Creating a Strategic Marketing and Communications Plan

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Creating a Strategic Marketing Plan

This marketing plan template is designed to facilitate analysis, planning and communication of your strategic marketing and communications plan. Additional resources and worksheets are references throughout the document to assist with more detailed planning in specific areas.

Before writing your plan, determine the time-frame for your plan. Is this a three-year plan, a five-year plan, etc? Regardless of the time frame, the plan should be reviewed and updated yearly as needed.

Step I: Establish a Marketing Planning Committee

The first step before beginning work on your marketing plan is to establish a marketing committee that will oversee the marketing plan development process. Developing a marketing plan shouldn't be done in a vacuum. Everyone is your college, department or unit is a spokesperson for your brand, so varied perspectives and voices should be involved in developing your overarching communication plan.

We suggest developing a committee comprised of the following members:

> Dean and Leadership
> College/Department or Unit Director of Communications
> University Communications Marketing Representative
> University Communications Public Relations Liaison
> College/Department Admissions Representative (if you are associated with a college or department)
> Faculty member(s)
> Director of Development

Committee Purpose and Charge: This committee should meet at least once per semester. The purpose of this committee is to discuss major issues related to marketing and communications for your college/department or unit. This committee is a sounding board for the overarching direction for your marketing needs.

Step 2: Establish a Marketing Plan Work Group

The Marketing Planning Committee will provide direction and oversight for the strategic marketing plan, but the reality is that writing a marketing plan is a nuts and bolts process which needs a core Marketing Plan Work Group to see its completion.

You'll want to establish a small group to actually write the marketing plan which will be shared with the Marketing Planning Committee.

Your small work plan group should consist of:

> College/Department or Unit Director of Communications
> University Communications Marketing Representative

University Communications Public Relations Liaison
Someone in your college/department or unit who is passionate about communication and marketing (optional)

This team should meet at least monthly during the marketing plan development process. Meetings may need to be more or less frequent depending on where your group is in the planning and writing process for your strategic marketing plan.

Step 3: Writing the Plan

Writing a marketing plan can seem like a daunting task, but it's really just the process of codifying and prioritizing all your marketing ideas into a single, overarching document that serves as a communications road map for your college, department or unit. Your marketing planning committee's ideas will help shape the document and your small marketing work group will do the heavy lifting of compiling the ideas.

All marketing plans should directly support your college department or unit's strategic plan. The marketing plan outlines how communication strategies will support and enhance strategic plan goals. If your group does not have a strategic plan, the University's strategic plan can be used the anchor for your communications priorities.

Outlined below is a suggested structure for your marketing plan. You'll also find supporting documentation and descriptions for each element.

A. Executive Summary

The first part of your marketing plan should actually be written last. Once you've written your marketing plan, you'll want to provide a 30-thousand-foot overview of the plan for those who just want the highlights.

B. Situational Analysis/Research

The Situational Analysis is a chance for your college, department or unit to reflect on the current internal and external environment relating to your organization. The Situational Analysis is an analysis. It uses data, research, trends and observations to assess the current state of things within your college, department or unit. The Situational Analysis does not have to relate to communications specifically. It should describe the overarching state-of-things so that everyone understands the challenges and opportunities your organization is facing.

A Situational Analysis can be as simple as a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, or it can be more in depth and provide additional data. At a minimum, University Communications suggests completing a SWOT exercise with your Marketing Planning Committee and including it in the Situational Analysis. Other elements you might include in a Situational Analysis:

Historical narrative
SWOT analysis (See SWOT Analysis Tips and SWOT Analysis Template worksheets)

Competitive set analysis
Secondary NC State research - Admissions, Alumni surveys
Secondary trade/industry research
Primary market research - Awareness, market testing, focus groups

C. Audience Analysis (See Audience Analysis worksheet)

One of the most critical components of any marketing plan is narrowing your target audiences. Often communicators will assume their target audience is "EVERYONE," but unless you have a $4 billion dollar marketing budget or are Coca-Cola, it's unrealistic to think that your messaging is for everyone. Segmentation of your audience and messaging improves the effectiveness and penetration of your message.

