar, MarCom Dashboard

Strategy Review

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STAGE 01 – STRATEGIC DIRECTION

Begin the creation of your MarCom plan by reviewing corporate marketing strategy. If no corporate marketing strategy exists, Demand Metric recommends you develop one before attempting to create a MarCom plan.

Use the [Marketing Strategy Plan Methodology](#) as a guide for this strategic process.

The goal of this stage is to ensure your MarCom plan supports the strategic direction of your company. You'll examine the overall marketing strategy and objectives, review or complete a competitive analysis and assess environmental influences.

Strategy Review

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STEP 1 – Marketing Strategy Review

- ✓ Action Item – If you have not developed a Marketing Strategy, do that first before attempting to create your MarCom Plan. Use the [Marketing Strategy Plan Methodology](#) to do this.

Regardless of how your marketing strategy was developed, refer to it to get the context for developing your MarCom plan:

- What products or initiatives will your MarCom plan support?
- What core values or strategic objectives should influence the development & content of the MarCom plan?
- What core competencies can you exploit or showcase through this MarCom plan?



Strategy Review

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STEP 2 – Environmental Assessment

Understand where the company or brand has been, the current position, where it needs to go and how it will get there.

Consider your external environment & assess the influences they will have on your MarCom plan:

Consideration	Demand Metric Tool or Template
Brand Awareness	Brand Assessment Tool
Political, Regulatory and Economic	STEP Industry Analysis Tool
Competition	Competitor Analysis Tool
Media coverage	Competitive PR and Advertising Analysis

Audience

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STAGE 02 – MARCOM PLAN AUDIENCE

During this stage you will identify all the audiences you need to reach with your MarCom plan.

Common target audiences for a MarCom plan include:

- ✓ Customers
- ✓ Media
- ✓ Market & Research Analysts
- ✓ Employees
- ✓ Industry thought leaders
- ✓ Business Partners

Audience

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

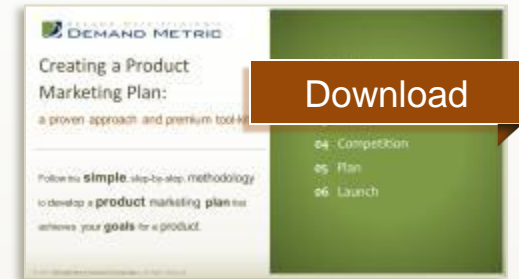
06 Budget & Measurement

STEP 1 – Audience Identification

- ✓ Action Item – Identify each audience your MarCom plan will address. “Audiences” are types of businesses or people that share common characteristics (e.g. “Community Banks” or “Active Seniors”). You’re better served defining your audiences as narrowly as possible.

Identifying and understanding your audiences helps you:

- Create messages specifically for each audience.
- Understand which communications channels and tactics can best reach your audience with your message.



Helpful Hint - If you are creating this MarCom plan to support a [Product Marketing Plan](#), refer to the market segments identified in that plan to help identify and understand your audiences.

Audience

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STEP 2 – Develop Personas

- ✓ Action Item – Create Personas, a hypothetical profile, for each audience you've identified using the [Customer Profile Template](#).

Personas will help you:

- Focus your communications on the needs of your audience.
- Create messages for a specific person rather than a nebulous group.

Helpful Hint - If you are creating this MarCom plan to support a [Product Marketing Plan](#), refer to any Personas developed to support that plan.



Objectives

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STAGE 03 – MARCOM PLAN OBJECTIVES

Your MarCom plan objectives ideally are a subset of your marketing strategy's objectives and are specific to communications.

In this stage, you will write your communications objectives for each audience you intend to reach through your MarCom plan.

Objectives

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STEP 1 – Marketing Strategy Objectives

- ✓ Action Item – Review your corporate [Marketing Strategy Objectives Scorecard](#) to help frame the development of your MarCom objectives.

While business objectives are different from communications objectives, the latter should support the former. Regardless of how you developed your marketing strategy, take time to understand how it should direct the setting of your MarCom plan objectives.



