

MARKETING PLANNING GUIDEBOOK:

A Practical How-To Guide
and Training 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



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Marketing Convergence Strategic Planning

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Preface to Marketing Convergence

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

BEFORE BEGINNING, AN EXPLANATION IS IN ORDER

First, this guidebook is non-academic. The writer assumes readers are well-practiced and educated marketing, advertising, sales, and business professionals.

The marketing planning ideas and approaches described here are, however, 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.

The writer’s intent is to help businesses develop a practical and actionable strategic roadmap to achieving marketing objectives that attract new customers, retain current customers, and drive business growth.

There are many well-written marketing guidebooks authored by academics that go “in-depth” with how to plan, definitions of marketing components, and introducing 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 the “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 mis-step companies sometimes make is leaving the marketing planning up to “professional planners,” whether on staff or brought in for the purpose of 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 pages that follow will show the reader 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.

Introduction to Marketing Convergence

Today, 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?

There are many definitions and layered meanings for Marketing Convergence, but for the purposes of this guidebook, Marketing Convergence refers to the bridging of silos between marketing and sales functions and aligning their planning efforts to achieve common goals for growth in sales and qualified customer leads.

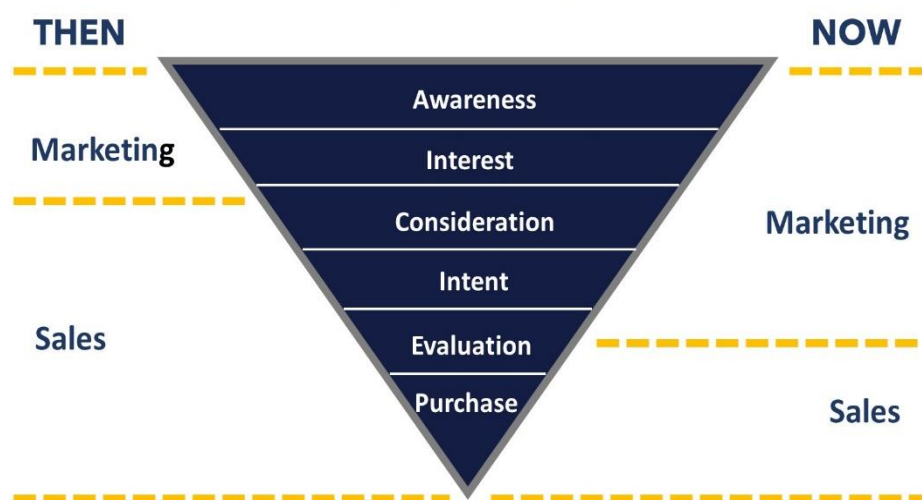
Traditionally, marketing was given the task of developing awareness and interest in products and brands through mass communications and direct marketing. Sales had the job of finding and qualifying leads and turning "interest" into "consideration" and finally to a "purchase."

Today, 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 sales to the purchase decision does not diminish the role of sales. It helps maximize their efficiency by providing warmer and more qualified leads.

The New Marketing Convergence Sales Funnel



Steve Patrizi's, "The [New Marketing & Sales Funnel](#)," Steve Patrizi's Blog, 2012

¹Hubspot.com, [The Power of Smarketing](#), Web Guide

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Introduction to 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.

BRIDGING SALES AND MARKETING FUNCTIONS THROUGH MARKETING CONVERGENCE STRATEGIC PLANNING

A key measure of marketing effectiveness is how well a company's marketing objectives and strategies 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 programs are mostly designed to improve and measure increased impressions, higher brand awareness, or improved customer satisfaction.

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

For the planning process to be successful, sales and marketing planning team members must “buy-in” to the convergence planning process and then participate in a facilitated, collaborative, and exercise-based planning process.