They key to a quality marketing plan is determining your most important and influential audiences to meet your marketing objectives. Encourage your marketing planning committee to brainstorm potential audiences. After your initial brainstorm, you'll want to prioritize audiences. Having 50 potential audiences makes for a challenging and expensive communications strategy. Try to put your audiences into buckets of primary, secondary and other. This will help you to prioritize and target your messaging.

For each audience selected as a target, provide some background information and characteristics. What does this target look like? What are their interests? How do they consume information? What are their perceptions of our college/department or unit?

Primary Audience Tier 1 (Must have their support and ear.)	Secondary Audience Tier 2 (Important, but no primary)	Other Tier 3 (Nice to have)
Alumni Donors Students	Faculty	

Primary Audience(s)

Audience Description	Desired Behaviors	Current Mindset / Routine	Barriers	Where they Access Information
Primary Audience 1				
Primary Audience 2				

Secondary Audience(s)

Audience Description	Desired Behaviors	Current Mindset / Routine	Barriers	Where they Access Information
Secondary Audience 1				
Secondary Audience 2				

Other Audience(s)				
Audience Description	**Desired Behaviors**	**Current Mindset / Routine**	**Barriers**	**Where they Access Information**

D. Key Messages (See NC State Voice and Tone and On-Brand Marketing Messages worksheets)

After establishing target audiences, the next step in writing your marketing plan is to determine your key messages. The emphasis on these key messages may vary depending on your audiences, but the messages should be the essentials of your "elevator pitch" to the world.

What are the key things that everyone in the college, department or unit be sharing with the world? What are the messages that we want people to hear over and over and over again so that they begin resonating in the market? Who are we? Where are we going? What do we stand for? These messages should be bold, succinct and complement the NC State brand platform.

Each message should be backed up with supporting facts that bolster your message. Try to focus on messaging. Less is more.

Examples:

Key Message 1: Our college fosters new knowledge that impacts economic and societal prosperity.
Supporting fact: We have a #1 ranked research program.
Supporting fact: Our graduates have created 20 start-up companies in the past 5 years.
Supporting fact: Etc.

Key Message 2: We are an innovative, fiscally responsible college worthy of investment.
Supporting fact: We've increased donations by 50% while cutting expenses by 10%.
Supporting fact: We reinvest more than 25% of our annual gifts in student development and student research.
Supporting fact: Etc.

E. Goals and Objectives

A quality marketing plan consists of strong goals supported by objectives that lead your organization to achieve the identified goals. Here's a way to think about goals and objectives that may help differentiate their purpose.

Imagine your goals as your travel destination. Where do you want to go? Bermuda? Europe?
Your goals identify where it is your organization is going or what you want to achieve.

Your objectives are the specifics of how you will get to your destination. If we are going to Europe, are we going to fly on a plane? Are we going to take a boat? Are we going to swim?

Goals should be "stretch but achievable" and tied your college, department or unit's strategic plan. Objectives should be specific, measurable, actionable and relevant. There is no specific number of goals and objectives that must be in a marketing plan.

Goal 1: Increase visibility of the College among peers, partners, students and alumni through a strategic and targeted communications strategy (Encapsulates purpose of plan and unit - should not change from year to year)

> **Objective 1**: What and targeting whom (i.e. Increase top-of-mind awareness of our college by 10% among industry leaders by 2015
> **Objective 2:** What and targeting whom (i.e. Increase undergraduate enrollment numbers by 5% over the course of 3 years)
> **Objective 3:** Etc.

F. Tactics and Metrics

The tactical section of your marketing plan should outline the tangible communication vehicles you plan to deploy to reach the established objectives. NC State University Communications can serve as a resource when determining the most appropriate and impactful communications tactics to reach your objectives and goals. When determining your tactics, you should also keep in your key audiences and messaging in mind. Keep in mind that your tactics should be measurable and evaluated regularly to ensure relevance and performance.

