

Creating a Marketing Plan that Drives Results



Presented By:

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AGC Business Development Forum

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Top 5 Reasons You Need a Plan

1. Businesses with a plan have a 50% higher success rate
2. To force you to research and really know your market, your competition and your customers
3. To uncover new opportunities
4. To benchmark your success – and failures
5. To keep everyone moving in the same direction



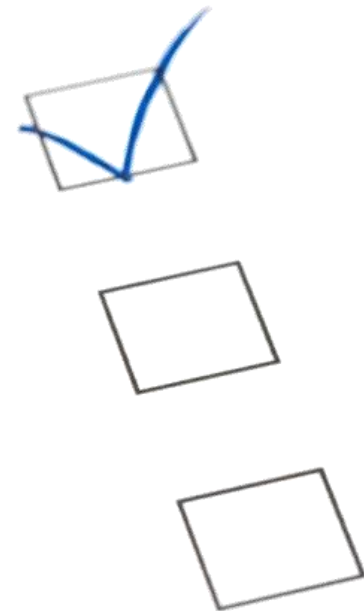
Definitions

Strategic Plan

- 3-5 Year Outlook
- Defines Firm's Relationship to Its Markets/Clients
- Creates a Distinguishing Culture and Image
- Provides Communication to Entire Firm

Marketing Plan

- The One-Year Increment
- Features Specific Action Items



Strategic Plan: Your 3-5 Year Road Map

Provides:

- Consensus
- Clarity
- Control
- Consistency



- ✓ *Eliminates Guesswork about Where/When*
- ✓ *Leads to Sustainable Competitive Advantage*

Start with the Basics



Strategic Planning –Mission Statement

Defines the core purpose of the organization:

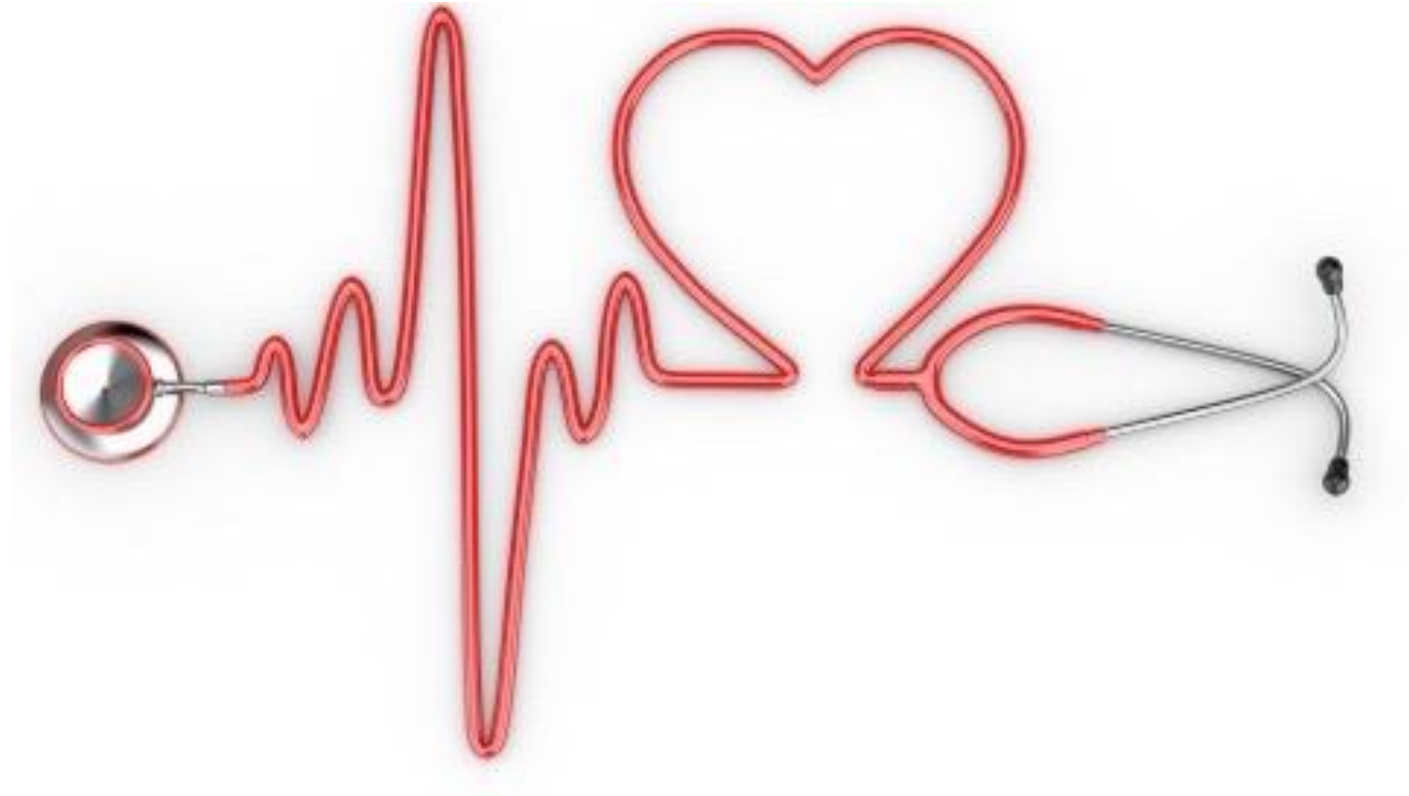
- Supplies energy and motivation
- Inspiring
- Long-term vision
- Easily communicated and understood



