

B2B  
MARKETING  
PLAN  
IN ONE WEEK



Ogilvy

# PLANNING TO SUCCEED

## What's the difference between a marketing plan and a marketing strategy?

Good question.

They tend to get confused. Sometimes the marketing plan refers to the execution of the strategy. Sometimes the marketing plan is the full kitchen sink. Strategy to tactics.

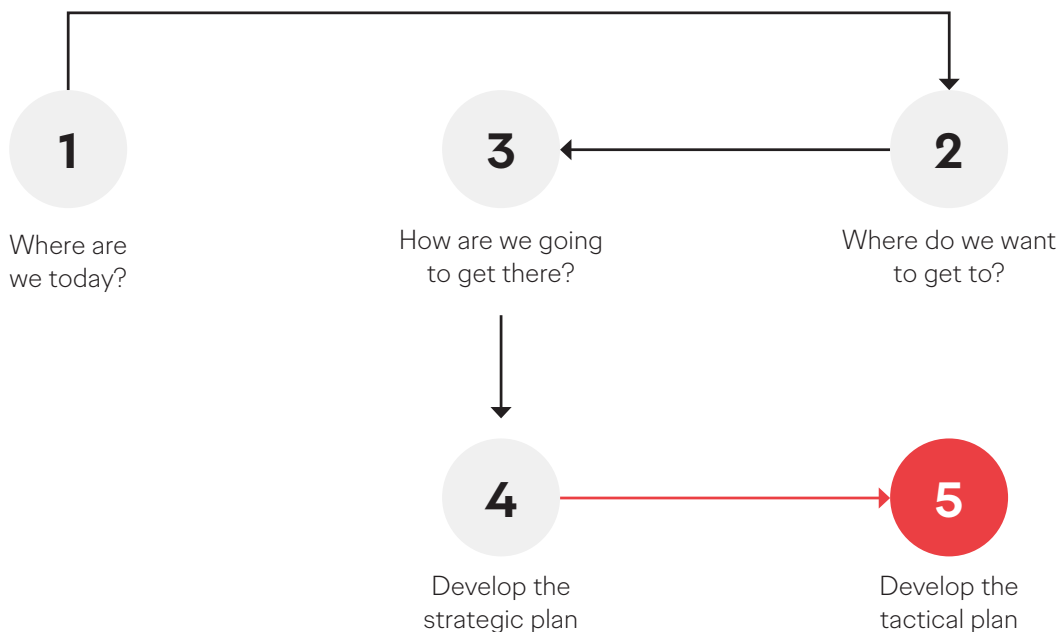
Our view is that it doesn't really matter as long as you do something. But that something can't just be a wish list of targets on a spreadsheet.

Marketing works so much better when it has a clear problem to solve or opportunity to grasp.

Of course, there are lots of things that get in the way of getting a marketing plan documented. So we created this simpler process which we have used with b2b organisations like yourselves. But it should work regardless of sector.

It is something that can be completed in days not months.

### Let us know how you get on.



**Strategy is defining where you want to get to and how you intend to get there. It is also described as the art of sacrifice. If you do everything plausible, it probably isn't a strategy.**

## INFORMATION TO STIMULATE GOOD THINKING



### Customer research

Anything that gives you insight into purchase drivers, non conversion and perceptions of the brand. Include search and social listening.

It is enormously helpful to be able to express the marketing problem in terms of the customer.



### Marketing management metrics

Management information provides context around existing revenues and performance.

Include marketing performance metrics, they will indicate where you have a problem or opportunity.



### Competitor audit and positioning map

A market map that demonstrates where you and your competitors operate.

It may provide clues as to the existence of where white space is. Are you different or do you need to be distinctive?



### Pestle

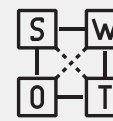
This is an analysis of the marketing environment. Clearly in today's world we tend to look at things through some additional lenses. Sustainability and ESG. Technology and innovation. Industry convergence. Digital transformation.



### Analyst perspective

This can include industry experts, journalists and financial analysts.

A little bit of outside perspective is always useful. They may have a clear perspective of what you need to do and where you need to invest.



### SWOT

An honest appraisal of your strengths and opportunities. Weaknesses and threats. Notice the order in which this is written.

If you feel brave you can play the game. How would the competition kill off your brand?

## SETTING UP FOR SUCCESS

1. Invest in the preparation.
2. Everyone should own one of the questions/inputs for Step 1.
3. Keep the team tight, empower them to make choices.
4. Invite representatives from or for sales, competitive intelligence, product, customer. Think about including a senior sponsor, who can help with 'sign off'.
5. Identify who is going to draft the first version of the marketing plan.
6. Bring in an outside facilitator to encourage objectivity. Like Ogilvy!
7. Share the worksheets up front. Some of the questions may need some forethought. i.e. category conventions.
8. It's a quick process but don't rush it. Give it your full attention over 2-3 bursts.
9. Remember you are unlikely to knock the ball out of the park by copying the competition, or carrying on as you are.
10. Strategy is nothing without execution. List and constantly review your top 5 big bets or tactics.

