



The Agency Oneto Marketing Strategy Framework & Plan Template

Introduction

Modern Marketing is complex. And one can get lost thinking about how to approach it. And worse, marketers can chase after every marketing tactic and waste precious marketing dollars.

In this document, we simplify marketing planning. We tell you what factors will impact your marketing strategy and give you a step-by-step guide on how to approach building your annual marketing plan.

Marketing Strategy Framework: 5 Factors to consider when defining your marketing strategy and channels

Marketing Strategy Framework

Introduction

Marketing today is more complex than ever with multiple business objectives, a multitude of channels available, and consumer attitudes and preferences frequently changing. You really can't do it all unless you have an endless budget, and few companies and marketers are that lucky. While you may be tempted to chase after each new shiny marketing channel, STOP! Pause before you act. You need to be discerning about what you implement, questioning the value of where you spend each dollar. And not all companies and brands are created equal. You need to customize your marketing approach, not assume all channels need to be used.

On the next few pages, we offer a framework with **5 factors** to consider when defining your **marketing strategy and channels**.

Marketing Strategy Framework

5 Factors to consider when defining your marketing strategy and channels

1. **Company stage.** If you are a new vs. established brand, you need to be careful about the weight of your investment against brand awareness building activity vs. bottom of the funnel promotional activity. You may think that you need to focus only on digital marketing that is performance driven, but if you don't weight your spending to building awareness and getting into the consideration set, you may do your brand a disservice. For example you might drive sales in the short-term, but you may not build your brand equity and you may lose long-term sales impact, as well. Product alone is not king, as many technology companies are now learning as competition increases in their respective categories. Or consider Old Navy, a more established brand, that experienced lost sales because they realized they relied too much on promotional lower funnel marketing vs. brand building in late 2019. Adidas had a similar experience—finding that brand marketing drove 65 percent of its sales across most channels and yet only 23 percent of its spending was weighted against upper funnel brand marketing. Or, consider the fact that historically CPG companies have found that advertising typically delivers 2x or more the short-term impact when factoring in long-term effects, increasing overall ROAS.

Marketing Strategy Framework

5 Factors to consider when defining your marketing strategy and channels

2. **Business model.** Certainly your business model will impact your go-to-market activity. If your business is eCommerce driven, you'll likely be weighted more towards digital tactics and be more concerned with acquisition and retention, especially in the short-term. Email marketing will likely be a critical channel for retention and still delivers some of the highest ROI's. Yet, don't rule out more mass awareness channels at the appropriate stage in your business. As many DTC companies have demonstrated, to build broad Mass awareness, a company typically has to move away from only online. Consider Casper, Stitch Fix, and Parachute.

For CPG brands, 70 percent of goods are still purchased in-store. So, while digital can be a part of your mix, be careful about how far you swing in that direction. Plus, remember that most CPG categories are Mass targeted. While digital can help you target, in your upper funnel, be careful of not targeting too narrowly.

For B2B players, content marketing is that much more important. Thinking thoughtfully about how you are bringing leads into your sales funnel and driving them through to a sale is a different thought process than for other business categories.

Finally, technology companies are again different. Depending on if they are hardware, software, software as a service, B2B targeted vs. B2C targeted—all this can dictate a different marketing strategy and channel prioritization.

Marketing Strategy Framework

5 Factors to consider when defining your marketing strategy and channels

- 3. Category.** The category you play in will inform your channel choices, too. For instance, fashion and beauty are more social and influencer driven. In CPG, some categories are lower involvement and may not need social channels (e.g., trash bags, plastic wrap) compared to food or pet related categories that are higher involvement and may get more value from social content. Sometimes a brand can have an unexpected breakout impact with a channel, such as Denny's practically revitalizing its brand through its Twitter content.
- 4. Consumers, Audiences, & the Customer Journey.** Before building your marketing plan, it's critical to start with who your target customer(s), consumer(s), and/or audiences are and what behavior you are looking to drive (e.g., acquisition / first purchase, retention / repeat, loading / multiple purchases). You also need to understand a customer's buying journey to identify the best apertures to reach them. For example, you will use different media to reach an adventure seeker or a foodie who does a lot of research compared to a product that is more convenience-oriented and impulse-driven. Or, if you had a product targeted towards moms for school-age children compared to a luxury vacation offer targeted towards retirees.