Strategic Planning –Mission Statement, Vision, Core Values

Mission is the “heartbeat”:

- Who you are
- What you do
- What you stand for
- Why you do it



Marketing Plan – *the 1-Year Component*

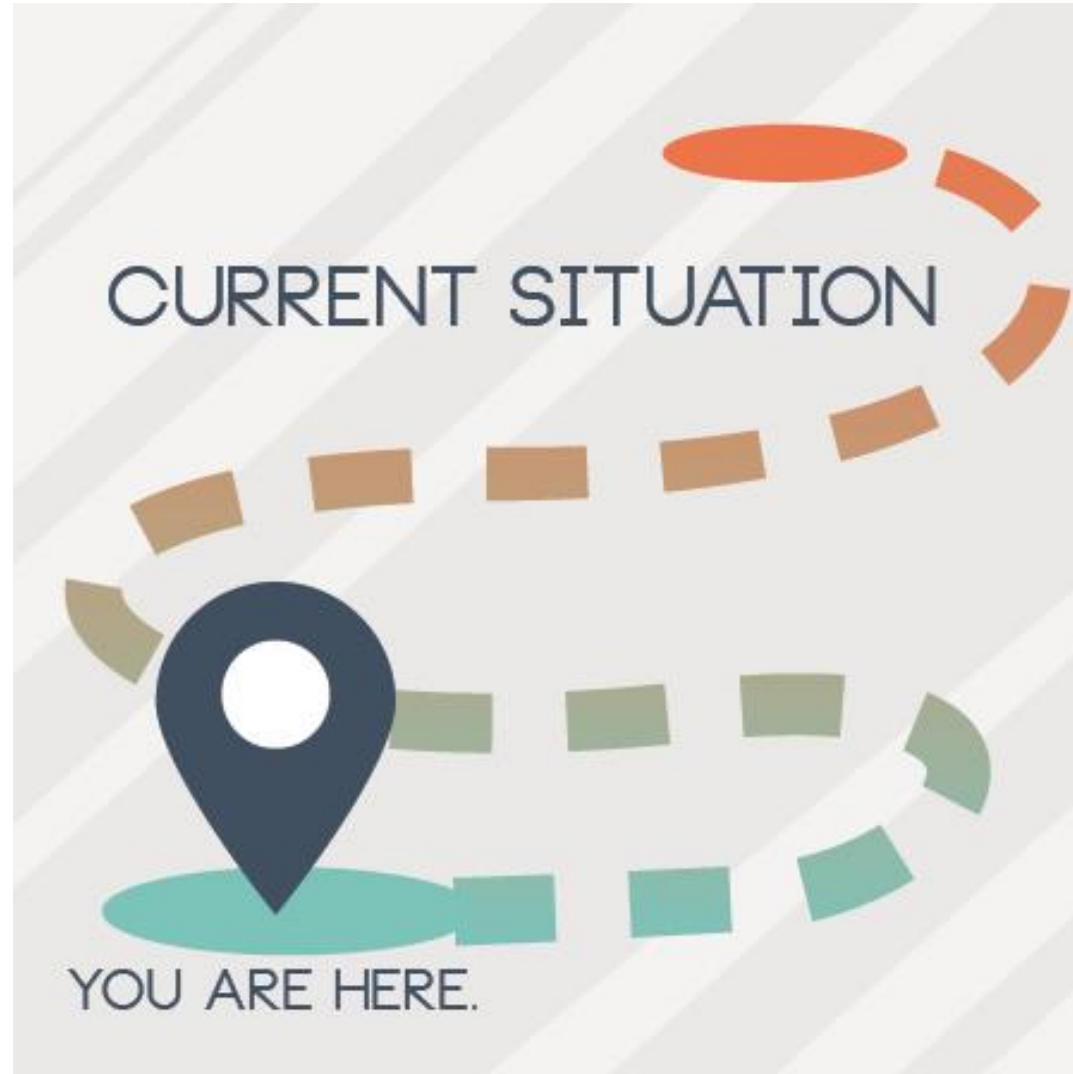
- Based on Strategic Plan
- Links the Two Together
- Next Level of Detail



