

Ten Simple Steps to Creating a Marketing Plan

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host of The PR Maven® Podcast



1 Start with the end in mind.

For any marketing communications campaign to be successful, you need to know what you want to get out of it. This means start with the end in mind — what is your goal? Are you hoping to strengthen your brand? Do you want more business coming through your doors? Do you want to generate more online sales? Once you know what you want out of your marketing and PR efforts, it will be easier not only to achieve your goal, but also plan and budget accordingly.

Whatever your goal is, it should be measurable. You don't want it to be as simple as just getting new business. Be specific. For example, you could set a goal of recruiting at least three new clients per quarter. Or, if you are a nonprofit, maybe you want to increase donations by five percent over the course of a year.



2

Define Your Unique Branding Proposition.

An important part of any marketing plan process is the development of your unique branding proposition, also called an “elevator pitch” or an XYZ statement. An XYZ statement is the equation “We do X for Y, so they can Z.” When spoken, it becomes a ‘seven second sound bite,’ which is something that broadcast media interviewers want when they are interviewing someone.

“We do X for Y, so they can Z.”

Here’s the XYZ for Marshall Communications:

Since 1991, Nancy Marshall Communications has provided strategic public relations and marketing services for local, national and international clients so they can achieve measurable results and increase their bottom line.

Your XYZ statement should be powerful. Really think about what keeps your clients or customers up at night, and how your product or service solves that problem for them. Once your XYZ is nailed down, it will serve as the basis for your entire brand platform. Make it your mantra. Put it on your website in the most prominent location on the upper left hand corner of your home page, so visitors to your site immediately know they are in the right place.

Also, make sure your entire team knows your XYZ by heart, and everyone says it repeatedly during media interviews and speaking engagements. Consider printing your XYZ on the back of your business cards to reinforce the message.



3

Tell Your Story.

Every organization and every individual has a story to tell. In the world of PR and marketing, we call this story your brand manifesto. A brand manifesto is a written declaration of what a company or person stands for and what makes them distinctive. Sharing your manifesto gives your company (or you) an identity that people can connect with and get behind. By reading it, they get a deeper feel for who you are as a person or organization.

You don't have to be a professional author to develop one, either. Just tell your story honestly and genuinely.



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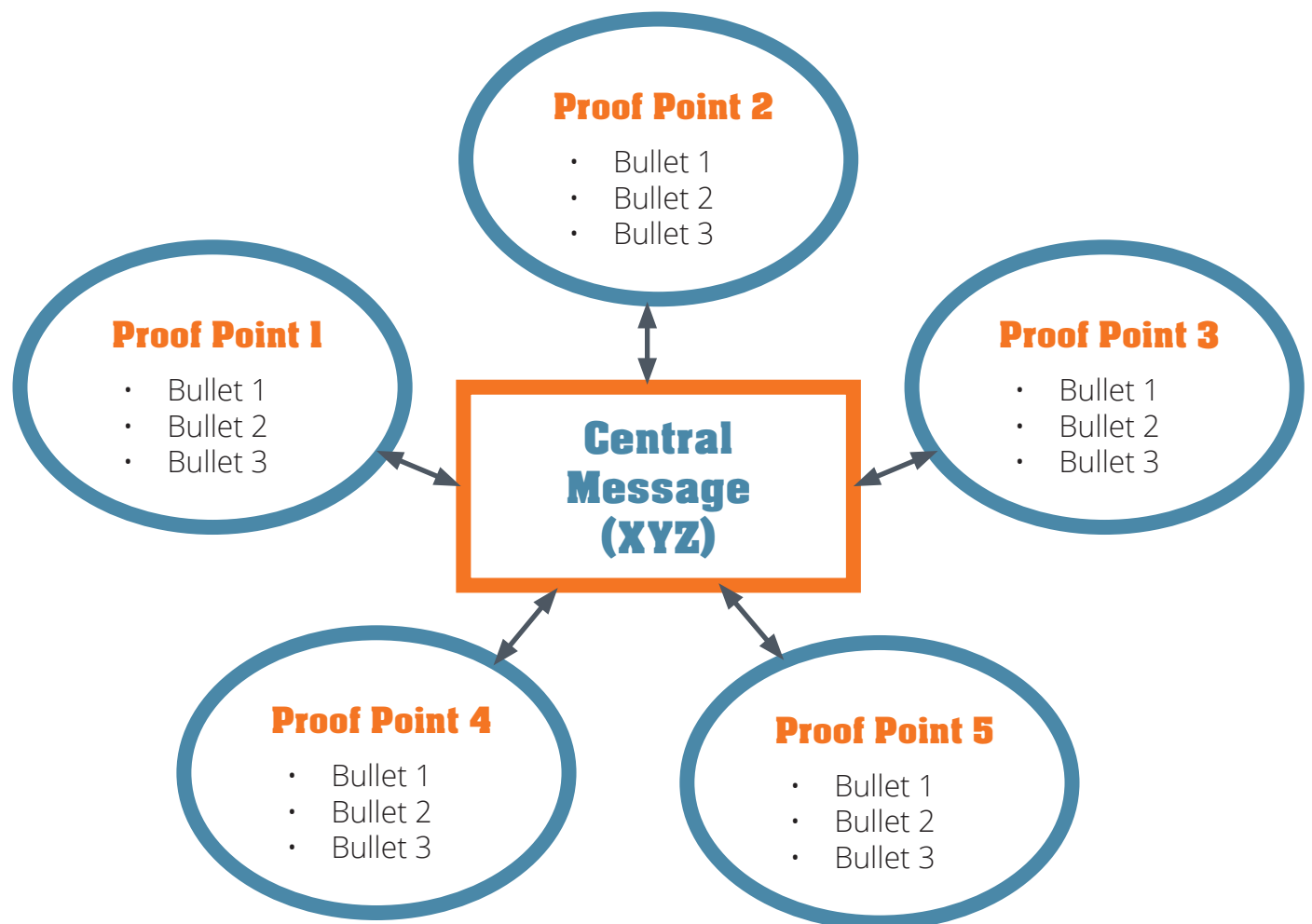
Map it out.