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

Role of Marketing 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 Convergence

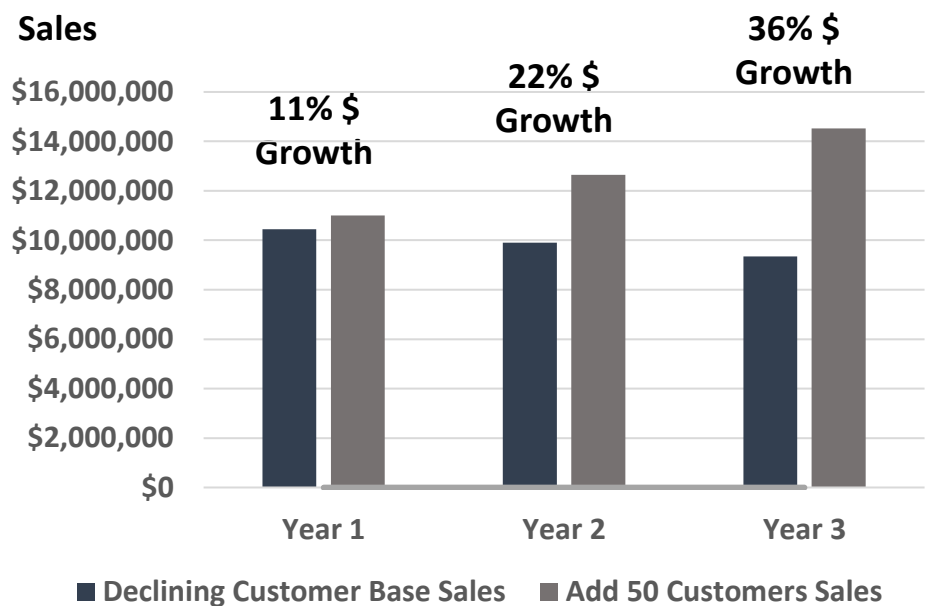
While retaining existing customers is critical for building long-term relationships and generating repeat business, sustainable business success is dependent upon new customer acquisition.

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 customer base. 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 additional customers each year, sales steadily increase and grow by 36% in Year 3. Without new customer growth, total sales would have declined 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.

Introduction to Marketing Convergence

Admittedly, individual thinking may sometimes offer better ideas.

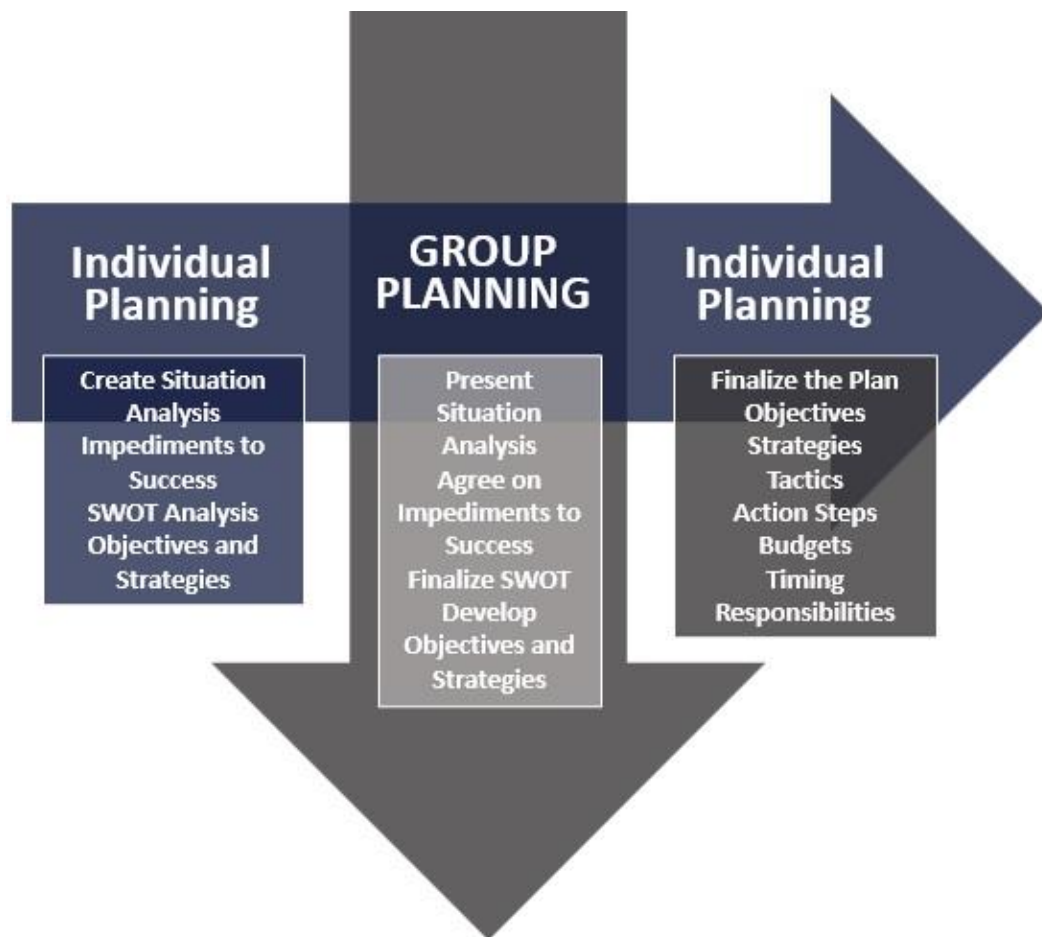
However, there are advantages to leveraging the “collective intelligence” rendered by multiple people being included in plan development.

