A woman with long braids, wearing a white blazer, stands and points towards a large screen displaying charts and graphs. She is addressing a group of people seated around a long white table. The room has large windows in the background, and the overall atmosphere is professional and collaborative.

MARKETING PLANNING GUIDEBOOK:

A Practical How-To Guide
on Bridging Silos to Create
Rewarding Marketing Plans

“Organizations with tightly aligned sales and marketing functions enjoy 36% higher customer retention rates and 38% higher sales win rates.”

“20 Sales and Marketing Alignment Statistics,” The Pipeline, Zoominfo.com

MARKETING CONVERGENCE SOLUTIONS



MARKETING CONVERGENCE SOLUTIONS

3

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“**Strategic planning** is the managerial process of creating and maintaining a fit between the organization’s objectives and resources and the evolving market opportunities. The goal of strategic planning is long-run profitability and growth. Thus, strategic decisions require long-term commitments of resources.”

Charles Lamb, Carl McDaniel, Joseph Hair, *Essentials of Marketing*, Cengage Learning, Seventh Edition, 2011

“...**marketing convergence strategic planning** refers to the process of aligning messaging and content across traditional and digital communications channels while fostering collaboration between marketing and sales functions..”

RE Casper, *Marketing Planning Guidebook, A Practical How-to Guide on Bridging Silos to Create Rewarding Marketing Plans*, Marketing Convergence Solutions, Second Edition, April 2024

*MARKETING PLANNING GUIDEBOOK: A PRACTICAL HOW-TO GUIDE
ON BRIDGING SILOS TO CREATE REWARDING MARKETING PLANS*

Second Edition April 2024

by Robert Casper

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BEFORE BEGINNING, AN EXPLANATION IS IN ORDER

The purpose of this guide is to help businesses devise a practical and actionable strategic roadmap with marketing objectives, strategies, and tactics designed to attract new customers, retain current customers, and drive business growth.

Many well-written marketing guidebooks authored by academics go in-depth with how to plan, definitions of marketing components, and introduce vague planning concepts such as “societal context.” In the end, they sometimes leave the reader with more questions than answers.

Most of these guidebooks offer sound information, but where they fall short is not fully explaining who, what, when, where, why, and how of the planning process. This marketing convergence guidebook is very clear about who should plan and the steps necessary to bring the plan to completion.

Another misstep companies sometimes make is leaving the marketing planning up to professional planners, whether on staff or brought in for planning. They may have their place in adding structure and organization to the planning process, but actionable input must come from people in the organization closest to the customer, especially the sales teams.

The following pages will show marketing planners and planning meeting facilitators how to assemble the right planning team, create assignments, train for the planning, facilitate the planning, and use the power of both individual and group thinking to develop a strategic marketing plan that delivers the desired results.

Preface

The marketing planning ideas and approaches described here are based on academic principles that are tempered by years of real-world experiences of the writer developing marketing plans in both corporate and advertising agency executive marketing positions.

Introduction to Marketing Planning Using Marketing Convergence

Today, AI-powered, data-driven marketing goes further in qualifying prospects through lead generation marketing programs that can cultivate prospects to reach the “evaluation” level where sales can take over.

WHAT IS MARKETING CONVERGENCE?

