

Marketing Plans

Lisa Neary

CULTIVATION  LLC



me

- 25+ years in marketing and advertising
 - Agency-side and client-side
 - Both start-ups and Fortune 500 (Target, Medtronic)
 - Lots of different industries
 - For-profit and non-profit (Hazelden)
- Started **Cultivation** 3 years ago
 - Branding, marketing strategy, market research, communications consulting
 - Both traditional and digital
 - Strong focus on healthcare, med device and health insurance
 - Focused on **brand differentiation for growth**
 - **www.cultivationco.com**



With deep roots in medical and healthcare, Cultivation provides customer insights and smart marketing that helps business thrive.



It all starts with a seed — the good idea. The proper care, tending and nourishment can make it grow into something amazing. Creative, highly strategic marketing is often the difference between a company that withers and one that flourishes.

I started Cultivation to help your company grow. **Cultivation is a contract marketing company specializing in medical device, healthcare and health insurance spaces that provides clients with imaginative brand marketing driven by smart customer insights.**



With 25 years of experience at best-in-class companies in a wide range of industries, a strong design aesthetic, and superb communication skills, I leverage decades of know-how to help your company reach your target audience with the right message, while standing out from the competition. I have a passion for gleaning customer insight and leveraging that for building strong business differentiation. Let's work together to grow something great!

— **Lisa Neary**, Founder of Cultivation

Client: Play From Scratch Toys

Here's a shout-out to one of my first clients. They're off and running!



SERVICES: The client hired me to conduct primary research for this start-up company, which will likely sell in both specialty retail and internet channels. My services included online survey design, discussion guide, focus group facilitation, and analysis of business implications and sales channel options.

The Challenge

A smart, savvy professional had an idea of launching a line of toys that encouraged creative, intelligent, "open" play. His idea would be a break from today's plastic toys that left little to the imagination. In preparation for the planned Fall 2012 launch, he needed to better understand his target audience, and how they selected toys for their kids. The stakes were high, given the weak economy, huge competitive noise in the toy space, and a relatively complex back story that would set his product line apart from the rest.

The Solution I provided

I conceptualized, designed and facilitated focus groups to better understand the buying motivations and preferences of his target audience---moms with kids between 3 and 10. As part of this project, I:

1. **Designed the discussion guide** to specifically answer the key questions that would impact sales, marketing and product development activities.
2. **Recruited people** within the Twin Cities market that represented a cross-section of the target demographic.
3. **Wrote, deployed and analyzed the results of an online survey** sent to participants prior to the focus groups. These surveys gathered, confidentially, information such as household income, spending habits and employment status of the participants.
4. **Facilitated the discussion** to flesh out implicit and explicit needs and desires related to buying kids' toys. Asked open-ended questions that helped us better understand what features the target audience most (and least) valued when buying toys for their kids. We also got specific feedback from the group on current prototypes, branding and logos that directly and immediately had impact on design strategy.
5. **Wrote a full report** summarizing what was learned, along with key implications on go-to-market strategy. I also presented these findings to the Board of Directors.

Complexity and speed

THEN

- Print (newspaper, magazine, direct mail, etc.)
- Broadcast (TV and radio)
- Outdoor (billboards)



NOW

- **Web** (websites, banner ads, email, SEO, etc.)
- Mobile (apps, QR, etc.)
- Social (Facebook, Twitter, Yelp, etc.)
- Product placement/ PR
- Print (newspaper, magazine, direct mail, etc.)
- Broadcast (TV and radio, cable, YouTube, etc.)
- Outdoor (billboards)



What's a marketing plan?

Think of your business growth as being like a **road trip**. The marketing plan is the map (or **GPS**) for your business to follow.

- Where are we now? (brand audit, competitive analysis)
- Where do we want to go? (goals and objectives)
- How will we get there? (strategies and tactics)
- Who is in our car? (the team)
- What kind of car will we drive? (brand)
- How bad is the traffic along the way? (SWOT analysis)
- What will the trip cost? (budget)
- How will we know we've arrived? (metrics)
- Where will we go next? (Strategic planning)



Why is it important to have a marketing plan?