GROUP-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 planning guidebook emphasizes the need for both individual and group thinking.



Introduction to Marketing Convergence

Theodore Levitt argues that companies are often too focused on 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."

WHY DO THIS PLANNING?

["Marketing myopia"](#)² 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 focused on 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 the customer 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 develop 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 meeting customer requirements while generating more customer leads and incremental revenue.

WHO SHOULD USE THIS GUIDEBOOK?

Any business stakeholder wanting their marketing to deliver measurable results including:

- 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

² Theodore Levitt, ["Marketing Myopia,"](#) Harvard Business Review Press, 1960

Introduction to Marketing Convergence

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

KEY TAKEAWAYS FROM THE PLANNING

- Development of 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

WHAT'S INCLUDED IN THIS GUIDEBOOK?

- A five lesson training course for planners and facilitators
- Step-by-Step instructions, examples, and prompts on how to converge sales and marketing resources and people to build a strategic marketing plan designed to generate incremental revenue and customer leads
- Descriptions of facilitator and team member roles in the planning
- Worksheets for building the Situation Analysis, Preplanning Meeting, Tactics – Best Practices, Marketing Plan, Executive Summary, and the Final Marketing Plan
- Planning Checklist
- Customizable PowerPoint presentation to help the facilitator guide planning meeting discussions
- Examples of objectives and strategies which can be used in the marketing plan
- Over 100 sample marketing convergence tactics

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](#)

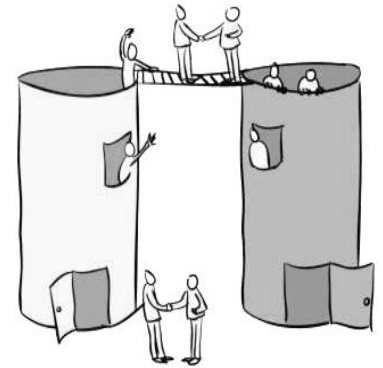


Bridging the Barriers to Marketing Convergence

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

IDENTIFY BARRIERS AND BEGIN TO BRIDGE SILOS

Sales and marketing often work in “silos.” While the engagement of Sales and Marketing can be beneficial for businesses, there are often barriers preventing the two departments 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 opportunities for growth.

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

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

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

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 minimized or eliminated through a better convergence of communications between sales and marketing functions.

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. Parent company Anheuser-Busch is still working hard to recover 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 mis-steps of such large proportions as these examples.

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.

The Marketing Convergence Strategic Planning Process

MARKETING CONVERGENCE STRATEGIC PLANNING, STEP-BY-STEP

There are nine 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 resources to complete the planning.



1. PLANNING AND ORGANIZATION

First, the sales and marketing managers jointly develop a statement about the overall goals and purpose 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 which 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 32

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 consider participating in the planning meeting discussions. The facilitator may be the lead or part of the agency’s account team for the company.



Converging sales and marketing functions in the strategic planning process leverages customer data and insights from sales with marketing's expertise with communications and messaging to develop marketing objectives and strategies which deliver sales results.

MARKETING CONVERGENCE SOLUTIONS

[Marketing Convergence Solutions](#) is dedicated to helping companies generate measurable incremental revenue by combining customer data and insights from sales with marketing's expertise in communications, messaging, and lead generation.

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

We offer consulting encompassing a wide spectrum of marketing services including:

- Strategic marketing convergence planning
- Facilitator and planner training
- Marketing studies, surveys, and analysis
- Strategic marketing plan development
- Marketing program design