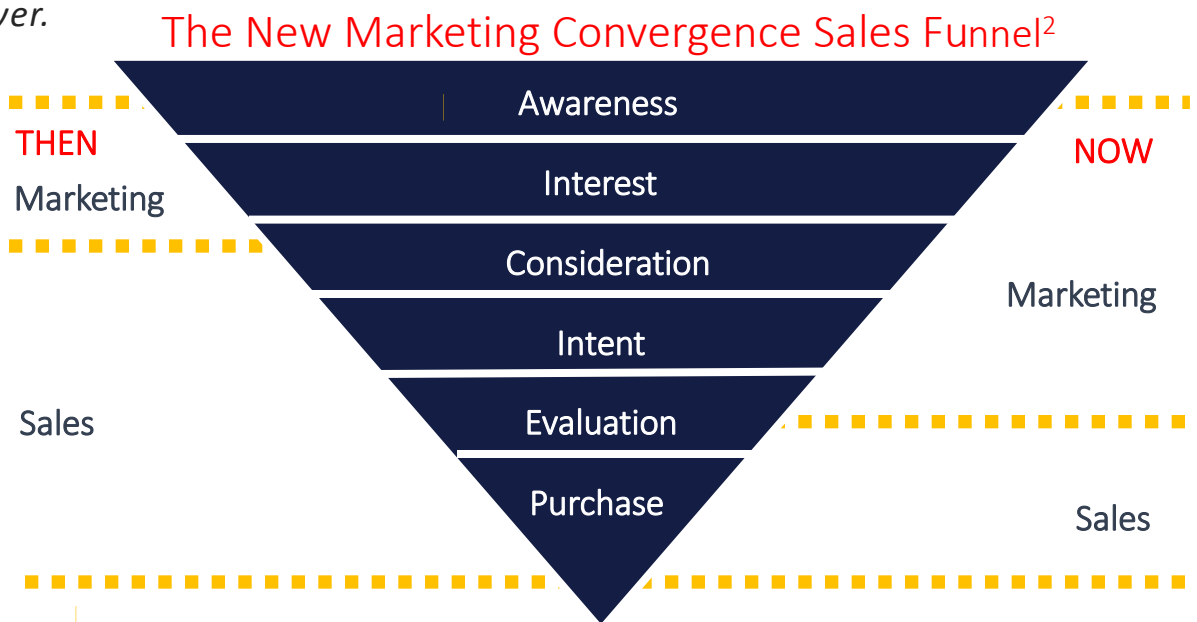
Marketing convergence is a strategic approach that unites marketing and sales teams to create a consistent brand message across all channels, both traditional and digital. This unified strategy improves customer experience by providing seamless interactions from initial contact to purchase.

Traditionally, marketing was given the task of developing awareness and interest in products and brands through mass communications and direct marketing. Sales had the job of finding and qualifying leads and turning “interest” into “consideration” and finally to a “purchase.”

Today, AI-powered, data-driven marketing goes further in qualifying prospects through lead-generation marketing programs that can cultivate prospects to reach the “evaluation” level where sales can take over.

Sometimes referred to as “Smarketing,”¹ this alignment between sales and marketing teams emphasizes the need for these two usually separate functions to work closely together to achieve common objectives.

More robust and customer-centric marketing that helps drive customers to the purchase decision does not diminish the role of sales. It helps maximize its efficiency by providing warmer and more qualified leads.



¹Hubspot.com, *“The Power of Smarketing,”* Web Guide

²Steve Patrizi's, *“The New Marketing & Sales Funnel,”* Steve Patrizi's Blog, 2012

BRIDGING SALES AND MARKETING FUNCTIONS THROUGH MARKETING CONVERGENCE STRATEGIC PLANNING

A key measure of marketing's effectiveness is how well a company's marketing objectives, strategies, and tactics are designed to help grow the customer base, improve customer retention, and generate incremental revenue.

It can be extremely difficult to directly correlate increased sales and customer growth because traditional marketing strategies are mostly designed to improve and measure increased impressions, higher brand awareness, or improved customer satisfaction.³

However, more highly focused marketing programs can be designed to move the sales needle by converging sales and marketing functions in the marketing planning process.

For the planning process to be successful, sales and marketing planning team members must buy into the process and participate in facilitated and collaborative planning meetings.

Role of Sales Members in Planning *Share their data (SQL or Sales Qualified Leads) and insights from their CRM system, first-hand customer knowledge, and other resources.*

Role of Marketing Members in Planning *Lend their expertise with messaging, qualified leads from Marketing efforts (MQL or Marketing Qualified Leads), promotions, and communications knowledge and skills.*

Then together, they develop marketing objectives and strategies that are better aligned to reach current customers, find new customers, and generate incremental revenue.

Convergence marketing planning can be a win-win for both sales and marketing functions.

Marketing professionals can develop and implement highly targeted and measurable marketing solutions that can directly affect sales growth. Sales teams end up with more highly motivated customers and qualified leads that are nearer to the purchase decision.

Introduction to Marketing Planning Using Marketing Convergence

Convergence planning can be a win-win for both sales and marketing.

Sales teams end up with more highly motivated customers and qualified leads that are nearer to the purchase decision.