Goal 1: Increase visibility of the College among peers, partners, students and alumni through a strategic and targeted communications strategy

Objective 1: Increase top-of-mind awareness of our college by 10% among industry leaders by 2016

Tactics	Metrics
Conduct a survey of industry leaders to determine baseline knowledge of college.	**Research Data**
Send a bi-weekly email newsletter to industry leaders featuring research news from the college. Use social media to also push this news.	**Open rates, click-thru rates, engagement on social media, "likes and retweets"**
Publish a digital and print annual report to be sent to selected industry leaders.	**Web hits, email open rates and click-thru rates, time on page for digital report**
Work with University media relations team to identify articles to pitch to trade and industry publications.	**Placements, web hits**

Goal 2:
Objective 2:

Tactics	Metrics

G. Budget and Timeline (See Sample Marketing Plan Budget and Timeline Worksheet)

After you've established your tactics and metrics, the next step is to figure out the logistics of implementing these tactics. All tactics require resources, in the form of staff, time and money. You'll want to list each tactic and provide an estimated budget and rough launch date for each. The goal of this exercise is to determine funding needs (or funding distribution across tactics) and to determine a rough schedule for your marketing deliverables.

Step 4: Implementation (See Tactical Implementation and Project Brief worksheets)

Now that your strategic marketing plan is written, it's time to shift your focus to implementation. For each tactic that you've outlined, you'll need to create a project plan. For example, if you want to create an annual report to send to industry leaders, you'll need to create a specific project and communications plan around this tactic. These individual project plans should be separate from your strategic marketing plan.

SWOT Analysis Tips

Taking time to recognize the "strengths," "weaknesses," "opportunities" and "threats" your organization faces is a great way to begin the discussion about how to market by forcing your team to consider all aspects of the organization and its competitive position in the marketplace.

"Strengths" and "weaknesses" are internal to your organization, while opportunities and threats generally relate to external factors.

Strengths
What advantages does your organization have?
What do you do better than anyone else?
What unique resources can you draw upon that others can't?
What do people in your market see as your strengths?

Weaknesses
What could you improve?
What should you avoid?
What are people in your market likely to see as weaknesses?
What factors cause you to be overlooked by stakeholders?