The image shows a screenshot of a 'Marketing Strategy Scorecard' from Demand Metric. It is a table with three main sections, each with a green header. The first section is 'Objective 1 - Increase Market Penetration of Current Products', the second is 'Objective 2 - Improve Customer Retention & Satisfaction', and the third is 'Objective 3 - Implement Marketing Technology'. Each section contains a table with three columns: 'Programs, Initiatives, & Actions', 'Key Performance Indicators & Metrics', and 'Target Timeframe to Achieve Goals'. A large orange 'Download' button is overlaid on the right side of the scorecard.

Marketing Strategy Scorecard		
Objective 1 - Increase Market Penetration of Current Products		
Programs, Initiatives, & Actions	Key Performance Indicators & Metrics	Target Timeframe to Achieve Goals
Identify new markets for existing products	# New Markets for Existing Products	1 New Market for Existing Products in 2012
Customer education campaign (product use cases)	# Customers Attending Product Education Workshop	50% Customer Attendance in 2012
Objective 2 - Improve Customer Retention & Satisfaction		
Programs, Initiatives, & Actions	Key Performance Indicators & Metrics	Target Timeframe to Achieve Goals
Voice of Customer	# New Ideas for R & D	
Customer Support Portal	Portal Launch Date	
Customer Satisfaction Surveys	Net Promoter Score, # Surveys Completed	GetNPS Benchmarks in 2012
Objective 3 - Implement Marketing Technology		

Helpful Hint - If you used the [Marketing Strategy Plan Methodology](#), refer to Stage 4.

Objectives

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STEP 2 – Determine Your MarCom Objectives

MarCom plan objectives often fall into one of the following categories:

- ✓ **Educate or inform**
- ✓ **Change perception**
- ✓ **Enhance brand status or reputation**
- ✓ **Create sales leads**
- ✓ **Recruit partners or employees**
- ✓ **Generate media coverage**

Based on what you know about your audience, determine a primary objective for your MarCom plan.

Objectives

01 Strategy & Environment

02 Audience

03 Objectives

04 Messages

05 Channels

06 Budget & Measurement

STEP 3 – State Your MarCom Objectives

- ✓ Action Item – Use [MarCom Objectives Worksheet](#) to write your MarCom plan objectives for each audience your plan will address, including each of the following elements:

1. Target audience for the communications
2. The desired or ideal response to these communications
3. Indicators or measures of response
4. The timeframe over which the communications should occur and the response made

Goal	Target Audience	Ideal Response	Response KPIs	Timeframe	Marcom Objective
To create awareness of the new "Services" page	Members	Members visit the new "Services" page on website	70% of members visit the new "Services" page	End of Q2 2012	To inform members of new services offerings provided by our company, so that at least half our members visit the new "Services" page on our website by the end of Q2 2012.
To inform of new content that has been added to the website	Members	Members visit a new content page on the website and click "Download"	25% increase in the number of new content downloads (excluding members)		To create awareness of new content that has been added to the website, so that members visit the website and click "Download"

Example: To inform members of new services offerings provided by our company, so that at least half our members visit the new "Services" page on our website by the end of Q2 2012.

Messages

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STAGE 04 – MESSAGE CREATION

To this point, you've determined the objectives and audience for your MarCom plan. During this stage, you'll create the messages which will serve as the building blocks for your plan. The messages you create provide information designed to get the audience to respond in some desirable way.

Your messages are not the actual communications themselves, but summaries of what you wish to communicate. These messages will help you create your actual communications, which can include:

✓ **Press Releases**

✓ **Ad Copy**

✓ **Web Content**

✓ **Other**

Messages

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 1 – Primary Message

- ✓ Action Item – Author your primary message. As you do so, reference any relevant positioning information.

If none exists, use the [Positioning Statement Worksheet](#) to develop it now.