Marketing professionals can develop and implement measurable marketing solutions that can directly affect sales growth.

³"How Can Traditional and Digital Marketing Work Together," American Marketing Association

Introduction to Marketing Planning Using Marketing Convergence

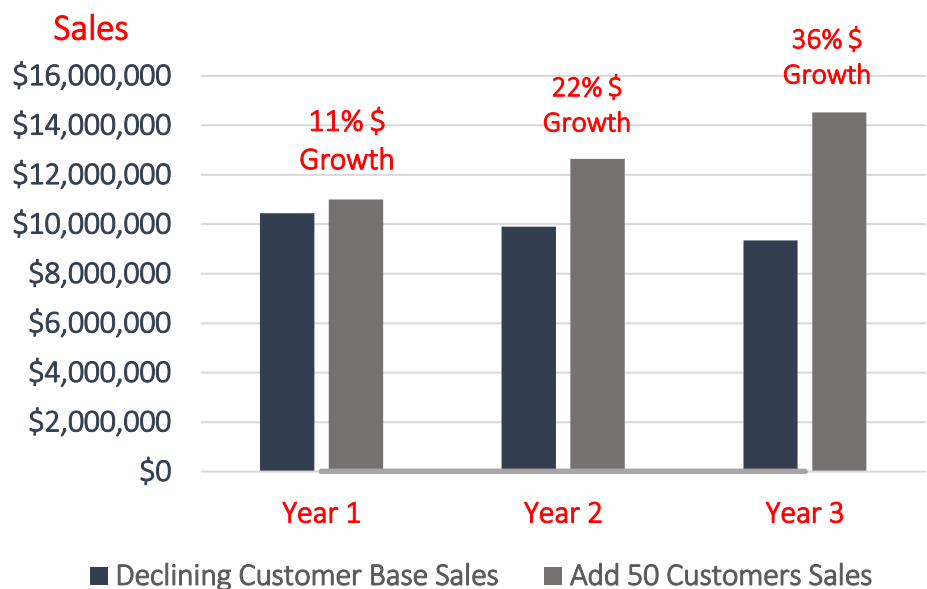
While retaining existing customers is critical for building long-term relationships and generating repeat business, sustainable business success is dependent upon new customer acquisition.

NEW CUSTOMERS ARE THE LIFEBLOOD OF BUSINESS

Companies sometimes fall into a static phase where too much reliance is placed upon selling over and over again to the same customers. This can be a recipe for disaster. Without new customers pumping life into drooping sales, companies cannot continue to grow and remain competitive.

In this example, Company A has a customer base of 500 that is declining by 5% per year. Annual sales are \$20,000 per customer, with a 10% annual sales growth.

By acquiring 50 new customers each year, sales steadily increase and grow by 36% in Year 3. Without new customers, even with sales growth, total sales will decline by over 10.5% in the third year.



While retaining existing customers is critical for building long-term relationships and generating repeat business, sustainable business success is dependent upon new customer acquisition.

Through marketing convergence planning, sales and marketing can work together to create a roadmap to identify, attract, engage, and convert prospects into customers.

GROUP THINK – HOW MUCH IS ENOUGH?

