

**MARKETING PLANNING**

# **FLEXIBILITY MEETS RESULTS**

**IDA CHEINMAN, SUBSTANCE151**



“ **THE ONLY CONSTANT IN  
LIFE IS CHANGE.**

**HERACLITUS**

c.500 BC

**NOT SINCE THE ADVENT OF THE  
INTERNET HAS TECHNOLOGY  
FORCED US TO RETHINK HOW WE  
WIN, SERVE & RETAIN CUSTOMERS.**

Source: Forrester

ag·ile

/ajəl/

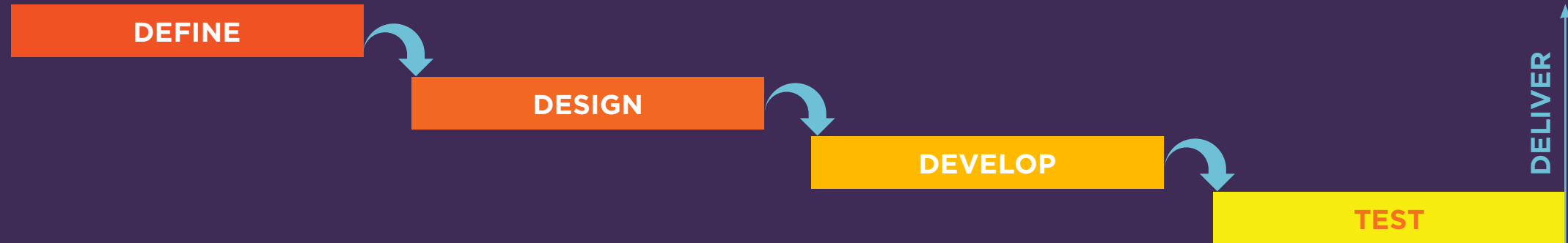
*adjective*

Ag·ile

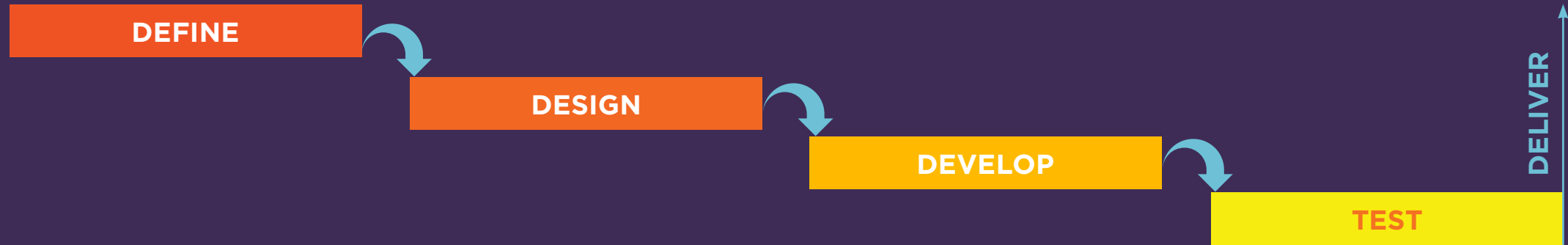
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*a methodology*