Why Is a Marketing Plan Important?



Where are You?



Current Situation

- Narrative
 - Viewpoint on successes and misses
 - Clients
 - Markets
 - Operationally
 - Marketing approach
 - Internal projects



Strategic Alignment is Key



Play to Your Strengths, Seize Opportunities



SWOT

INTERNAL		EXTERNAL	
STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS

What's Next?

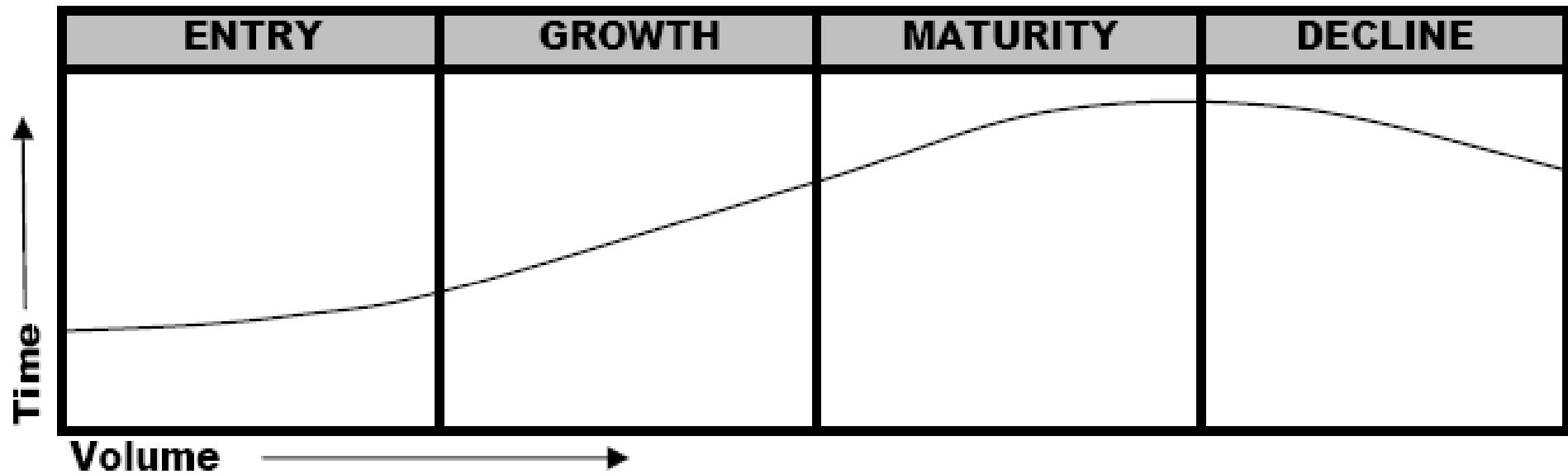


Define the Market



Market Trends

- Projected Volume
- Life Cycle?