- The process of creating the plan is challenging and fruitful, gets people to think strategically together
- It's good discipline to periodically step back, get out of the weeds and do high-level thinking about your business
- Ensures a consistent shared vision, “marching orders,” the “operating instructions” for your company
- Focuses finite resources on activities with the highest ROI
- Provides important structure and guidance throughout the period (i.e. year)
- Captures your strategic thinking for posterity
- Gives you something to measure against



the basics

1. Who are we? (brand)

- Name
- Tagline
- Value proposition
- Visual identity (logo, look and feel)
- Voice

2. What do we do better than anyone else on the planet?

- Unmet needs
- Differentiation
- Competitive advantage

3. Who is our key customer?

- What are the pain points that we will solve for them?
- How do we reach them?
- What messaging will best resonate?





Your marketing plan:

- is simply meant to spur and capture the high-level strategic thinking
- will guide activities throughout the period, and serve as a benchmark against which to measure
- doesn't have to be long and fancy

an example...

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Company X enjoys a healthy and steady revenue base, the majority coming from a small number of clients. Though organic growth from the existing clientele is expected, there is recognition that diversifying the client list by moving into different market segments is a smart business strategy.

Among our clientele, we enjoy an excellent reputation for being smart, knowledgeable and an invaluable partner. However, there is an extremely low level of awareness in this market that **Company X** even has an office in CityY and about what we do.

Raising our profile and “spreading the word” of our capabilities to the many “blue chip” companies headquartered in CityY is the first step toward growing and diversifying our business portfolio.

80% of decision makers say they found the vendor, not the other way around

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Who we are. What we do.

We design, build and execute on-brand and highly effective digital strategies to help companies connect with their customers online and grow their business.

We make it easy for our clients' customers to do business with them online. Our deep expertise in software development and backend integration to complex systems make us trusted partners to our clients' IT organizations. We've worked for years with clients on ensuring secure and accurate data transfer between disparate systems.

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What sets us apart from the rest?

Company X has been working in Web since long before it was cool. The local office is regarded as a digital center of excellence for the Corporation, one of the largest advertising and marketing networks in the world.

Our 50+ digital experts are laser-focused on designing, building and managing best-in-class web strategy. For nearly two decades, our office has worked with clients to provide highly strategic, smart, tailored digital solutions that solve business problems. Our forté is developing digital strategies that streamline business operations and provide superb user experiences. Our ability to leverage the right technology to be agile and responsive to complex business needs sets us apart from other agencies who just “build pretty websites.”

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Our ideal customer

- Headquartered in the CityY metropolitan area
- Strong desire for incorporating digital/Web into their current and future marketing initiatives for business growth. Either has a current website that needs to be overhauled, or needs to build a web presence.
- Annual revenues of \$25 Million + (budget of \$200,000+)
- Doing business in the financial services, healthcare, travel or education segments

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General Goal

Grow and diversify **Company X's** client portfolio. Significantly elevate the awareness of **Company X** throughout the CityY business community (and possibly beyond) as the preeminent digital agency in the Midwest known for smart business strategy and flawless execution on even the most complex of projects.

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Specific goals

2011 Goal: Work on identity, brand and “filling the tool box”

Year 1 Goal (2012): Brand build and Network

- I. Meet with/present to digital decision makers in 30-40 companies in the CityYmetro.
- II. Pitch low-investment (i.e. \$10K-30K) “foot-in-door” projects such as assessments, competitive analyses, or preliminary strategy work. Aim to close 5-7 “investment projects” as a means of building portfolio and deepening contacts.

Year 2 Goal (2013): Build awareness, Network and Sell

- I. Follow-up on leads generated from Year 1 efforts.
- II. Meet with/present to digital decision makers in 50-60 companies in the CityYmetro.
- III. Pitch low-investment (i.e. \$10K-30K) “foot-in-door” projects such as assessments, competitive analyses, or preliminary strategy work. Aim to close 7-10 “investment projects” as a means of building portfolio and deepening contacts.
- IV. Aim to close 5-7 new client deals. Short-term focus should be on winning relevant project “showcase” work with high-profile client brands, and on covering costs.

