

# Marketing Planning

Building a  
Foundation  
for Success



Illustration by Jay Janousek for The Partner Channel

**W**ould you build a house without a blueprint? Would you start laying the foundation before you knew how big the house was going to be or what the overall structure was going to look like? I think most of us would answer “no” to those questions. But when it comes to building your business, sometimes we forget that we have to put the foundational pieces into place before we can really have a solid structure to build on.

I use this simple analogy to stress the importance of marketing planning, especially when it comes to your business. Would you market your services without knowing who your target audience is? Would you spend your hard-earned dollars on developing and executing a marketing campaign without knowing how many leads you needed to generate through marketing to reach your revenue goals?

When it comes to marketing, many organizations struggle to give adequate attention to planning their marketing actions. Many times, leadership within an organization wears many hats, and marketing seems to get put on the back burner or is done inconsistently, resulting in lackluster results.

In consulting with Microsoft Partners across the United States, I see organizations experience this time and time again. And, if leadership could spend just a little time thinking through a plan of action BEFORE “pouring the foundation,” I think they’d see how marketing can truly impact their business.

Here are some simple steps you can follow to help in your marketing planning process:

### **Market Understanding and Segmentation**

Having trouble really understanding *who* you should be targeting? To really market effectively, you need to understand what market you are trying to reach. Look at your existing customer base, and see if there are any consistencies as far as industry focus. You can also review your internal staff capabilities and see where you have the greatest skill sets.

Market segmentation can help you under-

stand and appeal to the needs of a specific group. You can segment the market by looking at demographics (company size, number of employees), geographies, and specific industry type(s) (manufacturing, distribution, and so on). For instance, your company may have specific expertise in ERP systems for automotive manufacturing companies within a particular geography. Maybe your goal is to expand into a new geography. Here are a few online resources you can use to help better understand a particular market within a geography:

- » [www.zapdata.com](http://www.zapdata.com)
- » [www.hoovers.com](http://www.hoovers.com)
- » [www.firstresearch.com](http://www.firstresearch.com)

### **Marketing as it Relates to Your Goals**

What are your revenue goals for the year by product and services? How many new customers do you want to add?

Once you have your business goals defined, start looking at specific marketing goals. These goals could include:

- » Increase existing customer revenue by 30 percent
- » Launch a new product or service offering
- » Expand an existing industry specialization into another geography

Answering the questions above will help when it comes to deciding how many leads you need to drive for your organization. Microsoft has a great online lead generation calculator that you can use to really understand how many leads you truly need to drive through your marketing efforts and reach your revenue goals. You can view the Marketing Leads Calculator at <https://mbs.microsoft.com/downloads/partner/marketing/marketingleadcalculator.xls>.

### **Define Marketing Mix and Prioritize**

With what seems an infinite number of marketing tactics to choose from, how do you decide? Try not to tackle too much. If you know you have limited resources to execute the plan or a small budget, choose tactics that will be the most beneficial to meeting your goals.

When looking at marketing tactics, I always like to recommend using a “mix” of

activities. With so many ways to reach out to prospects and customers, select a combination of pieces and delivery methods to ensure that qualified, interested customers hear your message. Rather than spend an entire budget on one type of activity such as telemarketing, I suggest a multipronged approach.

In addition, when deciding which tactics to execute, consider the overall cost, and weigh the pros and cons of each. For instance, if you have a small budget, you want to choose activities that are low-cost but give you the ability to reach a targeted audience. In this case, you may choose to do a targeted E-mail campaign and provide a strong marketing offer with a call to action back to your Web site, where you can tell your whole story and easily customize your message.

For those with larger budgets, you may consider doing an integrated campaign using a direct mail letter, telemarketing, and an event. Integrated campaigns using multiple tactics and touchpoints are often more successful. Remember that prospects respond to messages in different ways. Some prospects are more apt to open a business letter and read it; some will not. Some prospects will take a phone call, and others won’t be bothered. Having multiple ways to touch your target audience will help drive better campaign results.

### **Marketing Calendar and Budget**

Once you have outlined your marketing goals and your marketing tactics, start outlining each in a marketing calendar.

The calendar or schedule should cover a 12-month timeframe, breaking down initiatives month-by-month or by quarter. The calendar should also include what each activity will cost.

Here are some key components to the marketing calendar:

- » **Marketing Activity Type** – i.e. industry-specific webcast
- » **Activity Description** – i.e. event invitation mailing to 500 prospects
- » **Activity Objective** – i.e. 7 percent registration rate
- » **Estimated Costs** – i.e. \$1,000
- » **Description of What the Costs In-**

**clude** – i.e. design/layout, printing, and postage

» **Execution Responsibility** – i.e. marketing develops and executes the invitation and mailing; sales completes the phone follow-up

Once you've completed the marketing plan, calendar, and budget, be sure to review it internally with your staff so that everyone in your company understands the goals and objectives. Also, clearly spell out the line of responsibility to executing the plan since in most Partner organizations, it's a team effort.

### Track and Measure Your Success

Every campaign takes time to mature and begin to show results in the market. Be patient, keep focused, and remember it takes time (typically three to nine impressions) for prospects to begin to pay attention and take action.

Tracking the progress of your marketing efforts and building benchmarks are key to understanding what's working and what might need to be adjusted. After each campaign has been executed, record the responses to gauge their effectiveness. Make

sure that you build in a response mechanism to your campaigns through your Web site, for instance. Let's say you host a webcast series and you send E-mail invitations to your prospect list. You can use your Web site to register attendees or even Microsoft's external event registration site, Click to Attend ([www.clicktoattend.com](http://www.clicktoattend.com)). From there you can track who registered and who actually attended. Being able to track overall response rates and associate your results back to your campaign costs will help you determine the success of a campaign and the overall return on investment (ROI).

### Getting Started

Developing a marketing plan may seem difficult, time consuming, and for some, a painful experience. But, it doesn't have to be! I think once you have a plan in place, you will find that it's an essential tool in helping you build your business.

Microsoft has valuable online planning tools to help get you started in the right direction:

» **Marketing Development Plan Template** – learn how to organize and create a marketing plan: [https://mbs.](https://mbs.microsoft.com/partnersource/communities/marketing/resources/marketingcreativeresources/template.htm)

[microsoft.com/partnersource/communities/marketing/resources/marketingcreativeresources/template.htm](https://mbs.microsoft.com/partnersource/communities/marketing/resources/marketingcreativeresources/template.htm)

» **Marketing Calendar Template** – learn how to plan your budget and marketing activities: <https://mbs.microsoft.com/partnersource/communities/marketing/resources/marketingcreativeresources/marketingcalendar.htm>

If you feel you'd rather outsource it, that's also an option. The Partner Channel offers an outsourced marketing solution for marketing planning. Known as the Virtual Marketing Director (VMD) program, you can engage with an experienced marketing consultant to help you research and develop an integrated marketing plan, calendar, and budget. In addition, the VMD can work with you and your organization to help execute and track the results, keeping you focused and moving in the right direction. For more information on the program, contact Cheryl Strege at 605-574-9432 or [Cheryl@thepartnerchannel.com](mailto:Cheryl@thepartnerchannel.com) or myself, Jennifer Culbertson, at 614-453-5927 or [Jennifer@thepartnerchannel.com](mailto:Jennifer@thepartnerchannel.com).

Good luck, and happy marketing! 🍀

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