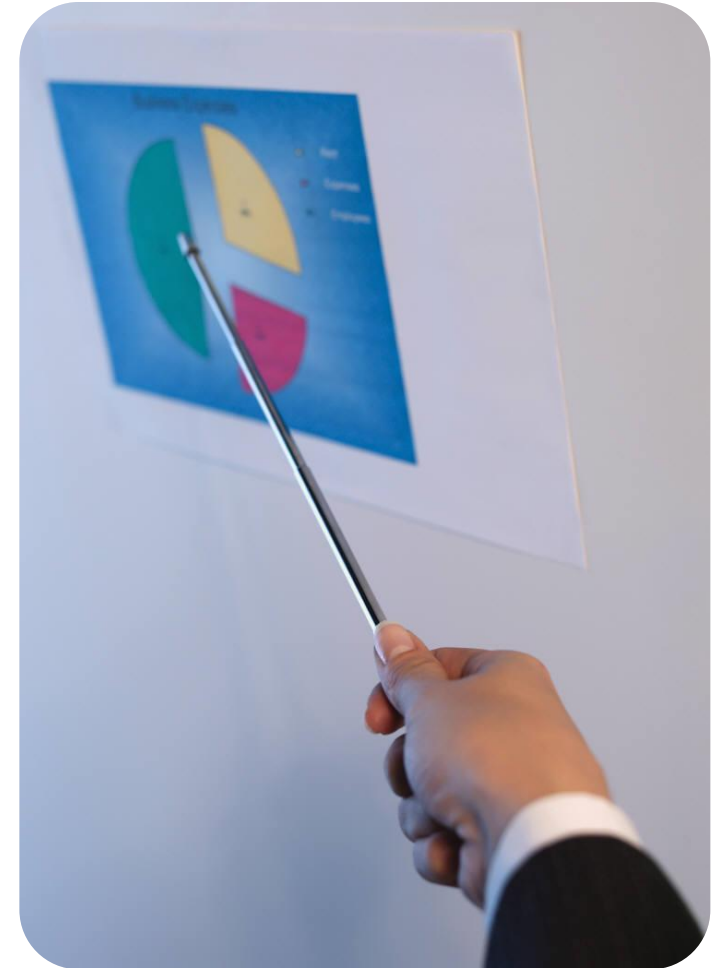


Data Drives Strategy

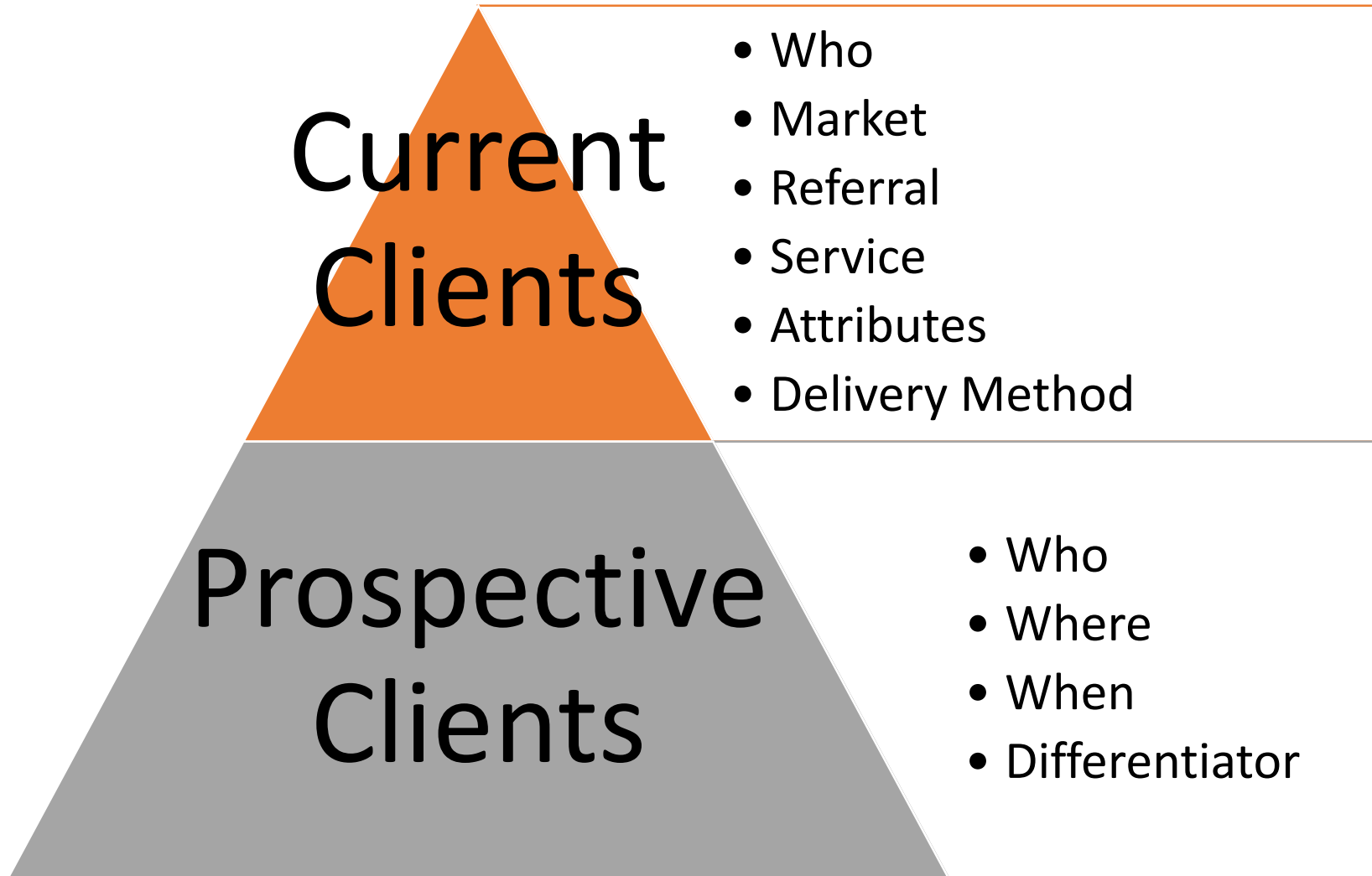


Performance and Experience Record