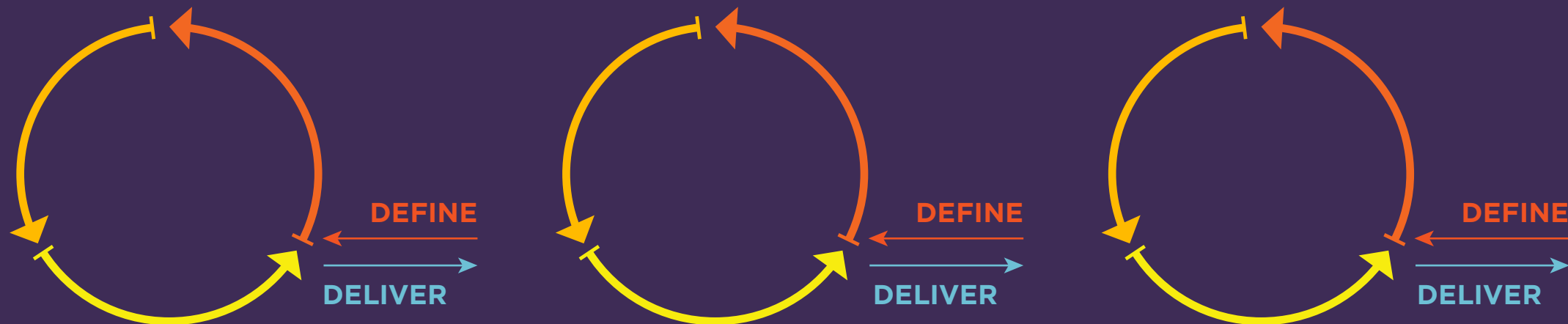
# WATERFALL



# WATERFALL



# AGILE



## AGILE MARKETING VALUES

**Validated** Learning

Customer-Focused **Collaboration**

**Adaptive** and **Iterative** Campaigns

**Customer** Discovery

**Flexible**

Responding to **Change**

Many Small **Experiments**



Opinions and Conventions

Silos and Hierarchy

Big-Bang Campaigns

Static Prediction

Rigid Planning

Following a Plan

A Few Large Bets

# YOUR MARKETING PLAN MUST ALIGN TO YOUR FIRM'S BUSINESS GOALS

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- + Get clear on business objectives
- + Agree on success metrics
- + Allocate budget and resources



# CUSTOMER- AND DATA-DRIVEN PLANNING

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- + Customer research: audience personas and journeys
- + Brand and MarCom audits
- + Competitive analysis

<b>CRITERIA</b>	<b>YOU</b>	<b>FIRM 1</b>	<b>FIRM 2</b>	<b>FIRM 3</b>
Size/Revenue				
Geography/Offices				
Industry/Market Focus				
Top Clients				
Strengths/Weaknesses				
Positioning				
Key Messages				
Brand				
Clients Say...				

**“ IN A WORLD OF RAPIDLY CHANGING  
CUSTOMER AND MARKET DEMANDS  
ACCELERATED BY DIGITAL, AGILE HELPS  
TEAMS KEEP PACE.**

**PWC**

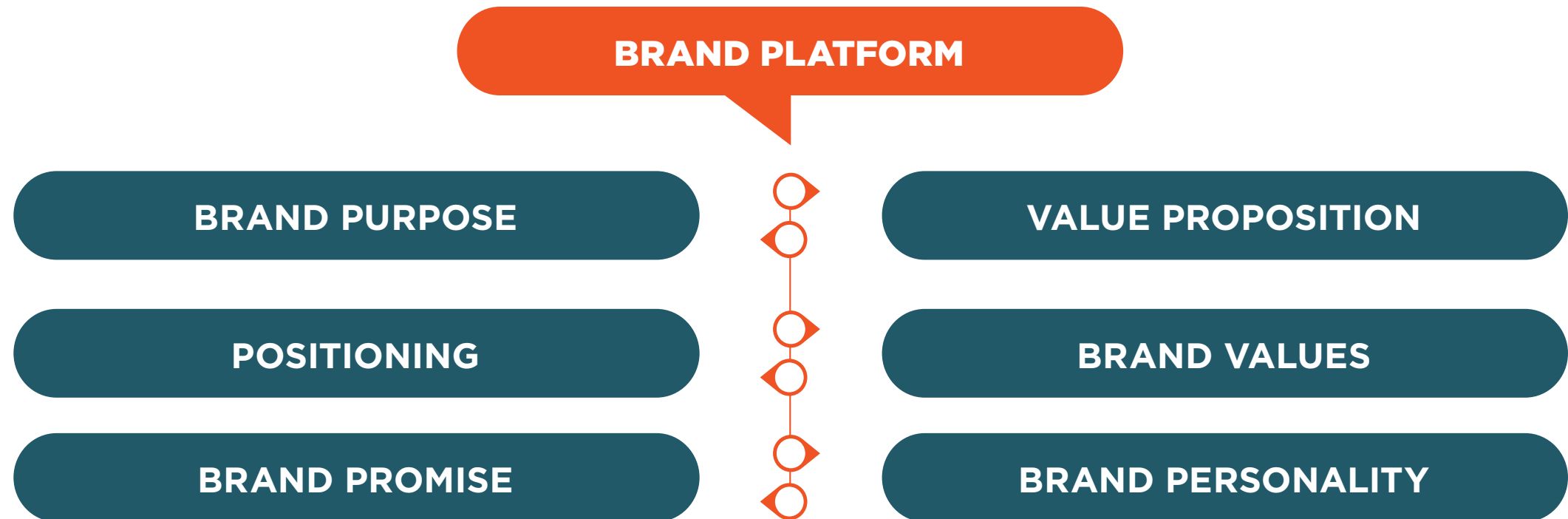
“Marketing at the Speed of Agile: A CMO's guide”

