

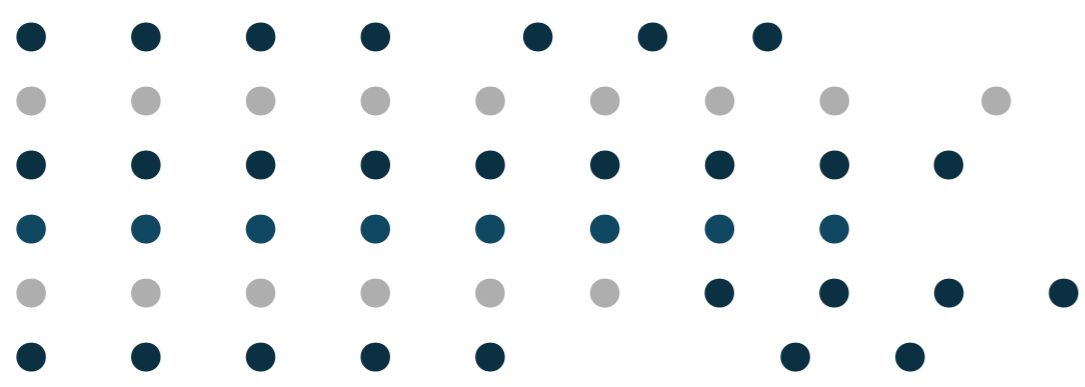


# **COLLABORATE or DIE\***

## The Art of Embracing Convergence in Marketing Planning

**Marketing Convergence Solutions**  
[www.ConvergenceStrategies.com](http://www.ConvergenceStrategies.com)

*\*Apologies to Peter Drucker*



# Enhance Your Creativity and Innovation by Leveraging Sales and Marketing Synergies

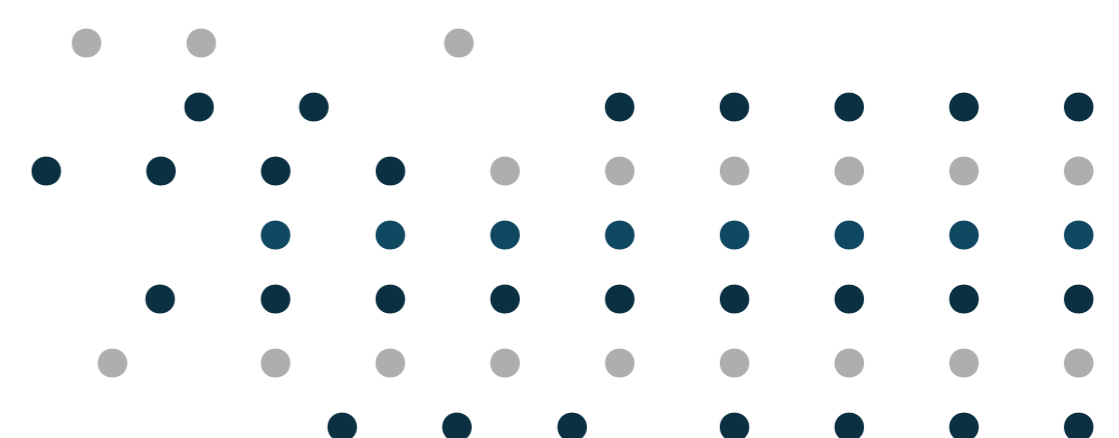
While marketing professionals possess valuable skills, they may sometimes fail to take advantage of the critical insights into products, customer needs, and competitive dynamics possessed by others in their company.

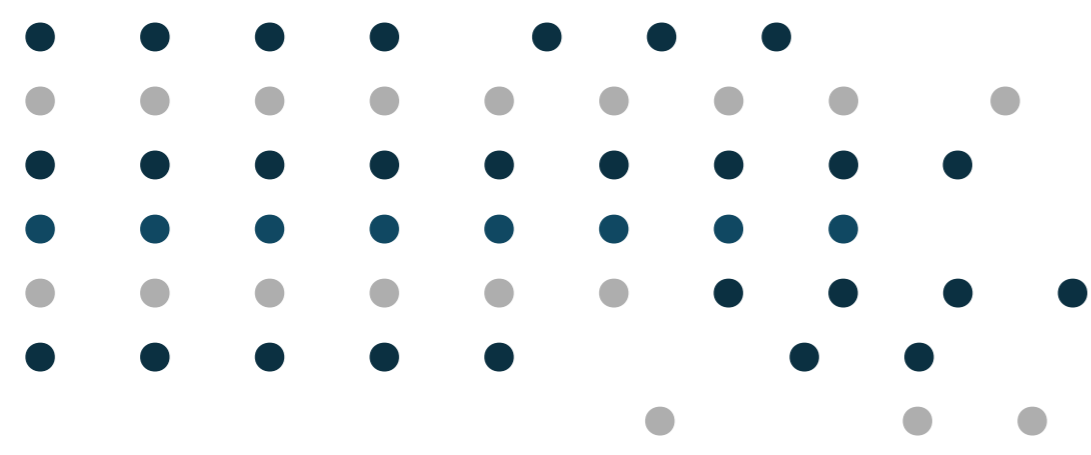
However, combining their own marketing expertise with realities from on-the-ground sales teams can empower companies to craft highly effective, success-driven marketing objectives and strategies.

## Break Down the Silos

To bridge this gap, businesses can embrace marketing convergence, a transformative approach that aligns sales and marketing teams, dismantles silos, and ensures unified messaging and content across all channels.

By integrating sales-driven insights into marketing strategies, businesses can enhance their market responsiveness and drive long-term success.