The message map is intended to work as a song sheet, ensuring that all those representing your company are consistently “singing” from the same page when speaking to any of your target audiences. It is especially handy in keeping media interviews on track and ensuring spokespeople cover all key messages, no matter what a reporter’s topic might be. The key message, or seven-second sound bite, can be repeated several times in the course of an interview in order to reinforce its importance.



This graphic representation of your key messages is used to ensure all central points are touched upon consistently. The content of your message map should closely mirror the content of your brand manifesto.

At the center of the message map is your XYZ statement. This message captures the essence of your company's brand in a nutshell. Branching off from that central message are secondary messages, sometimes called proof points, pulled directly from the central message and connected to it like spokes on a bicycle wheel. Underneath each secondary message are related statements, generally fact- and figure-based, that support the validity of your secondary messages.



5

Determine your target audiences.

Creating avatars can be a fun exercise. Avatars are fictitious people that represent your target audiences. We assign them names, faces, demographic information, psychographic information or personal interests, even a type of car they drive. Avatars make it easier to visualize exactly who you are marketing to as you develop your plan. It ensures that any marketing tactics you develop are directly appealing to the needs, concerns and passions of your target audiences. When you are writing copy, you can picture your avatars in your mind and write as if you are speaking directly to them.



Here are two avatar examples created for a seaside resort in Maine:

A. Eleanor and Harry Byrd: Seniors in their late 70s

Until recently, they lived Marblehead, Massachusetts, and they used to own a sailboat. They now live in a retirement community for active adults in New Hampshire. Since they can't manage their sailboat on their own anymore, they sold it, but they still enjoy sailing, just with someone else at the helm. They drive a Mercedes Benz and they are enjoying a comfortable retirement. Harry worked as a physician and Eleanor was a stay-at-home mom who took care of their four children who are all married now and have two children each of their own. They read Smithsonian magazine and listen to National Public Radio. They love to take short vacations during the week to the Maine coast. The seaside resort is a perfect fit for them as it also offers private sails from its marina.



B. Jamie and Phil Silva: Young couple in their mid-20s

They have been married for only a year and have no children. They travel on a tight budget, but they value their time together since they both work a lot of hours in their jobs at start-up internet companies in Portland, Maine. They have a yellow lab that they bring on vacation with them, and they enjoy sea kayaking, hiking and biking. They drive a Toyota Rav 4 with a Thule rack that carries their bikes and their kayaks. The seaside resort is a great fit for them because it offers affordable vacation packages during the early spring and late fall, it is not far from Portland, it is pet friendly, and the Silvas can indulge in all their favorite outdoor pursuits on site.



6

Check out the competition.

Analyzing the competition is a crucial part of the marketing planning process. You can learn a lot from their best practices and their mistakes. Here are a number of things you can examine and learn from:

- ✓ Their website
- ✓ Their brand
- ✓ Their sales/promotional materials
- ✓ Their social media presence
- ✓ The news coverage they receive (use Google to generate a list of recent placements)
- ✓ The trade shows they attend and the special events they host
- ✓ Any promotions, contests, packages, or other special offerings they have done



7

Research. Research. Research.