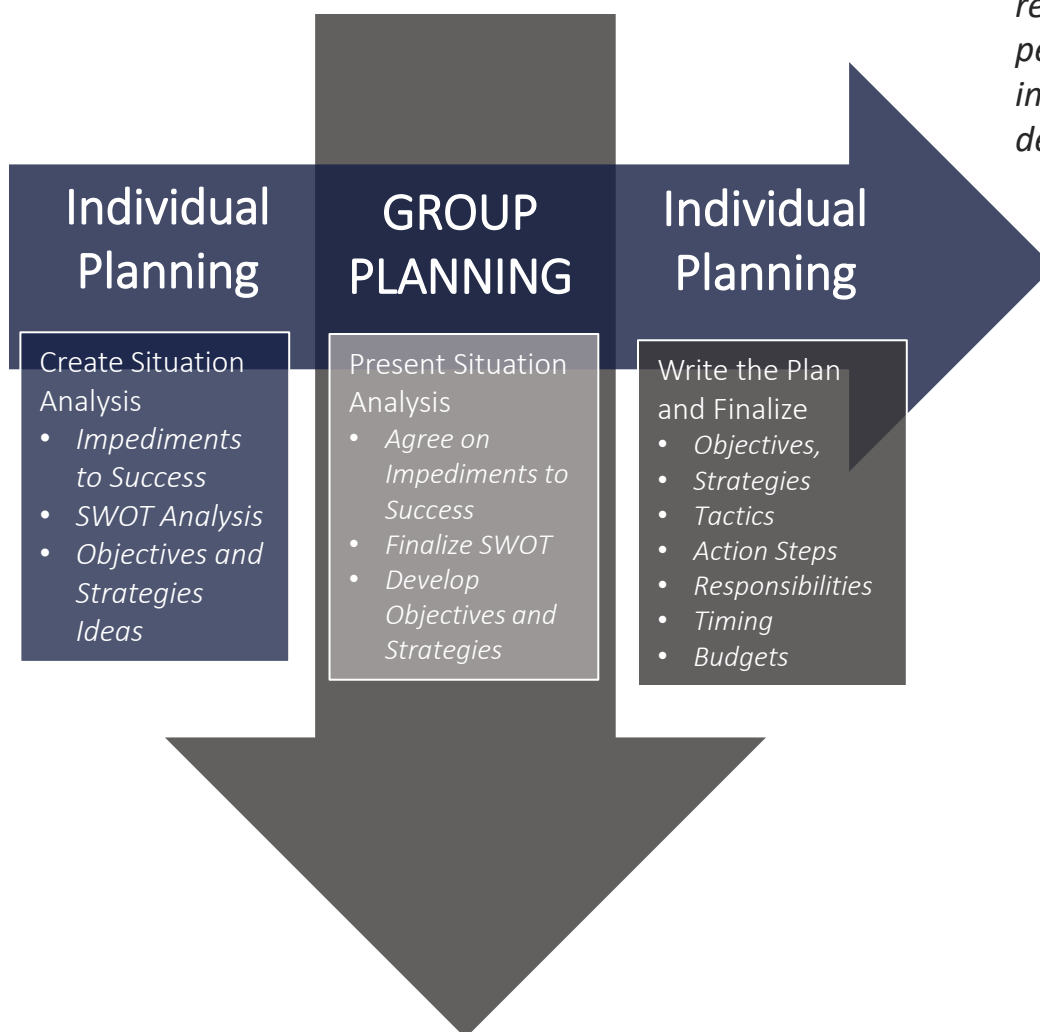
There is much debate on the effectiveness of brainstorming in the marketing planning process. Admittedly, individual thinking may sometimes offer better ideas.

However, there are advantages to leveraging the collective intelligence rendered by multiple people being included in plan development. Group problem-solving and freewheeling discussions can stimulate creative thinking and provide immediate feedback on ideas. Buy-in and personal involvement through group planning can be very important and can affect how the final plan is accepted within the company.

This guidebook emphasizes the need for both individual and group thinking in the planning process.

Introduction to Marketing Planning Using Marketing Convergence

...there are advantages to leveraging the collective intelligence rendered by multiple people being included in plan development.



Introduction to Marketing Planning Using Marketing Convergence

Theodore Levitt argues that companies are often too engaged in producing goods or services and don't spend enough time understanding what customers want or need. Therefore, he "encouraged executives to switch from a production orientation to a consumer orientation."

⁴ Theodore Levitt, *"Marketing Myopia,"* Harvard Business Review Press, 1960

WHY DO THIS PLANNING?

"Marketing myopia"⁴ was a term invented by the late Theodore Levitt at the Harvard Business School. It refers to companies having a nearsighted focus on selling products and services, rather than seeing the "big picture" of what consumers want.

Levitt argues that companies are often too engaged in producing goods or services and don't spend enough time understanding what customers want or need. Therefore, he "encouraged executives to switch from a production orientation to a consumer orientation." As Levitt used to tell his students, "People don't want a quarter-inch drill. They want a quarter-inch hole!"

Within a company, the sales team is closest to customers and many times has a better understanding of who and where they are, along with their needs. Sales must therefore participate in the planning process with marketing to create effective marketing plans.