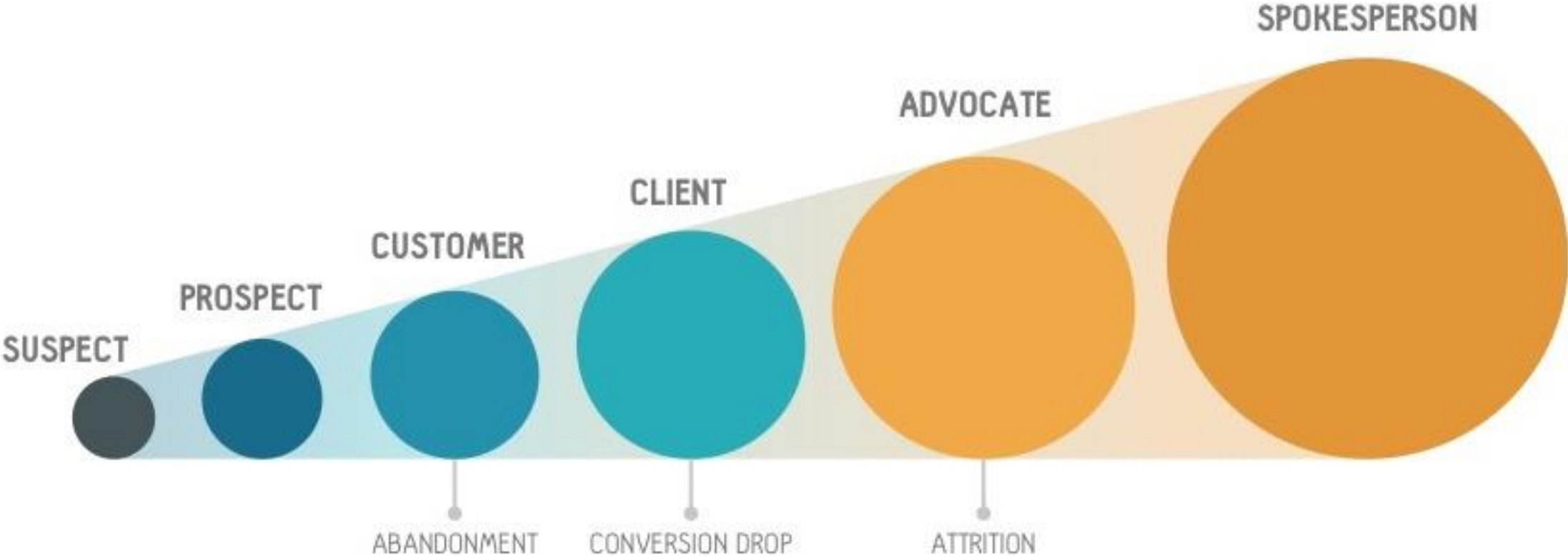
- # of Projects
- % of Billings/% of Profits
- Win Rate
- Performance
- Amount of Repeat Work