Opportunities
What good opportunities or trends can you take advantage of?
Are there changes in technology and markets that might be useful?
Do recent changes in government policy or standards benefit your cause?
Can you take advantage of any large-scale socio-economic forces such as social patterns, population profiles, lifestyle changes, etc.?
Are there calendar events such as anniversaries, holidays, or local events that we can we tie into?
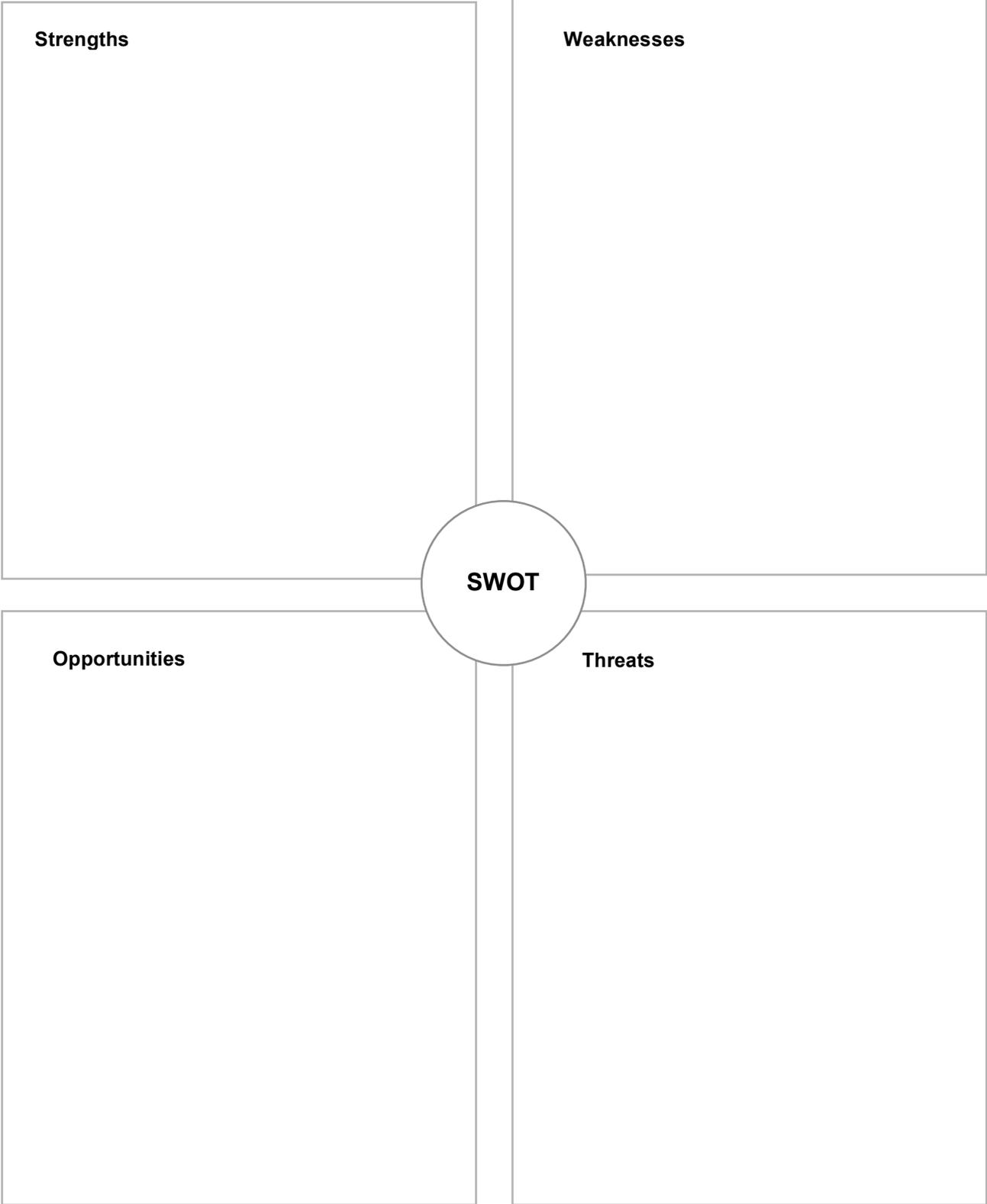
Threats
What external obstacles do you face?
What are your competitors doing?
Do you need to meet new changes in government policy or standards?
Is changing technology threatening your position?

SWOT Analysis Template

Strengths

Weaknesses

SWOT

Opportunities

Threats

Audience Analysis

We build support among audiences by understanding and paying attention to their needs and wants. Different audiences often require different messaging and different tactics. Understanding and segmenting audiences enables us to maximize the effectiveness of our efforts toward reaching those people who can best help us meet our goals.

Primary audiences are those who we most need to reach. Secondary audiences are those who are less critical to our plans, but may help influence primary audiences. Also, keep in mind that marketing tactics often reach many more people than those in the listed in the above target audiences. We call these tertiary audiences - those who we do not target directly, but may receive our messages, and may act on them in unintended ways. It is less important to do a full analysis of this audience, but it is important to recognize sensitivity issues.

Primary Audience
Description: Demographics, i.e. age, location, income-level
Justification: Why are they important?
Wants/Needs: What do we know about them that we can address?
Platforms: From what sources do they consume information, i.e. television, Facebook, magazines?

Secondary Audience 1
Description: demographics, i.e. age, location, income-level
Justification: Why are they important?
Wants/Needs: What do we know about them that we can address?
Platforms: From what sources do they consume information, i.e. television, Facebook, magazines?

Secondary Audience 2
Description: demographics, i.e. age, location, income-level
Justification: Why are they important?
Wants/Needs: What do we know about them that we can address?
Platforms: From what sources do they consume information, i.e. television, Facebook, magazines?

Tertiary Audience
Description: demographics, i.e. age, location, income-level
Justification: Why are they important?