Year 3 Goal (2014): Promote, Network and Sell

- I. Follow-up on leads generated from Year 2 efforts.
- II. Meet with/present to digital decision makers in 50 companies in CityYmetro.
- III. Aim to close 5-7 new client deals. Short-term focus should be on winning relevant project “showcase” work with high-profile client brands, with increasing focus on growing revenues.

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Strengths

- Seasoned, high-caliber talent with deep expertise in digital
- Strong focus on digital
- Excellent reputation for digital
- Expertise in health insurance, banking, and education segments
- Agile, ability to scale quickly
- Best-in-class Project Management methodology
- Highly respected for quality of execution
- **Company X** corporate brand

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Weaknesses

- Limited experience outside of core market segments
- Pricing perceived to be high
- Methodology can be hard to “scale down” for smaller projects
- Extremely low awareness in a competitive marketplace
- New business development (sales) is weak relative to competition

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Identity work:

Develop/refine the **Company X** “story,” elevator pitch, key value proposition, differentiators, and key messages. Includes determining our voice and our look.

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2 Improve our Web presence

Update and enhance **Company X**-specific content for corporate site. Develop refresh strategy.

TO DO

1. Replace the current people photos, which are hokey and unsophisticated
2. Evaluate who should be featured on the site
3. Review and update showcased work
4. Validate search items. (For example, when you search for Minneapolis under “people,” an Art Director from Hamburg Germany shows up)
5. Provide easy access to the **Company X** blog, Twitter, etc. once they are updated and ready

II. Leverage assets

1. Identity work (see above)
2. Staff bios (including photos)
3. Case studies (a library of 5-7 covering a variety of client and project types)

FACT: Among businesses looking for new agencies, 93% go to the agency's website first. It is critical that our site presents our brand character in a clear and compelling way.

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Marketing and promotional materials

Develop beautifully designed, distinctly branded documents that work together as a system.

▪ **Capabilities Presentation** (PowerPoint/Keynote): Develop a comprehensive and customizable presentation to show to prospective clients, showcasing **Company X's** expertise, approach, and strengths. *Note: Must be able to be easily loaded and run on iPad.*

▪ **Case Studies and testimonials**: Write business cases demonstrating how **Company X** developed smart digital solutions to address specific client challenges. Focus on Problem, Approach, Solution, and Results. *Note: Must be able to be easily loaded and run on iPad.*

▪ **Leave-behind Template**: Develop an attractive, professional and easy-to-use template as a companion document to the Capabilities presentation.

▪ **RFP Template and assets** (i.e. bios): Develop an attractive, professional and easy-to-use template that can be used in responding to RFPs.

▪ **Proposal Template and assets**: Develop an attractive, professional and easy-to-use template to build a high-quality proposal for clients.

▪ **Give-aways**: Low-cost, clever, useful items that reinforce **Company X's** unique selling message that can be given to prospective client to build awareness.

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Communications Plan

1. Update content on the **Company X** website, with new bio images and fresh marketing messages
2. Employee communications regarding key messages, for grass roots efforts
3. Local meetings and conference strategy, examples:
 - MIMA
 - Medical Alley
 - Twin Cities Business
 - Etc.
4. Outreach and networking plan
 - Identify target companies at which we have a strong connection
 - Determine phased contact plan
 - A highly targeted direct mail campaign consisting of a letter to C-level execs of select prospect companies introducing ourselves and paving the way for a subsequent meeting.

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TASK	DESCRIPTION	STATUS
Staff bios	New photos and bios of staff for use in proposals, pitches, promotion, etc.	12/7/11: Most bios have been written and approved. Most photos have been taken and are now posted on the JWT website. Reshoots for some are scheduled in the coming weeks.
Key messages	<p>Key messages for press releases and marketing materials.</p> <p>Key messages will also be provided to employees to aid in grass roots awareness efforts.</p>	<p>12/7/11: Key messages have been written for the capabilities presentation, done in consultation with key staff members.</p> <p>When/if Digitaria merger happen, messages will be updated.</p>
Sales attack plan (pipeline)	Database that captures a list of prospective companies, details about each including known contacts.	12/7/11: List has been developed. Scoring and prioritizing is next. Then strategizing on the specific pitch angles and setting up a “road show.”