Client Analysis

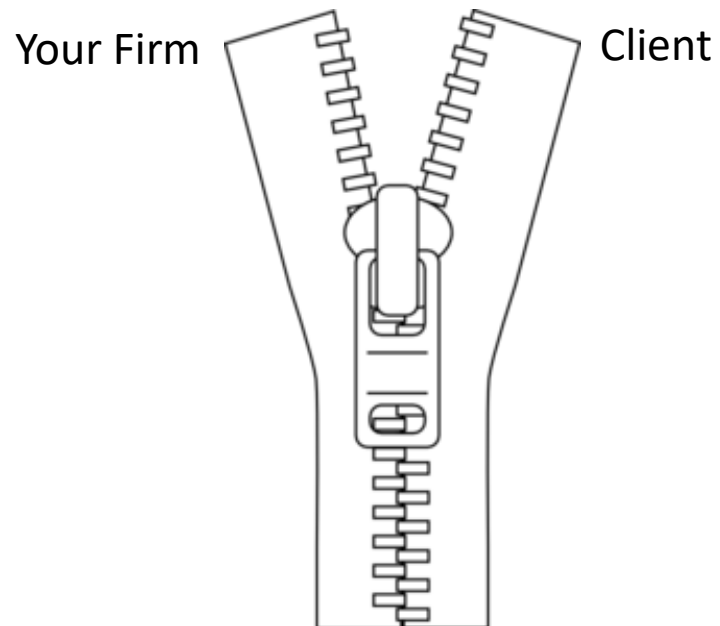


Client Retention Matters



Client Retention: Zipper Model

Client & Project Partner	Contacts	Role(s)	Plan
City of Nashville			
Arizona State University			
Hines			



Know Your Competition



Competitive Analysis

- What Other Firms Do This Work?
- What are Their Strengths & Weaknesses?
- How Do We Compare?
- What Competitive Benefit Do We Have?



Competitive Analysis

FACTOR	Your Firm	Strength	Weakness	Competitor A	Competitor B	Importance to Customer
Services						
Sales Activities						
Technology						
Award winning						
In-House services						
Associations						
Team						
Size of Work						
Market Sector						
Trade partners						
Marketing						
Website						

Making Order Out of Chaos



Goals, Objectives and Strategic Tactics

- Goal – broad statement of desire
- Objective – what you must do to achieve the goal
- Strategic Tactic – what/how to do it
- MUST have a who (name) and when (date)