Voice and Tone Chart

Voice Characteristic	Description	Writing Tips
Purposeful and Relevant	Our efforts and solutions create prosperity for our state, our nation, and our world. Think and do.	Identify the audience. Present NC State as an enterprise focused on solutions.
Confident	We are fearless in our pursuit of solutions to society's greatest challenges.	Write with conviction. Communicate to the identified audience using direct, unadorned language.
Tech Savvy and Innovative	NC State utilizes cutting edge technology and conceptual innovation to solve big problems.	Use accurate, industry-appropriate terminology. Consider your audience but do not speak down to it. Avoid meaningless buzzwords or jargon.
Modern	NC State is the quintessential research enterprise. Our innovative solutions solve tomorrow's problems, today.	NC State is a technology thought-leader and innovator. Content should reflect knowledge of the chosen medium (blogs, social media, academic research, etc.)
Helpful	NC State's solutions demonstrate a dedicated, active commitment to improving the lives of all mankind.	Produce content with unmistakable value and actionable insight.

On Brand Marketing Message

Marketing messages and tactics should support the NC State brand. This worksheet will guide your thinking as you consider how messages and tactics support the brand.

Messaging

NC State Brand Promise:
Creating economic, societal and intellectual prosperity.

- How does your messaging support NC State's brand promise?
- Explain how your messaging supports your overall strategic goals from your marketing plan.

Brand Drivers
Every tactic must clearly support NC State's brand drivers. Describe how your tactics align with or support our brand drivers.

- World-leading faculty at the forefront of interdisciplinary innovation
- Cutting-edge, solution-driven research and scholarship
- Extensive partnerships with business, industry, and government
- Leader in experiential education

Brand Personality
Describe how NC State's brand personalities will be reflected through your tactical implementation.

- Courageous
- Innovative
- Intellectual
- Purposeful

Tactical Implementation Chart

Tactic	Timing	Lead	Budget
Freshman Welcome Picnic	8/5/2015	Assoc. Dean	$1,000
College Faculty/Staff e-mail	9/15/2015	Mktg. Director	N/A
Dean's Advisory Council Mtg.	9/20/2015	Dean's Assistant	$2,500
Department A Brochure	10/15/2015	Mktg. Director	$5,000
Homecoming Alumni Reception	10/25/2015	Director of Develpt.	$1,500
College Magazine	11/1/2015	Mktg. Director	N/A
Major Gift Announcement	11/15/2015	Director of Develpt.	N/A
College Faculty/Staff e-mail	11/20/2015	Mktg. Director	N/A
Commencement	12/18/2015	Assoc. Dean	N/A
Department B Brochure	1/15/2016	Mktg. Director	$5,000
Website Launch	1/15/2015	Mktg. Director	N/A
College Faculty/Staff e-mail	11/28/2015	Mktg. Director	N/A

Tactical Implementation Worksheet

Project Name:

Medium(s) of Communication:

Audience(s):

Key Message(s):

Proof Points:

Call to Action:

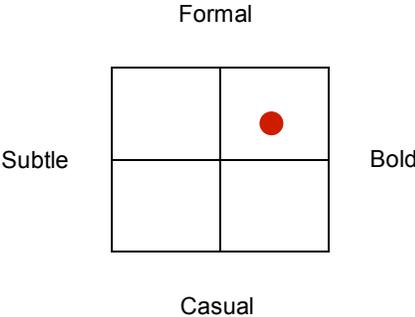**Additional Considerations:**

Strengths (Check all that apply)

One or more of our key strengths should come through in the content of every communication

☐ Courageous   ☐ Innovative
☐ Intellectual   ☐ Purposeful

Visual Spectrum

Our brand can flex in many directions depending on what is appropriate for the audience. Choose the right balance for your communications here.

Formal

Subtle   Bold

Casual

Sample Project Brief

A project brief outlines the implementation plan for specific tactics in the marketing plan.

Annual Report to Peer Influencers

Overview:
Each fall, the College of X sends an annual report to peer influencers. The purpose of this report is to inform key partners about our updated stats for the year. This piece is both print and digital. This project supports Goal 1, Objective 1 of College X's Strategic Marketing Plan.