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TASK	DESCRIPTION	STATUS
Website update	The presence on the corporate website has been weak and in need of updating for some time. Strategy will need to be determined on how to handle the presumed transition to Partner X on that site.	12/7/11: Website was updated in mid-November to include new case studies and graphics, new bios and photos, and Twitter feeds.
Marketing materials	Need to develop beautifully designed documents and templates to support sales and marketing efforts.	12/7/11: Capabilities presentation in final draft. Creatives are designing a collateral system.
Case studies	Build a library of diverse case studies to be used in marketing and sales efforts.	12/7/11: Four have been written and posted online. For one, we haven't gotten approval for online posting but we're planning to use in meetings.
Give-aways	Clever, low-cost, branded items that that be given away to clients and employees to create buzz and mindshare.	Pending

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SEGMENT	COMPANIES WHERE WE HAVE STRONG CONTACTS
Healthcare	Allina Hospitals and Clinics, Mayo Clinic
Retail	Best Buy, The Gap, Blue Stem Brands, Buffalo Wild Wings, Coolibar, Davisco Foods, Michaels Store, Room & Board, Schwanns, Sun Country Airlines, SuperValu, Swiss Colony, Target, Wrigley
Education	Capella, MN State Colleges & Universities
Industrial	Cargill, EcoLab, General Mills, Graco, HB Fuller, Honeywell, LexMark, Pentair, PepsiCo, 3M, Ziegler Caterpillar, Barr Engineering, Rimage
Financial	Bank of America, Chase, Citi, First National Bank of Omaha, Great Western Bank, Piper Jaffrey, US Bank, Allianz, Ameriprise
Medical	Medtronic, Boston Scientific, St. Jude Medical, Sightpath Medical, Web MD
Business Services	Deluxe Corporation, Merrill Corporation, Padilla Spear Beardsley, Towers Watson
Media	Conde Naste, Fox Sports Network North, Minnesota Public Radio, WCCO TV

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- 1. Reach out:** Staff member with the contact at the target company reaches out with the goal to **(1)** find out who the key decisions makers are on digital projects, if not the contact and **(2)** set-up a meeting with the decision maker(s) to introduce ourselves
- 2. Learn more:** Prelim phone call between staff member (and others) and contact to learn more about needs and challenges the company may need help with.
- 3. Get smart:** Prep meeting consisting of Strategy, Account and New Biz (and others) where there is a de-brief on what is known about the company, their industry, their key challenges, and their digital properties and initiatives. Brainstorming session on possible strategic angles or key questions prior to the meeting.
- 4. Share ideas:** Small group (2-4 people) attend the get-to-know meeting with the contact and other decision makers. Capabilities conversation can include current marketing collateral, as appropriate (i.e. videos, case studies, etc.) Clear next steps to be defined at meeting's conclusion.
- 5. Track:** Details of meeting and next steps is logged into CRM system (i.e. Salesforce, etc.)
- 6. Follow-up:** Thank you letter couriered to prospect along with follow-up package including full capabilities deck, promotional materials, give-away, etc.
- 7. Loop back:** Periodic follow-up calls/emails to be made, as appropriate.

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Playbook (DETAILS)

- 1. REACH OUT:** Staff member with the contact at the target company reaches out with the goal to **(1)** find out who the key decisions makers are on digital projects, if not the contact and **(2)** set-up a meeting with the decision maker(s) to introduce ourselves
 - **Action:** Ask about what they know about their company's current, future or planned digital marketing initiatives. Document.
 - **Action:** Determine if they are a decision maker and, if not, find out who is. Document.
 - **Talking point #1:** As I think you're aware, **Company X** is one of the largest and oldest companies in the world in the tech space.
 - **Talking point #2:** in the past few months, our agency had undergone some really exciting changes. We've been flying under the radar for a few years now---in fact, I think most companies in Minneapolis don't even know **Company X** has an office here.
 - **Talking point #3 :** Can you help me set up a 45 minute meeting where we can come in, introduce ourselves to the right group of people, and share the ideas we have for how we can help you grow your business with digital strategies? Is there someone else you can help connect me with to make that happen?