Marketing Strategy Framework

5 Factors to consider when defining your marketing strategy and channels

- 5. Resources & Sophistication.** Perhaps it goes without saying that if you have a small budget the brand will execute different tactics than a brand with a larger budget. Yet, I want to emphasize this again, because it is often the companies with few resources that get pulled by all the tactics experts claim they need to execute. Don't get sucked in! If you have limited resources, you need to be prudent and creative about how you deploy those dollars. Also, if you don't have the budget to invest in the right back-end technology, you can also focus on the wrong tactics and try to be more sophisticated in your approach than you should be. You can easily add more complexity than is required and deploy resources inefficiently. If you're less sophisticated, remember to walk before you run. Don't bite off more than you can manage. Personalization, for example, will be less important for you. But if you are a sophisticated marketing organization, testing new channels and leaning in to more sophisticated marketing approaches like data-based marketing and personalization will likely be more important for you. Or, if you are a company that manages categories that tend to market to younger cohorts (think Coca-Cola, Pepsi, Frito-Lay), as these companies do, you likely want to be on the forefront of new marketing channels that are attracting those audiences.

Marketing Plan Steps: How to simply build your annual marketing plan

Annual Marketing Plan

Introduction

Modern marketing is complex. But it doesn't have to be.

Having worked across multiple industries from Consumer Packaged Goods (CPG) to eCommerce and gotten sucked into the hype of new marketing channels from social media to influencers to content marketing, I can understand how marketers get tripped up on how to think about building a marketing plan in today's industry environment and media landscape. New terminology is constantly introduced even when concepts aren't new but applied to new tools and channels. And, experts in specific fields champion certain tactics as if all marketers across all industries should jump in full force.

Before doing that, stop! It's helpful to step back and revert to fundamentals that still apply in today's marketing world. In this article, I want to break down in simple terms what is helpful to have in place before building your Marketing Plan and an approach to building a plan regardless of what new tactics may come into play. The marketing and media world can continue to be complex, but your planning can be simplified.

Annual Marketing Plan

Elements to have in place as your foundation before starting to build a Marketing Plan

So, let's start here. These are the elements you will want to have in place as your foundation before starting to build an annual Marketing Plan:

1. Develop your **Brand Platform**, including your brand essence or promise, the brand positioning, personality and tone, key messages, and distinct visual assets.
2. You should be clear on your **Consumer Target(s) or Audiences**. Who is your primary, secondary, and tertiary targets? Or, who are the multiple audiences you need to target to grow your brand? Ideally, have **Personas** created for each.
3. Finally, understand the **Customer Journey for your key audiences**—how do they start their shopper journey, how do they learn of product offerings, where do they seek out information to inform their purchase, how are they influenced, and where and how do they buy. You should also understand their motivations for and doubts or barriers around their purchase. Doing a “Day in the Life” exercise can also give you insight into the right apertures around which to reach your audience at a time they will be most receptive to it.

With that in hand, you can then consider **6 components to building your Annual Marketing Plan**. We'll cover those on the next few pages.

*Looking for help with your Brand Foundation, Marketing Strategy, and Marketing Plans?
[Reach out to us at The Agency Oneto to start the conversation.](#)*

Annual Marketing Plan

1. Articulate your Marketing Objectives & Goals
2. Define key Marketing Strategies

1. **Articulate your Marketing Objective and Goals.** These should, in turn, support your Business Objective and Goals. They will consider your consumer or audience and what action you are wanting them to take. Think about the consumer insight around barriers you may need to overcome or an insight you believe you need to tap into to unlock growth. You may be considering where you are trying to move your brand From and To or the fact that you may be trying to expand your audiences to a new growth target to maintain relevance and to drive growth. You also may be expanding into new sales channels. Your Goals should be metrics; what needs to be achieved to deliver on the business ambitions. What are your household penetration or awareness goals or perhaps your conversion and retention goals? If you don't have access to that type of data, then what are simply your sales or share goals?
2. **Define key Marketing Strategies.** These are the broad approaches that you will take to your marketing that will inform channels and tactics. These strategies should be informed by the Customer Journey to identify the right apertures to reach the customer with the right messages. These can also be informed by your business maturity, your go-to-market model, your category, resources, level of marketing sophistication, and budget. Refer to our article, "Marketing Strategy Framework: 5 Factors to Consider Before Building your Marketing Plan" for more details on this last point.

Refer to the template on the next page and the example on the following page.