This comprehensive guidebook presents a systematic approach to developing an effective marketing plan by aligning sales and marketing, establishing agreement among stakeholders, and executing a structured planning procedure. The outcome is a well-crafted marketing plan encompassing objectives, strategies, and tactics to meet customer requirements while generating more customer leads and incremental revenue.

WHO SHOULD USE THIS GUIDEBOOK?

Professional marketing planners
and planning meeting facilitators

Marketing managers, sales managers,
and advertising managers

Advertising and marketing agencies, and consultants
creating marketing plans for clients

Small business owners needing a formalized
approach to marketing planning

KEY TAKEAWAYS FROM THE PLANNING

- Developing actionable marketing objectives, strategies, and tactics that will generate leads and sales
- Identifying key metrics for measuring success with your marketing
- A better understanding of the roles of sales and marketing in the strategic marketing planning process
- A clear assessment of your company, its products, and the competitive landscape
- More concise knowledge of your customer base and customers you would like to have

Introduction to Marketing Planning Using Marketing Convergence

WHAT'S INCLUDED WITH THIS GUIDEBOOK?

- Detailed instructions and examples on how to converge sales and marketing teams and align messaging and content across traditional and digital channels to build a strategic marketing plan that can generate incremental revenue and customer leads
- Descriptions of facilitator and team member roles
- Worksheets for building the situation analysis, preplanning meeting, tactics, communications, final strategic marketing plan, and executive summary
- Planning checklist
- Customizable slide deck and a planning meeting notes worksheet to help the facilitator guide the planning meeting and document discussions and decisions
- Examples of objectives and strategies, and over 100 sample marketing tactics for various types of businesses

Key Takeaways from the planning include the development of actionable marketing objectives, strategies, and tactics that will generate leads and sales, along with identifying key metrics for measuring success with your marketing.



MARKETING CONVERGENCE PLANNING

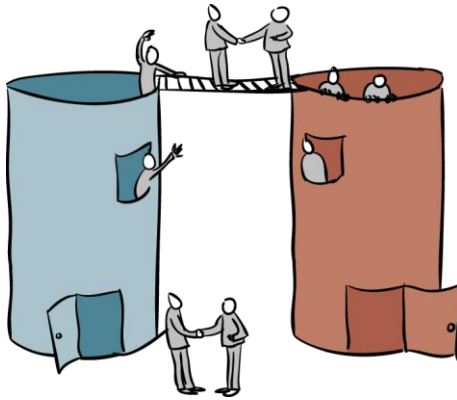
"Sales and marketing alignment starts with giving both teams common goals. While the two teams' jobs will always be different, they need to have shared high-level goals that lead to pipeline and revenue targets."

"5 Strategies for Successful Marketing and Sales Alignment," American Marketing Association



IDENTIFY BARRIERS AND BEGIN TO BRIDGE SILOS

Sales and marketing departments often work in “silos.” While the engagement of sales and marketing can be beneficial for businesses, there are often barriers preventing the two functions from working together effectively in the planning process.



Lack of Communication

When sales and marketing teams operate in silos, they may not share information about customer feedback, sales data, or marketing campaigns. This can lead to misaligned strategies and missed growth opportunities.

Different Metrics and Goals

Sales and marketing teams often have different metrics and goals, which can create conflicting priorities.

Sales Priority Closing deals and reaching sales targets

Marketing Priority Creating brand and product awareness

Lack of Understanding

Sales and marketing teams may have different perspectives on customer needs and preferences.

Sales Priority Meeting specific customer needs and overcoming objections

Marketing Priority Creating messaging for a wide or targeted audience

Lack of Integration

Sales and marketing tools, such as CRM systems, may not be fully integrated, which can create inefficiencies and make it difficult to measure the impact of marketing campaigns on sales.

Bridging the Barriers to Marketing Convergence

Sales and marketing teams may have different perspectives on customer needs and preferences, which can create misunderstandings and misalignment.

Bridging the Barriers to Marketing Convergence

“What we’ve got here is a failure to communicate.”

“Cool Hand Luke” – Warner Bros. – Seven Arts, 1967

Sometimes, doomed-to-failure marketing moves can be attributed to personal hubris and overconfidence. Too much “me” in a campaign and more “we” by using convergence techniques can help businesses minimize risk.

