

# Preparing to Plan: Advance Prep to Build a Better Marketing Plan

Society for Marketing Professional Services  
2019 Southern Regional Conference

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Knock  
Knock

Vicki R. McCullough



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Who's  
Here?



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## Strong Foundation



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## Why Advance Prep?

- Use time efficiently
- Minimize surprises
- Engage others in a positive way
- Increase buy in
- Generate a more productive plan

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## Target: Stellar Marketing Plan

- Research, goal setting, schedules, and metrics
- Aligned goals
- Specific activities for a specific period of time
- Dynamic document

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Strong Team



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Planning Team: Play Nice!

- Leave behind office politics, gossip
- Offer and listen to differing opinions
- Understand the process, time involved, and responsibilities
- Participate actively

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Planning Team: Roles

- Marketing lead/expert
- Executive decision-maker
- SMEs from industry verticals
- Recorder/note taker
- Facilitator

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Planning  
Team:  
Commitment

- Definition and purpose
- Time frame
- Deliverable: Marketing Plan
- Play nice!
- Commitment/Signatures

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Planning  
Team:  
Resources

- Other marketing staff
- Business Development staff
- CFO, controller, bookkeeper
- Prof staff who "get" marketing
- SMPS marketing peers
- Consultants

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Planning  
Team:  
What  
About...?

- Rainmaker
- Supporter
- Dissenter
- Self-appointed expert

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## Strong Process



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## Supporting Materials

- Identify materials to gather
- What if items are missing?
- How to use the materials

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## Planning Process & Timeframe

- Review firm history and current status
- Identify specific goals, objectives, and success metrics
- Map activities, including reviews, to a calendar
- Obtain approval for the plan
- Make it work/Get 'er done!

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Create  
Long-term  
Success

- Invest in advance prep
- Define specific goals, objectives, metrics
- Stick to calendar and deadlines
- Commit to regular reviews and reporting
- Revise/update as needed

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Thanks!



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Thanks!

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