# STEPS AND WORKSHEETS

## STEP 1.

### WHERE ARE WE TODAY?

#### Session guide

- Present the highlights from the inputs.
- Review worksheet #1 questions. Identify which are the important ones to address. Answer them.
- Summarise the key points under the headings of customers, competitors and company.

#### Optional exercise.

Put yourselves in your competitor's shoes. How would you steal market share or put us out of business.

### WORKSHEET 1

- What are the critical trends impacting our markets?
- What are the category conventions?
- How is the business performing?
- Do we benefit from a wide moat?
- What are our strengths and weaknesses?
- Are we offering products and solutions the market needs/wants?
- Are they priced competitively?
- What makes us stand out in the market?
- What do customers think of us? Good and bad.
- Why do we fail to attract prospects?
- Why do we fail to convert prospects?
- How relevant and motivating is our CVP?
- What are our major competitors doing differently?
- What makes our fiercest competitors a threat?
- Are our channels to market working effectively?

## STEP 2.

### WHERE DO WE WANT TO GET TO?

#### Session guide

- Split into teams.
- Do the warm up exercises. Transport yourself 5 years into the future. Write the company's linkedin profile or the headline in a journal. **Your company has transformed itself, 5 years ago it was ... now it is ... and that's all because ... all the while its competitors were focusing on ...**
- Ask them to address the questions directly. You will need to answer all of them.
- Critical to get alignment within and across teams.

### WORKSHEET 2

- What do we need to defend?
- Where can we grow?
- Which customer segments should we prioritise?
- How could our proposition be made stronger?
- What and where are the fresh new market opportunities?
- How should we articulate our future success?
- What will we need to change?
- What would happen if we carried on as we are?

## STEP 3.

### HOW ARE WE GOING TO GET THERE?

#### Session guide

- This works as a group session, as long as the group isn't more than 10 or so.
- Identify which questions you think are the most important. Be honest. Do you need to be different. Or look different. Where could you innovate? (spoiler alert: it doesn't have to be product or technology, it could be marketing)

#### Critical exercise

Fill in the blanks ... We will achieve (X) by doing (Y) and not (Z). We will be successful because of (S). This needs to feel big but achievable. i.e. increasing market share.

### WORKSHEET 3

- When are we at our brilliant best?
- What category conventions could we break?
- How could we make our CVP more relevant, more motivating?
- Can communications solve our challenges?
- Do we need to show up in a more distinctive way?
- Do we need a new mission or purpose to set direction?
- Would it help if we reframed the way we describe our category?
- Do we need to offer new solutions, distribute through different channels or address pricing?
- What do we need to start doing and stop doing?
- What will be your five big bet tactics?

**STEP 4.**

**DEVELOP THE STRATEGIC PLAN**

**Session guide**

- Get everyone to summarise their first thoughts for the template.
- Do not try and complete this as a group.
- Nominate a small team to summarise the session(s) and create the first draft of the template below.
- Expect to have to write at least three iterations. Alignment is the hardest thing so make sure politics doesn't get in the way.

**STRATEGIC MARKETING PLAN TEMPLATE**

<p><b>Present situation</b> Summary of the today's situation and challenges.</p>	<p><b>Growth opportunities</b> What are the opportunities for business growth?</p>	<p><b>Future success</b> Explain how we will know our strategy has been successful.</p>
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**Our Strategy**

We will achieve (X) by doing (Y) and not (Z). We will be successful because of (S).

**Start and stop**

What are we going to start and stop doing?

<p><b>Critical drivers</b> What are our strengths and why should we expect to be successful?</p>	<p><b>Potential barriers</b> What internal and external factors could get in the way of success?</p>	<p><b>Resources</b> Where do we invest, where we double down, where can we experiment and learn?</p>
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**EXAMPLES OF XYZ STATEMENTS**



**Information technology**

Generate \$100 million in leads by promoting solutions to the c-suite rather than hardware to the IT department.



**Accounting software.**

Increase our share of the 1-10 employee market by 20%. From software to book-keeping as a complete service.



**Fleet management**

Grow vehicle sales in the small fleet market by 10% year on year for the next three years. Making the after sales and fleet management experience (for part time managers) as reliable as our vehicles.



**Financial services**

Increasing fund preference amongst financial advisors by making our products easy to understand and explain, not just easy to buy.

**CONTACT**

For more information and to talk about working with us, please contact us at Ogilvy.

**James Myers - Head of Strategy**

james.myers@ogilvy.com



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