FAILING TO COMMUNICATE – (IN)FAMOUS MARKETING DECISIONS

The business world landscape is littered with hundreds of marketing failures, some happening on a gigantic scale, often costing the companies millions. Many of these mistakes could have been minimized through convergence of communications between sales and marketing.

Examples

Bud Lite Beer In 2023, Marketing at Bud Lite decided to engage the brand with a controversial social media influencer. Although the campaign was very limited, the resulting backlash by conservative media and some customer segments was swift. Anheuser-Busch is still working hard to recover its market share and lost sales.

New Coke In 1985, Coca-Cola decided to terminate its most popular soft drink and replace it with a formula that it would market as New Coke. The result was a brand failure. The new formula was sweeter and smoother than the original, and many people hated it. It was not long before the original was brought back.

J.C. Penney In 2011, J.C. Penney implemented new advertising, logo, and store designs without significant customer input. By eliminating private labels and its popular coupons in favor of everyday low prices, the new strategy confused customers and led to a 25% drop in sales in one year.

The Take-Away

It’s easy to second guess a well-intentioned marketing strategy, but in each of these cases, it seems obvious, on the surface, that input from the sales teams, distributors, and more in-depth testing and customer input could have prevented missteps of such large proportions.

Sometimes, doomed-to-failure marketing moves can be attributed to personal hubris and overconfidence. Too much “me” in the planning of campaigns and more “we” by using convergence techniques can help minimize risk.

MARKETING CONVERGENCE STRATEGIC PLANNING, STEP-BY-STEP

There are eight steps required to develop and implement a complete marketing plan using marketing convergence techniques. Before beginning, companies must be committed to the process and allocate the necessary time and people resources to complete the planning.



The Marketing Convergence Strategic Planning Process

Before beginning, companies must be committed to the process and allocate the necessary time and resources to complete the planning.

See Addendum: *Planning Meeting Checklist, Page 25*

1. PLANNING AND ORGANIZATION

First, the sales and marketing managers jointly develop statements about the overall purpose and goals of the planning and a general timeline for completing the planning.

Purpose of the Marketing Plan Example

“Support our sales efforts through effective marketing programs which build customer retention, acquire and qualify customer leads, and generate more revenue.”

The Marketing Convergence Strategic Planning Process

Team members are required to be an active participant in the planning and not just an attendee.

From sales, salespeople with seasoned experience collaborating and facing directly with customers...

From marketing, creative and experienced marketing professionals with a can-do attitude...

Overall Goal of the Marketing Plan Example

“Expand our market share by increasing sales to current customers and creating conquest sales opportunities.”

Second, the marketing and sales managers identify the planning meeting facilitator and six to eight people from sales and marketing who will comprise the collaborative planning team to develop the marketing plan.

Selecting the Planning Team Members

Team members are required to be an active participant in the planning and not just an attendee.

From sales, salespeople with seasoned experience collaborating and facing directly with customers are important to have on the team. In other words, people with feet on the street experience work best. They can bring real world perspectives to the planning.

From marketing, creative and experienced marketing professionals with a can-do attitude and open to innovative ideas can be solid contributors to the planning.

See Addendum: Planning Team Member Qualities, Page 26

Third-Party Participants

If the company uses an advertising or marketing agency to help develop and implement its marketing, then representatives from the agency should participate in the planning meeting discussions. The facilitator may be the lead or part of the agency’s account team for the company.

Senior Managers May Stifle Open Discussions

Occasionally, senior managers may want to participate in or observe the planning sessions. This is usually an extraordinarily bad idea as their presence will usually stifle open discussions and potentially creative opinions that may be contrary to the company’s current direction.

Facilitator Role – ‘Guided Discovery’

The facilitator must be thoroughly familiar with the planning process and able to lead team members in group discussions through “guided discovery.” The facilitator may come from outside the company but should have a strong familiarity with the company, its products, and markets.

See Addendum: Role of the Facilitator in Planning, Page 27

2. TRAINING FOR FACILITATORS AND PLANNERS

With training, meeting facilitators and planners can improve their marketing and planning knowledge and skills to be better equipped to organize and conduct marketing convergence strategic planning.

Interactive online training made up of five lessons and tests is available at www.convergencestrategies.com.

