

MARKETING PLANNING 2025

FLEXIBILITY MEETS RESULTS

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“ **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 AND RETAIN CUSTOMERS.

FORRESTER

ag·ile

/ajəl/

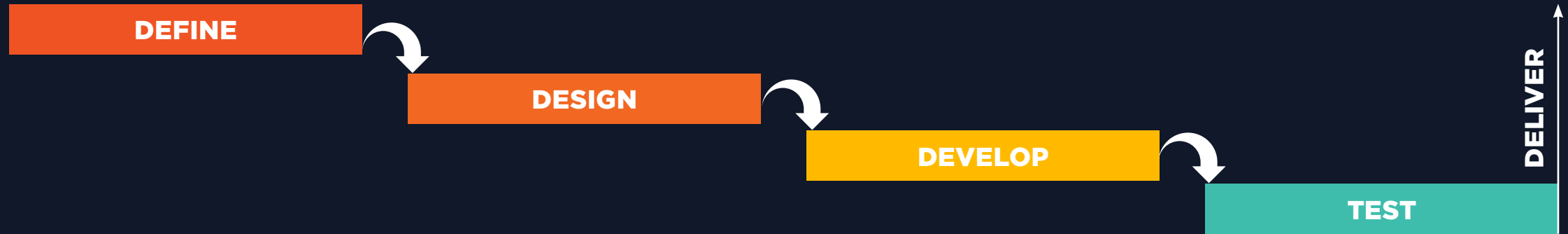
adjective

Ag·ile

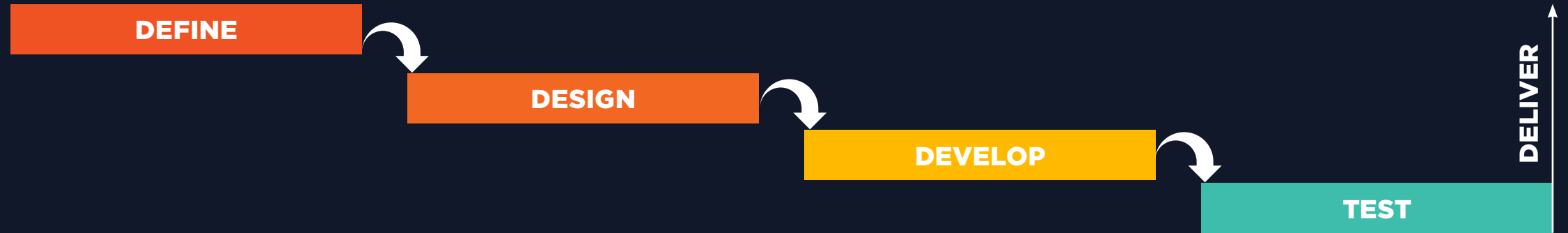
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a methodology

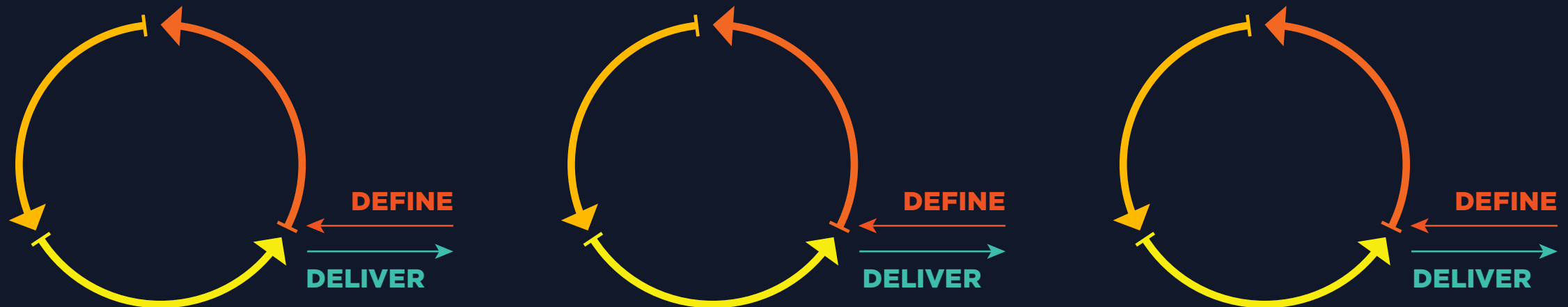
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WATERFALL



AGILE





Agile
Marketing
Manifesto

We are discovering better ways of creating value for our customers and for our organizations through new approaches to marketing.