Goals of Tactic:
College X's communication goals for the annual report include:
- Generate widespread awareness of the College X
- Provide clear, concise messaging that will peer influencers to think of College X as a leader in X education
- Influence rankings by increasing College X's overall awareness
- Increase overall open rates for digital version of annual report

Audiences:
The annual report will be distributed to a variety of influencer audiences including:

Industry Leaders: College x industry leaders X industry CEOs Trade publication publishers	**College Leaders:** College x peer college deans College X peer institution chancellors

Vehicles for Communication:

Website
- Create a digital Annual Report Process portal on the main College X website.
- Make sure the College X homepage showcases the annual report.

Social Media
- Use Facebook page and Twitter to post annual report release.

Word-of-Mouth (Partners)
- Share at annual conference for industry

Targeted Electronic Communication
- Send Bronto email communications peer influencers about the annual report.

Print Media
- Send printed version of report to select audience.

Campus Media Vehicles

Events

Public Relations

Video

Deliverables and Deadlines.

Task	Due Date	Assigned To	Completed
Review and approve communication plan for project	October 19	Group	
Draft copy for Project	October 29	Group	
Prep Marketing Materials	December 1	Joe	
Draft all content for website	November 16	Chris	

Measurable Goals and Monitoring Effectiveness of Communication

Using the proceeding vehicles of communication, the following measurable goals and measurements have been established.

- Monitor web traffic to the annual report page
- Track open rate and click-thru rates on the electronic communications sent.
- Monitor number of followers reached through social media.

Basic Marketing Plan Summary

Overview:
Teams
Situational Analysis
Audience Analysis
Objectives
Messaging
Budget
Strategies, tactics and deliverables

College Marketing Committee (one meeting per semester):
Dean and Leadership
College Director of Communications
UComm Marketing Coordinator
UComm PR Coordinator
Admissions Marketing Director
Faculty member
Director of Development

Marketing Work team (meets monthly or as needed):
College or Unit Director of Communications
UComm Marketing Coordinator
UComm PR Coordinator

Audience Analysis (See Audience Analysis Worksheet)
Audience one: characteristics - age, interests, where they find information, etc.
Audience two:
Audience three:
Etc.

Research:
Historical narrative
SWOT analysis (See SWOT Analysis Tips and Template)
Competitive set analysis
Secondary NC State research - Admissions, Alumni surveys
Secondary trade/industry research
Primary market research - Awareness, market testing

Goals and Objectives:
Goal/Mission: Support the strategic objectives of College or unit through a broad range of effective marketing, public relations and communications strategies and tactics. (Encapsulates purpose of plan and unit - should not change from year to year)
Objective 1: What and targeting whom (ie. Raise awareness among industry leaders)
Objective 2: What and targeting whom (ie. Raise enrollment numbers)
Objective 3:

Messaging

Objective 1: (restate Objective 1 from Goal and Objectives, i.e. Raise awareness among industry leader constituency.)

- Message supporting Objective 1 (ie. The college of X is a world leader in research leading to industry innovation.)
- Message supporting Objective 1
- Message supporting Objective 1

Objective 2: (restate Objective 2 from Goal and Objectives, i.e. Raise enrollment numbers)

- Message supporting Objective 2 (i.e. College X is ranked among leaders in field)
- Message supporting Objective 2

Tactics/Metrics (See Tactical Implementation Chart and Worksheet)

Objective 1: (restate Objective 1 from Goal and Objectives, i.e. Raise awareness among industry leader constituency.)

- Create a list of influencers for targeted industry (metric - list completed)
- Target social media to influencers of targeted industry (metric - number of posts; level of engagement)
- Create video about college research/innovation to share with influencers, post on web page; email link shared with influencers (metric - click through, contacts)

Objective 2: (restate Objective 2 from Goal and Objectives, i.e. Raise enrollment numbers)

- Develop departmental brochures
- Faculty visits to local high schools