Before beginning the training lessons and tests, the facilitator and planner should thoroughly study this guidebook.

See Addendum: Interactive Online Training for Marketing Planners and Facilitators, Page 28

3. FACILITATOR CONDUCTS THE PREPLANNING MEETING

Guided by the facilitator, the planning team meets for a preplanning session to discuss the creation of the situation analysis and the preplanning worksheets.

See Addendum: Situation Analysis Worksheet, Page 33

Team members are each given a part of the situation analysis to complete individually or with others. It includes secondary information and primary research on the external and internal factors that affect the company, its products, customers, and competition.



The Marketing Convergence Strategic Planning Process

Each team member is given a part of the situation analysis to complete. The situation analysis includes secondary information and primary research on the external and internal factors that affect the company, its products, customers, and competition.

The Marketing Convergence Strategic Planning Process

Additionally, each team member must complete their preplanning worksheet before the planning meeting. This allows each person time to use their creativity to form their thoughts about each area that will be discussed in the planning meeting.

Additionally, each team member must complete their preplanning worksheet before the planning meeting. This allows each person time to use their creativity to form their thoughts about areas planned for discussion in the meeting.

See Addendum: Preplanning Worksheet, Page 37

Completing the preplanning worksheets and the situation analysis may take several weeks because additional time may be required for research or surveys.

All information and research findings for the situation analysis are compiled into a final document by the facilitator, agency, or appointed team members. The final situation analysis is given to team members for study before the planning meeting.

4. STRATEGIC PLANNING MEETING

After the team members have had time to study the situation analysis and complete their preplanning worksheet, the facilitator assembles the planning team, preferably off-site, for a two-day or more planning meeting.

See Addendum: Planning Session PowerPoint, Page 43

Tools the facilitator should use include flip charts with markers and PowerPoint slides (see sample slide deck in the Addendum) to help guide the team through the planning.

The meeting should begin with introductions, an agenda review, and a Q&A period. It is sometimes helpful to have a brief period of mental exercises (see planning PowerPoint) so team members may more effectively engage.

Providing comfortable seating, regular breaks, coffee and drinks, and snacks are all important in helping to keep the team members focused and the discussions lively.

Confidentiality

Team members must understand that any comments they make during the planning sessions are confidential and their names will not be associated with any recommendations.

Planning Meeting Notes

The facilitator or marketing planner appoints an individual from marketing or the advertising/marketing agency to take meeting notes using the planning meeting notes worksheet.

See Addendum: Planning Meeting Notes Worksheet, Page 61

Create Sub-Teams

To help break down the sales and marketing silos, the facilitator divides team members into two sub-teams, each made up of individuals representing both sales and marketing.

Sub-team members should be carefully selected based on their personalities and compatibility with one another. A separate meeting room may be required for use by one of the sub-teams during their discussions. A leader should be selected for each sub-team.

The facilitator guides the discussions, prompts team building and participation, and charts all discussion points on a flip chart and/or whiteboard. Flip chart pages are very useful because the completed pages can be taped or stuck to the walls for reference during the discussions.

To encourage participation and input by each team member, the sub-teams may work on a problem or situation together and separate from the other team. They report back to the entire team and present their findings.

A. Present the Situation Analysis

Each team member responsible for a specific area of information gathering or research presents the findings to other team members. Comments and questions raised by team members are discussed and relevant points are charted.

B. Discover Impediments to Success

From the preplanning worksheet, each team member presents their list of impediments to marketing success. The facilitator charts the responses and at least the top five are ranked by the entire team. The ranked impediments to the marketing success list are useful later in the planning as a reference to gauge how well the marketing objectives and strategies address each impediment.

C. Determine Sales Goals

The team reviews the sales goals from the situation analysis, by product(s)/product segment(s) and market(s), from information in the situation analysis. The facilitator charts their agreements.

The Marketing Convergence Strategic Planning Process

The facilitator guides the discussions, prompts team building and participation and charts all discussion points on a flip chart and/or white boards. Flip chart pages are very useful because the completed pages can be taped or stuck to the walls of the room for reference by the facilitator and team members.