Annual Marketing Plan - **Template**

Marketing Objectives (Consumer Target, Behavior Driving)	<ul style="list-style-type: none">• Enter content here
Goals (Measurable)	<ul style="list-style-type: none">• Enter content here
Key Strategies / Plan Elements	<ol style="list-style-type: none">1. Enter content here2. Enter content here3. Enter content here4. Enter content here5. Enter content here

Annual Marketing Plan - Example

Marketing Objectives (Consumer Target, Behavior Driving)	<ul style="list-style-type: none">• Increase HH penetration by driving brand awareness and trial for core product line• Continue to stretch the brand to younger and Mass consumers• Bring the brand positioning to life, strengthening consumer connection to the brand• Support new channel distribution and drive trial in those retailers• Support growth of eCommerce business
Goals (Measurable)	<ul style="list-style-type: none">• HH penetration - +x% to x%• Increase Share in Category (+x.x pts)• Increase topline sales (+xxx%)• Amazon sales & growth rate (+\$x, +x%)• Owned eCommerce sales & growth rate (+\$x, +x%)
Key Strategies / Plan Elements	<ol style="list-style-type: none">1. Expand reach through channels that are important for reaching today's consumers, while also being targeted given limited distribution2. Leverage "Other People's Reach" (OPR) (e.g., brand loyalists, tiered influencer strategy, partners) to build awareness with limited resources3. Optimize owned channels to build interest, consideration, and engagement4. Build scale through targeted, integrated campaigns at key time periods aligned with retailer promotions and new distribution5. Execute close to the shelf6. Optimize Amazon pages and advertising7. Test best funnel for driving sales to eCommerce site8. Support our causes

Annual Marketing Plan

3. Prioritize Your Channels

3. **Prioritize your Channels.** Considering your Marketing Strategies, outline in a simple table what Paid, Owned, and Earned channels and tactics you will deploy across the Marketing Funnel from Awareness, Consideration, Trial, Repeat, and Advocacy. (Note that your Funnel may vary depending on your type of business such as if you are B2C vs. B2B.)

Refer to the template on the next page and the example on the following page.

Annual Marketing Plan - **Template**

Summary

Enter - Brand Name					
Consumer Target(s) / Audiences	• Enter content here				
Behavior Driving	• Enter content here				
Channels / Tactics					
	Top of Funnel	Middle of Funnel	Bottom of Funnel	Bottom of Funnel	Loyalty Loop
	Awareness	Consideration, Interest, Intent, Evaluation	Trial, Conversion, Purchase	Repeat / Loyalty	Engagement & Advocacy
Paid	• Enter content here	• Enter content here	• Enter content here	• Enter content here	• Enter content here
Owned	• Enter content here	• Enter content here	• Enter content here	• Enter content here	• Enter content here
Earned	• Enter content here	• Enter content here	• Enter content here	• Enter content here	• Enter content here



Annual Marketing Plan - Example

Summary

Brand Name					
Consumer Target(s) / Audiences	<ul style="list-style-type: none"> Primary Target Secondary Target 				
Behavior Driving	<ul style="list-style-type: none"> Grow awareness and build Household Penetration Drive Trial Build engagement 				
Channels / Tactics					
	Top of Funnel	Middle of Funnel	Bottom of Funnel	Bottom of Funnel	Loyalty Loop
	Awareness	Consideration, Interest, Intent, Evaluation	Trial, Conversion, Purchase	Repeat / Loyalty	Engagement & Advocacy
Paid	<ul style="list-style-type: none"> Targeted digital spend Targeted Amazon spend Events 	<ul style="list-style-type: none"> Trial opportunities - sampling, coupons Shopper Marketing 	<ul style="list-style-type: none"> In-store tactics (e.g., Displays) Price tactics 	<ul style="list-style-type: none"> Retargeting campaign 	<ul style="list-style-type: none"> Events
Owned		<ul style="list-style-type: none"> Website Social Share Inspiration - Youtube Videos, etc. 		<ul style="list-style-type: none"> Email Marketing 	<ul style="list-style-type: none"> Social Email Marketing Content Marketing Cause
Earned	<ul style="list-style-type: none"> Social / Influencers Super User Outreach Partnerships PR 				<ul style="list-style-type: none"> Social Cause

Annual Marketing Plan

4. Allocate your budget

4. **Allocate your budget.** From there, it's helpful to have a guide on how you'll want to allocate your budget across these tactics based both on importance, but also realistically cost. As you'll read in our "Marketing Strategy Framework: 5 Factors to Consider Before Building your Marketing Plan," be careful about placing too much of your spend in the bottom of your funnel. You may want to come back to this after you look at your spend through the lens of your Campaigns for the year. You may need to reallocate across the channels depending on how your campaigns take shape.

Refer to the template on the next page and the example on the following page.