Your primary message articulates the main thing you need your audiences to know and will:

- ✓ State what you're doing and why
- ✓ Have consistency with your MarCom plan objectives
- ✓ Address all identified audiences

The image displays two versions of the 'Positioning Statement Worksheet' from Demand Metric. The larger version on the left is a full-page document with sections for Purpose, Product Name, Product Description, Target Market Segment, and a table for Market Positioning. The smaller version on the right is a thumbnail of the same worksheet, showing a table with columns for For, Product is, Ideal for, Better than, and Because, and rows for Key Criteria and Examples.

	For	Product is	Ideal for	Better than	Because
Key Criteria	Identify ideal market segments	Provide concise description	Describe best use or application for product	Identify primary competitor or competing approach	One differentiation and other evidence to back-up your claim of superiority
Example	The business person who is starting a new company	Software that produces a business plan	Quickly creating a professional plan quickly and easily	(Competitor)	It is a great alone product and requires no other programs to buy or learn

Download

Messages

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 2 – Message Refinement

- ✓ Action Item – Use the [Message Mapping Tool](#) to document the key messages that are important for your target audience to hear about your product.

For each identified audience, determine what each needs to know that is unique. For example, a media audience may need amplification of your primary message through a set of secondary messages in a different way than your employee audience. Determine your secondary message requirements now and author them.



Messages

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

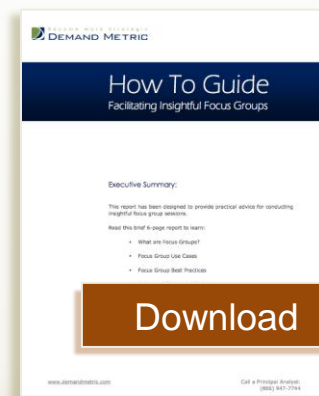
05 Channels

06 Budget & Measurement

STEP 3 – Test Messages

- ✓ Action Item – Conduct some qualitative research, such as a focus group, to test the efficacy of your message(s). Use the free How-To Guide, “[Facilitating Insightful Focus Groups](#)” to help do this.

Before committing to the messages you’ve crafted as the foundation for your marketing communications, make sure they resonate with your audience. You must have some assurance that your audience cares about the messages you desire to communicate.



Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STAGE 05 – CHANNEL SELECTION

With Strategy, Audience, Objectives and Messages determined, this Stage will lead you through the process of identifying the optimal channels for delivering your marketing communications.

Few companies have the resources to fully exploit all possible marketing communications channels. Rather, they must be selective and base decisions on a set of criteria. During this stage, you'll identify the optimal set of channels and schedule communications through them.

Plan

01 Objectives

02 Product

03 Market

04 Competition

05 Plan

06 Launch

STEP 1 –Channel Evaluation & Selection

- ✓ Action Item – Use the [Marketing Channel Ranking Tool](#) to evaluate current and planned MarCom channels. Based on this assessment, select the mix of channels you will use to support this MarCom plan.

The right mix rarely includes all possible channels, and usually includes more than one. Use **Brand Perception Effectiveness**, **Lead Generation Effectiveness** and **Cost Effectiveness** to assess how well current and/or planned channels are performing.

Channel Scoring

Ranking channels that you would like to evaluate and select based on the pre-selected criteria and scale of 1-10 based on how strongly you agree/disagree

Channel	Brand Perception Quality			Lead Quality			Cost/View			Total Costs
	Brand Perception	Market Yields	Accountability	Market Engagement	Purchase Responsibility	Conversion Potential	Production Time/Cost	Delivery Cost	Other Costs	
Weighting	20%	20%	10%	10%	15%	15%				
Website	8	8	8	8	8	8	\$ 1,000	\$ 1,000	\$ 900	\$ 3,900
eNewsletter	7	7	7	7	7	7	\$ 150	\$ 150	\$ 900	\$ 1,200
Blog	5	5	5	5	5	5	\$ 1,500	\$ 1,500	\$ 900	\$ 3,900
PPC Ads	5	5	5	5	5	5	\$ 1,000	\$ 1,000	\$ 900	\$ 2,900
Video Ads	5	5	5	5	5	5				
Press Releases	8	8	8	8	8	8				
Productized Leads	8	8	8	8	8	8				
Direct Mail	7	7	7	7	7	7				
Video Ads	5	5	5	5	5	5	\$ 1,000	\$ 1,000	\$ 900	\$ 2,900
Press Releases	8	8	8	8	8	8	\$ 2,000	\$ 2,000	\$ 250	\$ 4,250
Productized Leads	8	8	8	8	8	8	\$ 150	\$ 150	\$ 250	\$ 500