The Marketing Convergence Strategic Planning Process

“Marketing strategies provide the detailed blueprint on how to achieve the marketing objective. Strategies list which steps to take, specific action necessary to achieve each step and the expected timeline by which to accomplish each stage. While the management team is responsible for devising the marketing objectives, workers at the supervisory level and below are in charge of completing actual steps.”

Charles Lamb, Carl McDaniel, Joseph Hair
“Essentials of Marketing,”
Cengage Learning,
Seventh Edition, 2011

D. Conduct a SWOT Analysis

SWOT analysis is essential to the planning process in providing actionable insights into product, price, place (distribution), and promotion (four Ps) for your company. During discussions, input from team members can be used to form strategies to leverage strengths, mitigate weaknesses, capitalize on opportunities, and address threats.

The facilitator guides the team through the discussion and charts the team members’ responses.

E. Develop the Marketing Convergence Objectives and Strategies

Guided by the facilitator the team develops the marketing convergence objectives and strategies. Each team member should reference the ideas they developed individually from their preplanning worksheet.

Definitions – Objectives, Strategies, Tactics

The three familiar words – objectives, strategies, tactics – used in most marketing plans are often misunderstood and confused. For this planning, they are defined here.

Marketing objectives are specific and measurable targets that provide a clear direction for marketing activities and serve as benchmarks for evaluating success. Objectives must be SMART⁵ – designed to advance revenue gains from customer conquest and retention.



Converging sales and marketing functions in the strategic planning process leverages customer data and insights from sales with marketing's expertise in aligning messaging and content across traditional and digital channels. This concept isn't just about consistency; it's about creating a unified strategy that drives measurable results, from increased sales to stronger customer retention.

MARKETING CONVERGENCE SOLUTIONS

Marketing Convergence Solutions is dedicated to helping companies unite marketing and sales teams to create a consistent brand message across all channels, both traditional and digital. This unified strategy improves the customer experience by providing seamless interactions from initial contact to purchase.

Our detailed strategic planning processes can help companies develop marketing objectives, strategies, and tactics that deliver improved sales results that meet or exceed key revenue generation goals.

Go to our website, www.convergencestrategies.com, to access additional marketing planning tools including:

- Online interactive training for marketing planners and planning meeting facilitators
- Marketing planning worksheets for building the situation analysis, preplanning meeting, tactics, communications, final strategic marketing plan, and executive summary
- A customizable slide deck and a planning meeting notes worksheet to help the facilitator guide the planning meeting and document discussions and decisions

www.convergencestrategies.com

Info@convergencestrategies.com

~NOTES~

IMPROVE YOUR STRATEGIC MARKETING PLANNING KNOWLEDGE

More information and resources to help you learn about strategic planning using marketing convergence solutions are available in the complete planning package at www.convergencestrategies.com. The planning package includes a PDF of this guidebook, seven interactive planning worksheets, a customizable slide deck for presenters, and a five-lesson online interactive training course.

MARKETING CONVERGENCE SOLUTIONS

BLOGMENU

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FREE PREVIEW LESSON 5 AND QUIZ


PREVIEW A FILLABLE WORKSHEET FORM




Casper's Blog



Keep Your Customers from Walking Away



Why Do Our Accountants Hate Us?



Reverse Engineer Your Marketing Plan by Establishing End Goals First

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WHAT IS MARKETING CONVERGENCE?

Aligning messaging and content across traditional and digital channels while fostering collaboration between marketing and sales teams may offer the best option to develop highly focused marketing plans designed to “move the sales needle.” Termed “marketing convergence,” this process is fully explained in this new innovative marketing planning guidebook from Marketing Convergence Solutions.

The guidebook is part of a complete planning package showing how marketing managers can develop a well-crafted strategic marketing plan encompassing objectives, strategies, and tactics that meet customer requirements, improve the customer experience, and increase sales, leads, and customer retention.

Easy to understand and implement, the comprehensive planning package includes online interactive facilitator and marketing planner training, interactive planning worksheets, a customizable slide deck for planning sessions, and examples of integrated marketing objectives, strategies, and tactics.

"Sales and marketing alignment starts with giving both teams common goals. While the two teams' jobs will always be different, they need to have shared high-level goals that lead to pipeline and revenue targets."

5 Strategies for Successful Marketing and Sales Alignment - American Marketing Association

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