Annual Marketing Plan - **Template**

Budget

Tactic / Initiative	Budget	Notes
TOTAL		

Annual Marketing Plan - Example

Budget

Tactic / Initiative	Budget (\$000's)	Notes
Digital Marketing - Top/Middle of Funnel	\$1,100	
Digital Marketing - Bottom of Funnel	\$900	
Amazon Marketing	\$2,000	
Events	\$500	
Influencers & Super User Outreach	\$300	
Partnerships	\$50	
PR	\$250	
Sampling	\$500	
Coupons	\$500	
Shopper Marketing	\$1,500	
Owned Channels - Website, Social	\$250	
Content Marketing	\$250	
In-Store Displays	\$1,500	
Email Marketing	\$100	
Cause	\$300	
TOTAL	\$10,000	

Annual Marketing Plan

5. Build your Marketing Calendar and Campaigns

5. **Build your Marketing Calendar and Campaigns.** Finally, taking all this into account, you want to build your Marketing Calendar and Campaigns. Consider key time periods and priorities for your business. You'll want to think about how you'll build the tactics per time period to create synergistic effects. One thing many miss, despite marketing tactics having different ROI's, is that they build on each other. When thinking of these time periods, think in Campaigns. You may have separate campaigns with different objectives, as well, such as brand building campaigns. You also may have some tactics that are evergreen throughout the year, such as your email marketing. Some emails will be tied to a campaign and some likely will not. Another thing to consider is the potential of using campaign arcs—taking one campaign or idea and maximizing it over time hitting different consumer targets (e.g., releasing the campaign starting with a loyal audience and then expanding out to broader audiences) or building on the idea over time. Or, you may think about how you want to take your consumers on a journey with the brand over the year, telling different stories and building brand themes around key equities. Once you have your Campaigns planned, you can move on to execution and campaign creative.

Refer to the template on the next page and the example on the following page.

Brand: Calendar & Campaigns - **Template**

NOTE: This is an illustrative template. Your business may require a different format considering your business model and go-to-market approach. This is provided as a starting point.

	Quarter or Year			
	Campaign 1	Campaign 2	Campaign 3	Campaign 4
Dates				
Theme / Story				
Objective				
Budget				
Core Consumer Target / Persona				
Consumer Insight				
Product Focus				
Key Messages				
Paid Channels				
Owned Channels				
Earned Channels				

Brand: Calendar & Campaigns - Example

NOTE: This is an illustrative template. Your business may require a different format considering your business model and go-to-market approach. This is provided as a starting point.

	2020			
	Campaign 1	Campaign 2	Campaign 3	Campaign 4
Dates	Jan - Feb	Mar-Apr	Jun-Jul	Sept - Dec
Theme / Story	New Beginnings	New Product Launch	Summer Fun	Holiday Cheer
Objective	Brand building - story arch	Support new product launch	Brand building - story arch	Sustained holiday campaign
Budget	\$500k	\$4 million	\$500k	\$3 million
Core Consumer Target / Persona	1. Target #1 2. Target #2	1. Target #1 2. Target #2	1. Target #1 2. Target #2	1. Target #1 2. Target #2
Consumer Insight	Core consumer insight...	Core consumer insight...	Core consumer insight...	Core consumer insight...
Product Focus	Full suite of products tied to campaign theme	New Products	Full suite of products with summer theme	Holiday assortment
Key Messages	1. Message #1 2. Message #2 3. Message #3	1. Message #1 2. Message #2 3. Message #3	1. Message #1 2. Message #2 3. Message #3	1. Message #1 2. Message #2 3. Message #3
Paid Channels	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3
Owned Channels	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3
Earned Channels	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3 	<ul style="list-style-type: none"> Channel #1 Channel #2 Channel #3

Brand: Calendar & Campaigns - **Template**

NOTE: This is an illustrative template. Your business may require a different format considering your business model and go-to-market approach. This is provided as a starting point.

Map your campaigns and the associated channels by funnel across the months. Consider color coding by campaign or channels. You can make the channel content more specific than is noted here.

	Year											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Key Initiatives												
Key Themes												
Awareness & Consideration												
Trial & Purchase												
Engagement & Advocacy												

Brand: Calendar & Campaigns - Example

Campaign #1

Campaign #2

Campaign #3

Campaign #4

NOTE: This is an illustrative template. Your business may require a different format considering your business model and go-to-market approach. This is provided as a starting point.

Map your campaigns and the associated channels by funnel across the months. Consider color coding by campaign or channels. You can make the channel content more specific than is noted here.