Download

- ✓ Helpful Hint – Use the [Campaign Impression Calculator](#) to compare costs for each of these channels.

Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 2 – Events

✓ Action Item – If your channel mix includes Events:

1. Use the [Tradeshow Evaluation Matrix](#) to assess your options
2. Track all events and tradeshows using the [Events Database Template](#)
3. View the complete set of [Tradeshow and Event Planning Tools](#)



Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 3 – Social Media

✓ Action Item – If your channel mix includes Social Media:

1. Use the [Social Media Channel Selection Tool](#) to narrow your Social Media channel selections
2. Schedule your communications through these channels using the [Social Media Posting Calendar](#)
3. View the complete set of [Social Media Marketing Tools](#)



Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 4 – Public Relations

✓ Action Item – If your channel mix includes Public Relations:

1. Properly write and format your Press Releases using the [Press Release Template](#)
2. Schedule the issuing of your Press Release using the [Public Relations Calendar](#)
3. Track editorial opportunities using the [Editorial Calendar Template](#)
4. View the complete set of [Public Relations Tools & Templates](#)



Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 5 – Web & Online

✓ Action Item – If your channel mix includes Web & Online:

1. Determine what new or modified web content is required to support your MarCom plan
2. Use the [Web Content Audit Tool](#) to help complete your assessment
3. Make sure your content is optimized for Search. Reference the How-to Guide, [“Simplifying Search Engine Optimization”](#) for more information
4. View the complete set of [Website Development Templates](#)



Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 6 – Mobile

✓ Action Item – If your channel mix includes Mobile:

1. If you have not yet exploited the Mobile channel, take the [Mobile Marketing Readiness Assessment](#)
2. Use the [Mobile Marketing Channel Selection Tool](#) to narrow your mobile channel selections
3. View the complete set of Demand Metric [Mobile Marketing Tools & Templates](#)



Channels

01 Strategy & Environment

02 Objectives

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 7 – Advertising

✓ Action Item – If your channel mix includes Advertising:

1. Use the [Advertisement Evaluation Matrix](#) to test the effectiveness of your advertising concepts
2. Use the [Advertising Plan Checklist Template](#) to develop your advertising plan
3. Schedule and track your plan using the [Advertising Calendar & Budget Template](#)
4. View the complete set of [Advertising Tools & Templates](#)



Channels

01 Strategy & Environment

02 Objectives

03 Audience

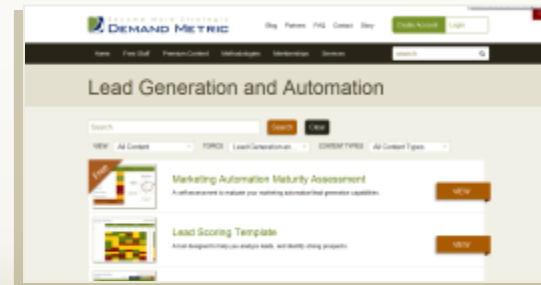
04 Messages

05 Channels

06 Budget & Measurement

STEP 8 – Lead Generation

- ✓ Action Item – If your channel mix includes Direct Marketing (e.g. email) for Lead Generation:
 1. Use the [Qualified Lead Definition tool](#) and ensure that Marketing & Sales agree on a definition
 2. Use the [Lead Generation Prioritization Tool](#) to evaluate lead generating alternatives
 3. If your lead generation plan includes email, read [Effective Email Marketing Campaigns](#) for guidance.
 4. View the complete set of [Lead Generation & Automation Tools](#)



Budget & Measurement

01 Strategy & Environment

02 Situation

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STAGE 06 – BUDGET & MEASUREMENT

Finish this MarCom planning process by building your budget and determining how you will measure your MarCom Plan's results.