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Oct-Nov
2014



Focus on tasks that are needed regardless of what happens with Partner X merger

- Marketing plan
- Develop case studies
- Write employee bios
- Complete Phase 1 of staff photos
- Draft Target Company List

Nov/Dec
2014



Presumed merger with Partner X is announced

- Formal communication to current clients
- Joint press releases
- Employee event
- Key messages provided to employees
- Target Company List is refined. Conduct brainstorming on key prospects. Set up meetings.

Jan
2015



New business development effort kicks off in earnest.

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TBD

another example...

Company X 2014-2015 Marketing Activities Calendar



	Q4 FY14				Q1 FY15			Q2 FY15			Q3 FY15			Q4 FY15		
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
Industry events			ACC March 29-31		HRS 5/7-10			ESC Congress, Barcelona August 30-Sept 3			AHA Nov 15-19					ACC April 30-May 2
Milestones	AF Symp 1/9-11															
Press Releases	1/6/14 VICTORY AF CryoFirst (TBD)															
Week 1		Get SNAPCOMM UP	Town Hall follow-up memo with video link		Finalize/Send Fiscal Year wrap-up memo Leadership TOOK KIT	Town Hall follow-up memo with video link		Leadership TOOK KIT			Leadership TOOK KIT			Leadership TOOK KIT		
Week 2	AF Symp 1/9-11 New Year RG memo	Town Hall prep		DRAFT Fiscal Year wrap-up memo	HRS Town Hall prep			Town Hall prep				Draft holiday letter				
Week 3	Get SNAPCOMM UP	Finalize Town Hall		Prep for AFS Ext. Leadership Meeting	Finalize Town Hall		Prep for AFS Ext. Leadership Meeting	Finalize Town Hall		Prep for AFS Ext. Leadership Meeting		Send out Holiday Letter 12/18 or 12/19	Prep for AFS Ext. Leadership Meeting			Prep for AFS Ext. Leadership Meeting
Week 4	Get SNAPCOMM UP	Town Hall 2/19		AFS Ext. Leadership Team (tent)	Town Hall 5/22		AFS Ext. Leadership Team (tent)	Town Hall (tent)		AFS Ext. Leadership Team (tent)	Town Hall (tent)	Christmas	AFS Ext. Leadership Team (tent)	Town Hall (tent)		AFS Ext. Leadership Team (tent)
Week 5								Town Hall follow-up memo with video link			Town Hall follow-up memo with video link					

the game plan

1. **Conduct market research** to flesh out specific pain points and needs (even language/lingo) of the target audience. (Your customer will give you great answers if you ask the right questions.)
2. **Identify your real competitive advantages** and points of differentiation to define/refine your value prop
3. **Choose** which customer segment(s) you will focus time, energy and money on.
4. Determine, then manage the **marketing mix**
 1. What (product/service offering, key messages, pricing, etc.)
 2. When (timing, seasonality)
 3. Where (media/advertising/promotion/SEO plan)
 4. How (budget, channel strategy, measuring/metrics)



What matters

- A compelling offer that solves a problem
- A good brand story
- Strategy informed (or validated) by market research
- Clear and succinct messaging that resonates
- A strongly differentiated brand
 - Value prop
 - Smart use of language/voice
 - Beautiful/clean design
- Correct placement, strategic repetition
- Avoiding/rejecting hype



next steps

1. **Determine where you're going** (short-term and long-term goals, specific and measurable)
2. **Ensure your brand is in good shape** (well defined brand architecture including value prop and key messaging)
3. **Get even smarter** through market research
4. **Capture your strategic thinking** in a marketing plan. Free templates are available online.
5. **Validate the plan** with and get buy-in from leadership team
6. **Execute on the plan**, measure results and compare against goals
7. **Do it all again** next year



thank you!

CULTIVATION  LLC
Marketing and brand savvy to help business thrive