Don't assume you know what your customers, donors or other stakeholders think about your business or organization. Also, don't assume you know what they want. Ask. We recommend doing some type of research — in the form of a survey or focus group — as one of the first steps in formulating a marketing plan. The information gleaned from this type of research is invaluable, and the results are likely to surprise you.



Determining what your target audiences think of you, or if they are even aware of you, provides an excellent baseline for building your brand. Being able to accurately define your customers' needs and desires — and how you can meet them — makes for a much stronger marketing strategy.

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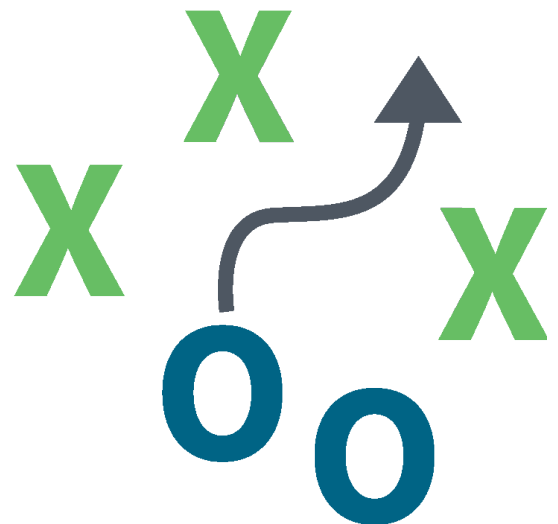
Write your marketing playbook.

Now that you've set your marketing goal, how are you going to achieve it? There are many tactics you can employ for your marketing strategy — from social media to media relations to digital and traditional marketing to advertising.

The important thing to remember is that every tactic you develop must play a role in achieving the goal you set (otherwise it does not belong in your plan), and they must be able to be realistically achieved.

Here are a few examples of some simple and easy-to-execute tactics that generate results:

- ✓ Write an opinion piece on a hot topic related to your organization and send it to the editorial page editor of your local paper.



- ✓ Follow and like the stakeholders on social media you want to like and follow you.
- ✓ Create a most-wanted media list of the journalists and news outlets your target audiences read and follow; send each contact newsworthy story ideas or press releases.
- ✓ Seek out speaking engagements that will put you in front of your target audiences.
- ✓ Organize a special event where your avatars can meet one another under your brand umbrella. They will always remember that they met each other because of your brand.



9

Set Your Budget. Develop a Timeline.

As you create your tactics, you should be thinking about how much the ideas you are putting down on paper are roughly going to cost and how much time it is going to take to implement your ideas. This will help when you sit down to develop the actual budget and timeline.

The budget should include all expenditures necessary to implement your plan. You should begin with an overall marketing budget which can then be broken down into more specific line items or tactics/initiatives. A reasonable PR and marketing budget is 3 to 10 percent of your profits.



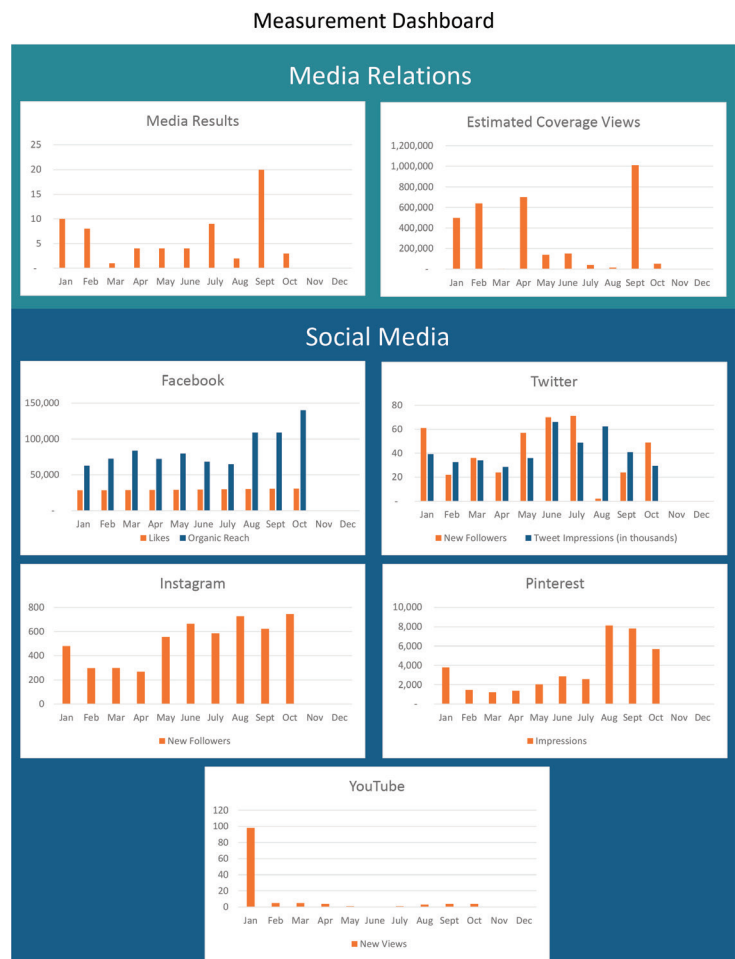
The timeline maps out all initiatives included in your marketing plan to ensure implementation stays on track. Most of the plans we create are three-year plans. We break the timelines out by quarter, creating them in the form of a check lists so tasks can be checked off right in the plan as they are completed.