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 FIRM'S MARKETING PLAN MUST ALIGN TO ITS BUSINESS GOALS

- 1 Get clear on business objectives
- 2 Agree on success metrics
- 3 Allocate budget and resources

CMOS' SPENDING POWER

75%

**OF SENIOR MARKETERS REPORTED
BEING ASKED TO DO MORE WITH LESS**

71%

**CMOS SAID THEY LACK SUFFICIENT
BUDGET TO FULLY EXECUTE THEIR
STRATEGY**

Source: Gartner 2023 CMO Spend and Strategy Survey

HOW TO DO MORE WITH LESS

- 1 Re-prioritize
- 2 Choose quality over quantity
- 3 Do more of what works and less of what doesn't

1

WHY

2

WHAT

3

WHO

4

HOW

5

WHEN

CUSTOMER- AND DATA-DRIVEN PLANNING

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

CANDIDATE AND EMPLOYEE MARKETING FUNNEL



CRITERIA	YOUR FIRM	FIRM 1	FIRM 2	FIRM 3
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.

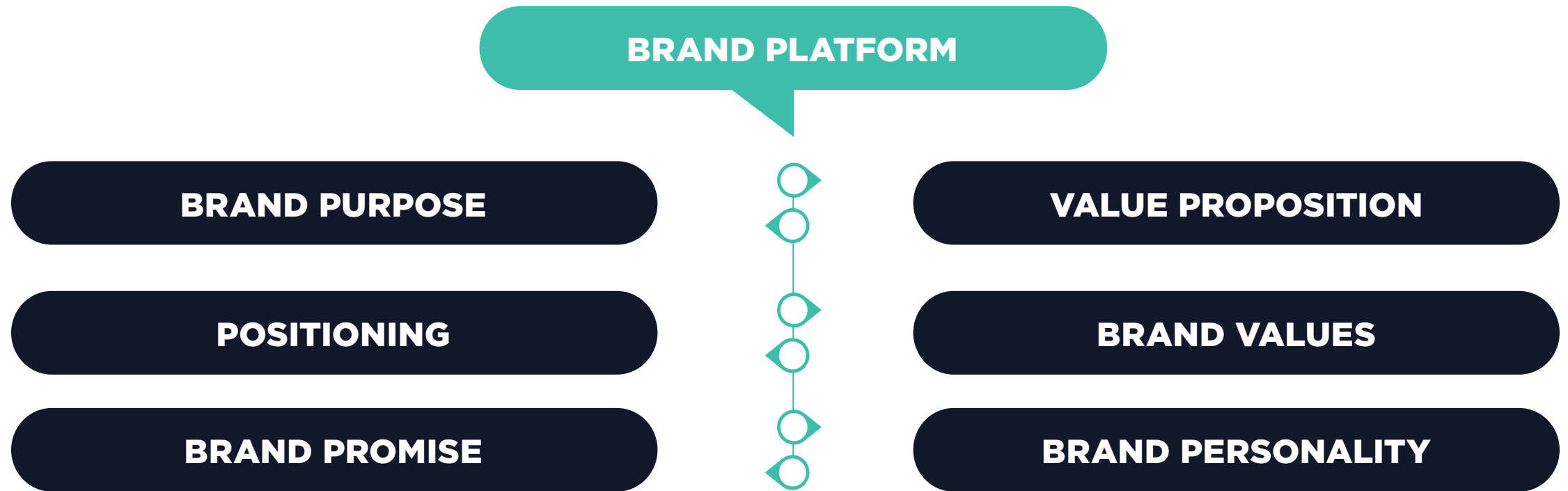
PWC

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

WHAT DO WE NEED TO ACCOMPLISH?

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

1. STRENGTHEN THE BRAND





**BRAND
BEHAVIOR**



**BRAND
PERCEPTION**



**BRAND
PERFORMANCE**

BRAND BEHAVIOR: WHAT TO MEASURE

- + Employees' ability to accurately articulate the firm's brand
- + Consistent evidence of values-based, on-brand behaviors
- + Employees' active participation in content creation and social sharing
- + New hire referrals
- + Customer satisfaction/complaints

BRAND PERCEPTION: WHAT TO MEASURE

1. REPUTATION

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

2. PREFERENCE

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

BRAND PERFORMANCE: WHAT TO MEASURE

1. PURCHASE KPIS

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

2. LOYALTY KPIS

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

3. 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?

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

WITHOUT EXECUTION, THERE IS NO STRATEGY

- 1 Break it down into quarterly and monthly goals
- 2 Decide what to stop doing
- 3 Do you have the skills to execute successfully?
- 4 Do you have the resources to execute for results?

PLAN WITH THE REALITIES OF EXECUTION IN MIND

**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

DECIDE WHAT TO STOP DOING.

PLAN WITH THE REALITIES OF EXECUTION IN MIND

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

PLAN WITH THE REALITIES OF EXECUTION IN MIND

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



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QUESTIONS?



SLIDES AND RESOURCES

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