## WHAT DO WE NEED TO ACCOMPLISH?

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1. Strengthen the brand
2. Increase visibility
3. Generate engagement
4. Attract leads
5. Convert leads

# 1. STRENGTHEN THE BRAND



**BEHAVIOR**

**PERCEPTIONS**

**PERFORMANCE**

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**BEHAVIOR**

## PERCEPTIONS

## PERFORMANCE

- + Employees' ability to accurately articulate the firm's brand
- + Consistent evidence of values-based, on-brand behaviors
- + Employees' active participation in social sharing
- + Public advocacy
- + New hire referrals
- + Client satisfaction or complaints

**BEHAVIOR****PERCEPTIONS****PERFORMANCE**

## Awareness KPIs

- + Recognition
- + Recall
- + Traffic
- + Community size
- + Reach
- + Impressions

## Consideration KPIs

- + Differentiation
- + Relevance
- + Esteem
- + Perceived quality
- + Purchase intent



**BEHAVIOR****PERCEPTIONS****PERFORMANCE****Purchase KPIs**

- + Leads
- + Sales
- + Close ratio
- + Preference
- + Price premium

**Loyalty KPIs**

- + Satisfaction
- + Repeat purchase
- + Referrals
- + Retention
- + Customer lifetime value (CLV)

**Financial KPIs**

- + Market share
- + Revenue
- + Profitability
- + Cost per acquisition
- + Brand valuation

## **2. INCREASE VISIBILITY**

**IS YOUR FIRM BEING FOUND BY ITS  
IDEAL CLIENTS?**

### **3. ENGAGEMENT**

**YOUR AUDIENCES KNOW ABOUT YOU,  
BUT ARE THEY ENGAGED WITH YOU?**

## **4. LEAD GENERATION**

**YOUR AUDIENCES ARE ENGAGED, BUT  
ARE THEY BECOMING LEADS?**

## **5. LEAD CONVERSION**

**WE'RE CONSISTENTLY GENERATING  
LEADS, BUT ARE WE SUCCESSFUL  
AT CONVERTING THOSE LEADS INTO  
CUSTOMERS?**

## HAVE WE ACCOMPLISHED OUR GOALS?

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1. Strengthen the brand
2. Increase visibility
3. Generate engagement
4. Attract leads
5. Convert leads

# WITHOUT EXECUTION, THERE IS NO STRATEGY

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1. Break it down into quarterly and monthly goals
2. Decide what to stop doing
3. Determine what skills you need to execute successfully
4. Allocate adequate resources to execute for results

## PLAN WITH THE REALITIES OF EXECUTION IN MIND

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**DEFINE WHAT NEEDS TO HAPPEN IN  
THE NEXT 12 MONTHS AND **BREAK IT  
DOWN** INTO QUARTERLY & MONTHLY  
GOALS.**



**PLAN WITH THE REALITIES OF EXECUTION IN MIND**

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**DECIDE WHAT TO STOP DOING.**

## PLAN WITH THE REALITIES OF EXECUTION IN MIND

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**DOES YOUR TEAM HAVE THE SKILLS  
TO EXECUTE FOR RESULTS?**

## PLAN WITH THE REALITIES OF EXECUTION IN MIND

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**DOES YOUR TEAM HAVE RESOURCES  
TO EXECUTE FOR RESULTS?**



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**ADDITIONAL RESOURCES**

**HTTPS://BIT.LY/3M25IUQ**