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Don't forget to measure.

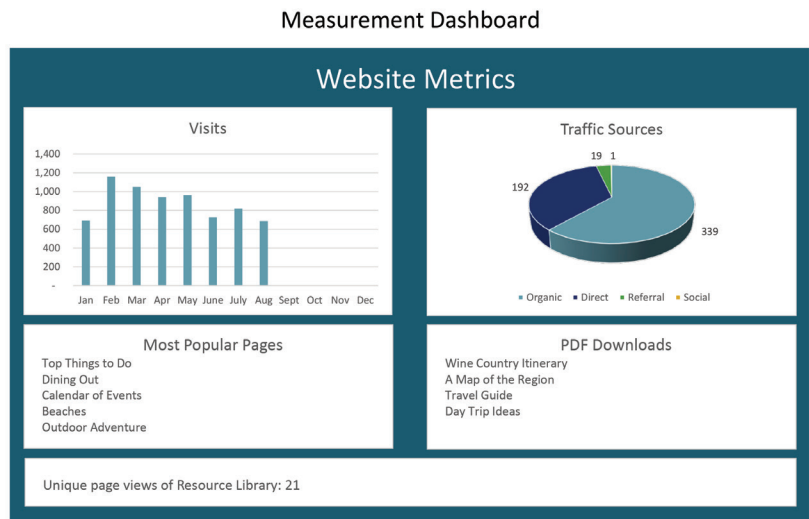
When it comes to public relations and marketing, many people neglect measurement because they feel it detracts from time they can spend doing “real” work. However, if you don't measure your efforts, you'll never know if all your hard work is actually paying off. You should want to see regular proof that your marketing and PR endeavors are generating a good return on your investment.

A beneficial tool you can create to help easily track your results is a measurement dashboard. It's also an excellent resource to have on hand if there



are stakeholders or others in your organization who will be assessing your progress, especially if those individuals control the budget.

A measurement dashboard is made visual with charts, graphs and other informational graphics, making it super easy to read and understand. When it comes to the actual metrics of success, I've found that less can actually be more. Choose those metrics that are the most important to your business or organization and focus on these rather than trying to measure the success of each individual tactic in your plan. Here are some common metrics of success:



- ✓ Website data using Google Analytics
- ✓ Social media engagement
- ✓ Number of positive media placements and total impressions (i.e. readership, viewership, listenership figures)
- ✓ Increase/decrease in sales or donations

And measure frequently. We generate measurement dashboards monthly for our clients.



Conclusion.

So now you are armed with the basics of developing a targeted, results-driven marketing plan. Hopefully this e-book has helped energize you and motivate you to begin working on your own marketing strategy, whether marketing is totally new to you or you are ready to freshen up and intensify an existing marketing playbook. For more marketing insights, advice and tips, or if you'd like to talk with our team about the full Marshall Plan® process and how it could help your organization, go to marshallpr.com/the-marshall-plan, sign up for our monthly e-news, The Marshall Report, or our monthly free webinars at marshallpr.com/webinars. You can also follow us on [Facebook](#) and [Twitter](#). I also welcome you to join PR Maven® Nation by listening to my weekly podcast, The PR Maven® Podcast, at prmaven.com/podcast.



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Now celebrating its 27th year in business, Marshall Communications provides award-winning marketing and public relations services for local, national and international businesses and organizations. With offices in Augusta and Portland, Maine, and serving clients throughout New England, the agency specializes in the tourism, outdoor recreation, education, health care, and service industries. Marshall Communications guides clients through The Marshall Plan® process, a customized approach to marketing strategy development tailored to their business objectives. The agency was awarded the Maine Public Relations Council's top honor, Best in Show, at the council's 2016 and 2017 Golden Arrow Awards ceremony and agency founder and CEO Nancy Marshall, known as The PR Maven®, is a past recipient of the Maine Public Relations Council's Edward L. Bernays Award, recognizing the top PR professional in the state of Maine. She is the author of the 2015 book, [PR WORKS!](#) Nancy recently launched The PR Maven® Podcast, which can be found at prmaven.com/podcast.