	Year											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Key Initiatives	Brand Campaign		New Product Launch			Brand Campaign			Holiday Launch			
Key Themes	New Year		Spring			Summer			Holiday			
Awareness & Consideration	Digital Marketing PR Event Influencers		Digital Marketing Targeted Amazon Spend Influencers PR			Digital Marketing Print PR Event Partnerships			Digital Marketing + Retargeting Targeted Amazon Spend Influencers PR			
Trial & Purchase			Sampling & Coupons Shopper Marketing In-Store Displays		Retargeting				Sampling & Coupons Shopper Marketing In-Store Displays			
Engagement & Advocacy	Social Youtube Email Cause		Social Youtube Email			Social Content Email			Social Youtube Email Cause			

Annual Marketing Plan

6. Plan Your Measurement Loop and Test & Learn Initiatives

- 6. Plan your Measurement Loop and Test & Learn initiatives.** A critical element of marketing is to measure your results. That's not a new concept that started with Digital Marketing by the way. I've been trained to do that for over 20 years. It should be a common discipline that you execute and then measure the results of your campaigns and channels so you can optimize them going forward. Ideally you don't do this at the end of the year, but regularly after every campaign so you can adjust going forward. Given all the new channels in the marketplace today, you should also have a Test & Learn plan. Never switch all your tactics at once; test your way into new initiatives. But make sure to do it; testing new channels and approaches is critical given our every-changing marketing environment.

Refer to the template on the next page and the example on the following page.

Measurement - Example

NOTE: This is an illustrative template. Your business model may require tracking different metrics. Yet, the intent is the same—measure each campaign and tactic. Know the budget spent against each tactic or channel. You should go in knowing what your expected return is from the tactic. Measure the actual results, getting to the margin generated from the channel. Calculate your ROI.

Campaign	Tactic / Channel	Budget (\$000's)	Expected Margin / Measurement	Expected ROI	Actual Margin Generated	Actual ROI
TOTAL						

Measurement - Example

NOTE: This is an illustrative template. Your business model may require tracking different metrics. Yet, the intent is the same—measure each campaign and tactic. Know the budget spent against each tactic or channel. You should go in knowing what your expected return is from the tactic. Measure the actual results, getting to the margin generated from the channel. Calculate your ROI.

Campaign	Tactic / Channel	Budget (\$000's)	Expected Margin / Measurement	Expected ROI	Actual Margin Generated	Actual ROI
Campaign #1 - Brand Building	Digital Marketing	\$300	\$400	33%	\$300	0%
Campaign #1 - Brand Building	PR Event	\$50	\$50	0%	\$75	50%
Campaign #1 - Brand Building	Influencers	\$15	\$20	33%	\$25	67%
Campaign #1 - Brand Building	Social	\$10	\$15	50%	\$20	100%
Campaign #1 - Brand Building	Youtube	\$50	\$50	0%	\$50	0%
Campaign #1 - Brand Building	Email	\$25	\$30	20%	\$40	60%
Campaign #1 - Brand Building	Cause	\$50	\$10	-80%	\$10	-80%
TOTAL		\$500	\$575	15%	\$520	4%

Test & Learn Initiatives and Tactics - **Template**

Testing Tactic / Initiative	Budget (\$000's)	Learning Objective	Hypothesized Goal / Measurement	Results / Measurement	Learning / Go Forward Plan

Test & Learn Initiatives and Tactics - Example

Testing Tactic / Initiative	Budget (\$000's)	Learning Objective	Hypothesized Goal / Measurement	Results / Measurement	Learning / Go Forward Plan
Triggered email series	\$5	Confirm triggered emails will return higher than batch & blast emails; test series content	Open rate = x% Click thru = y% Purchase = z% Average \$ per email = \$xyz		
Campaign targeted towards new target xyz	\$50	Confirm if new target is fruitful	Acquisition cost = \$x ROI = 0%		
Social partnership with xyz partner	\$5	Test if partner a good fit for brand and would increase our audience	Follower growth = or greater than # ROI = 0%		
New type of social marketing campaign	\$5	Test new tactic and possible return	Follower growth = or greater than # ROI = 0%		
PR Event	\$25	Test if successful at growing reach with new growth target	Follower growth = or greater than x Purchases = y		
Promotion Test	NA	Test if promotion will be more effective than prior year promo	Sales = or greater than x		

Annual Marketing Plan

Close

So, there you have it! This step-by-step guide should demystify Marketing Planning in today's crazy, complex modern marketing world. And make it simple. One can get overwhelmed by the demands on marketing and the number of channels, but if you step back and follow a clear, disciplined approach, you can creatively make your way to an impactful plan that can deliver on your objectives and not make you crazy.

*Looking for help with your Brand Foundation, Marketing Strategy, and Marketing Plans?
Reach out to Kathy at The Agency Oneto to start the conversation.*

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Thank you!