Goals, Objectives and Strategic Tactics



The Tangibles



Business Development

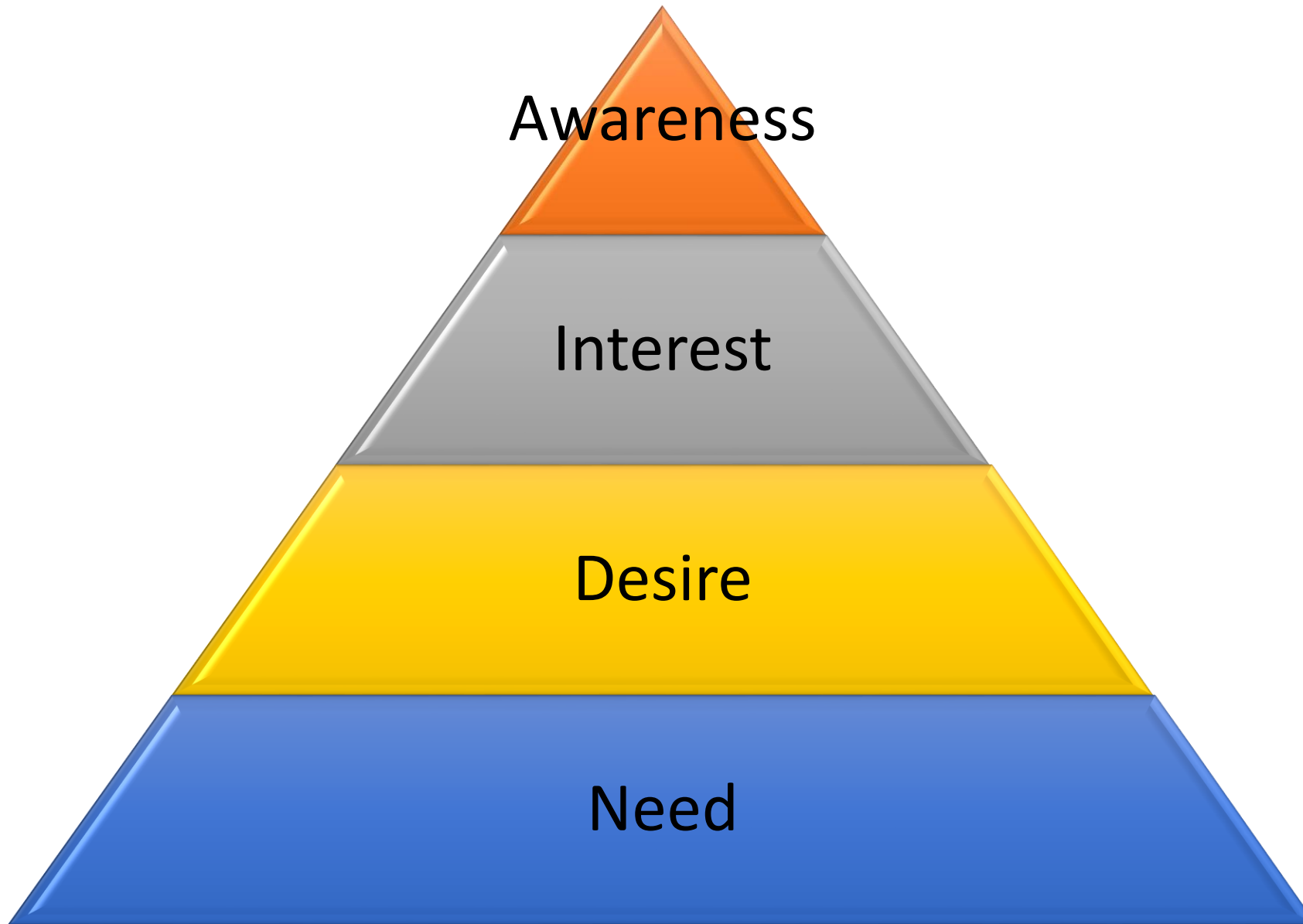
- Client Retention
- Client Attraction
- Activities include:
 - Associations
 - Sponsorships
 - Entertainment
 - CRM
 - Trend Research and Conferences



Marketing Influencers



4 Levels of Marketing Activities



Marketing Calendar

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	COMMENTS
Online Advertising, Social Media								■					Beginning in Aug 2016
Eblasts/Website										■			Begin website before new year
Printed Collateral	■												
BD Meetings, Lunch & Learns									■				Begin in fall before holidays
Interactive brochure									■				Recommend interactive piece to accompany BD efforts
Association/Networking											■		Begin budgeting and applying for associations in Fall for 2017
Sponsorships													
Advertising in publications	■												Anniversary campaign to begin in 2017
Client Retention Activities											■		Activity/gift before end of year
Press Releases/Awards/Lists	■												Set goal to begin this process in new year

What Does It Cost?



Budget

3 Approaches:

- Percentage Method
 - % of Revenue
- Historic Method
 - Based on year previous
- Goal based Method
 - Most comprehensive and realistic
 - Each item in the plan has a cost



Budget

- Benefits of having a Budget?
 - Accountability
 - Justify Expenses
 - Expenditures are well-thought out
 - Measurable success



Budget

- What Standard Items Go Into a Budget?
 - Labor
 - Collateral
 - Associations/conventions
 - Entertainment
 - Research
 - Interviews
 - Ads
 - PR
 - Awards
 - Subscriptions
 - Video/photography
- Goal-Based Additions to the Budget:
 - Goals and Tactics costs
 - Resources identified to achieve goals



Evaluation Criteria

- Identified Opportunities
- Number of Wins
- New Clients
- Volume Increase
- Increased Perception/Awareness



Summary



Questions



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