Budget & Measurement

01 Strategy & Environment

02 Situation

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 1 – MarCom Budget

- ✓ Action Item – Use the [Marketing Communications Budget Template](#) to develop and track the budget for the channels and campaigns you identified in Stage 5 of this methodology.

Your marketing communications budget will include:

- Total Budget
- Year To Date Spend
- Budget Remaining (\$ and %)
- Budget Category Breakdown

Budget Category	Total Budget	YTD Spend	Budget Remaining	% Remaining	Jan	Feb	Mar	Apr	May	Jun
Press Conferences	\$50,000	\$10,000	\$40,000	80%	\$10,000	\$0	\$0	\$0	\$0	\$0
Media Outreach	\$50,000	\$0	\$50,000	100%	\$0	\$0	\$10,000	\$0	\$0	\$0
Marketing Events	\$50,000	\$10,000	\$40,000	80%	\$0	\$0	\$0	\$0	\$0	\$0
PR Agency Fees	\$50,000	\$50,000	\$0	0%	\$0	\$0	\$0	\$0	\$0	\$0
Content Publishing	\$50,000	\$0	\$50,000	100%	\$0	\$0	\$0	\$0	\$0	\$0
Webinars (w/PR)	\$50,000	\$10,000	\$40,000	80%	\$0	\$0	\$0	\$0	\$0	\$0
Press Release Distribution	\$50,000	\$0	\$50,000	100%	\$0	\$0	\$0	\$0	\$0	\$0
Personnel Expenses (PR)	\$50,000	\$0	\$50,000	100%	\$0	\$0	\$0	\$0	\$0	\$0
Writing Costs	\$50,000	\$10,000	\$40,000	80%	\$0	\$0	\$0	\$0	\$0	\$0
Analysis (PR & Business Reports)	\$50,000	\$0	\$50,000	100%	\$0	\$0	\$0	\$0	\$0	\$0
Totals	\$1,000,000	\$100,000	\$900,000	90%	\$100,000	\$0	\$100,000	\$0	\$0	\$0

Budget & Measurement

01 Strategy & Environment

02 Situation

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 2 – MarCom Calendar

- ✓ Action Item – Use the [Marketing Communications Calendar](#) to create a master calendar of all channel activity and campaigns you identified in Stage 5 of this methodology.

The communications you could prepare may include:

- Advertisements
- Public Relations
- Social Media
- Mobile Marketing
- Events
- Other



Helpful Hint - Ensure that each communication properly reflects the key messages you identified.

Budget & Measurement

01 Strategy & Environment

02 Situation

03 Audience

04 Messages

05 Channels

06 Budget & Measurement

STEP 3 – MarCom Dashboard

- ✓ Action Item – Develop and implement your MarCom Plan dashboard. Use the [Key Marketing Metrics Dashboard](#) to define, track & report on key metrics.

Carefully review the metrics and systems for capturing them:

- Ensure that the measurement systems are in place to track progress toward these objectives
- Consider other measurements you should add to ensure your strategy is effective



Helpful Hint - Review the How-to Guide, [Marketing Dashboard Best Practices](#) to gain a better understanding.

Conclusion

- ✓ At the end of any business process, it's always a good idea to review it and identify areas for improvement.
- ✓ Demand Metric has the tools and expertise to help you build an effective MarCom Plan
 - » Create or audit your MarCom plans
 - » Assist with using any of the tools referenced in this methodology
 - » Provide hands-on marketing assistance to accelerate achieving your marketing department's goals.

To learn more, simply contact Demand Metric: info@demandmetric.com