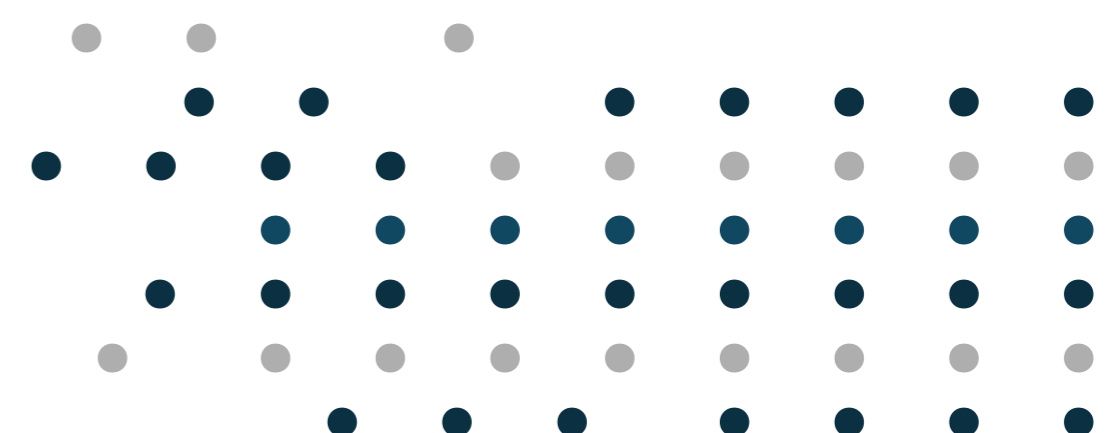


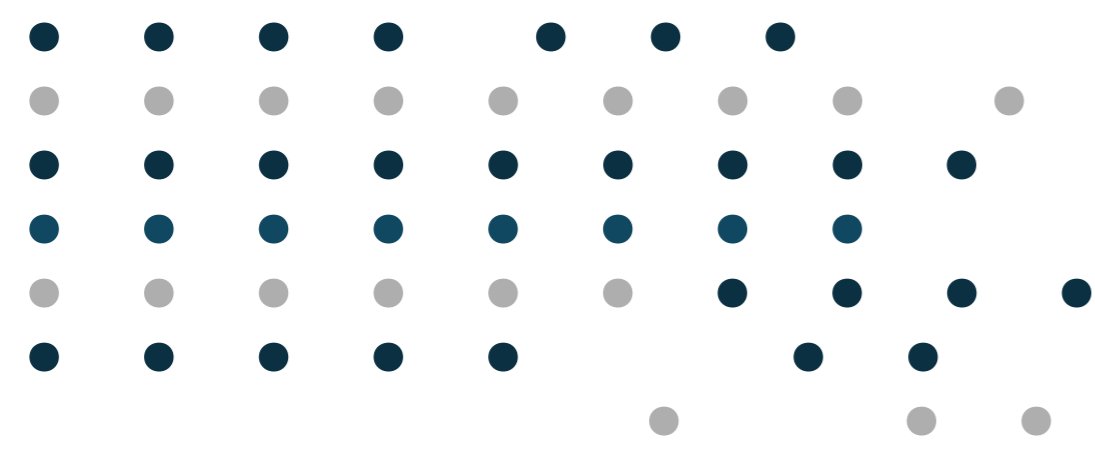
## Marketing Convergence Benefits\*

- Organizations with tightly aligned sales and marketing functions enjoy 36% higher customer retention rates ([source](#)).
- Aligning sales and marketing also leads to 38% higher sales win rates ([source](#)).
- Sales and marketing alignment can help your company become 67% better at closing deals ([source](#)).
- Aligning both departments can help generate 209% more revenue from marketing ([source](#)).
- B2B organizations with tightly aligned sales and marketing operations achieve 24% faster three-year revenue growth and 27% faster three-year profit growth ([source](#)).



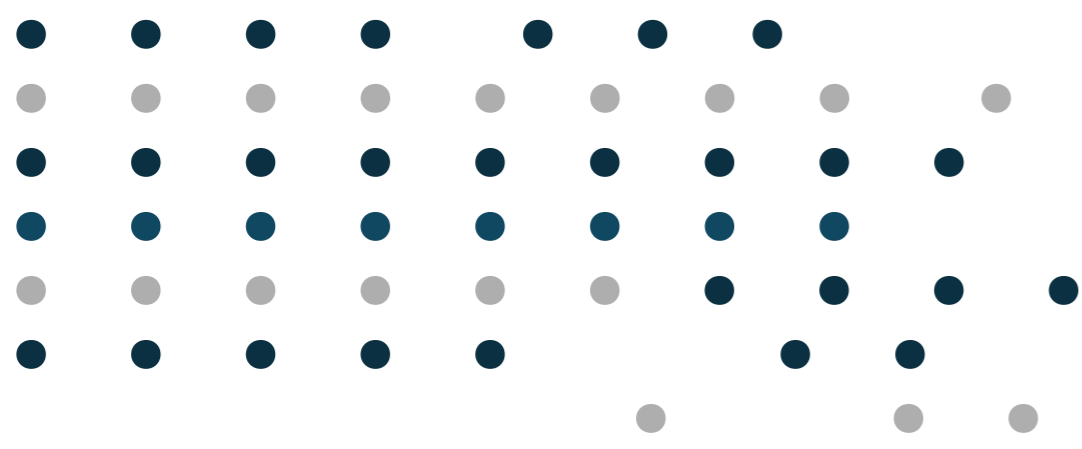
\*More benefits can be found at: “*20 Sales and Marketing Alignment Statistics*,” The Pipeline, Zoominfo.com





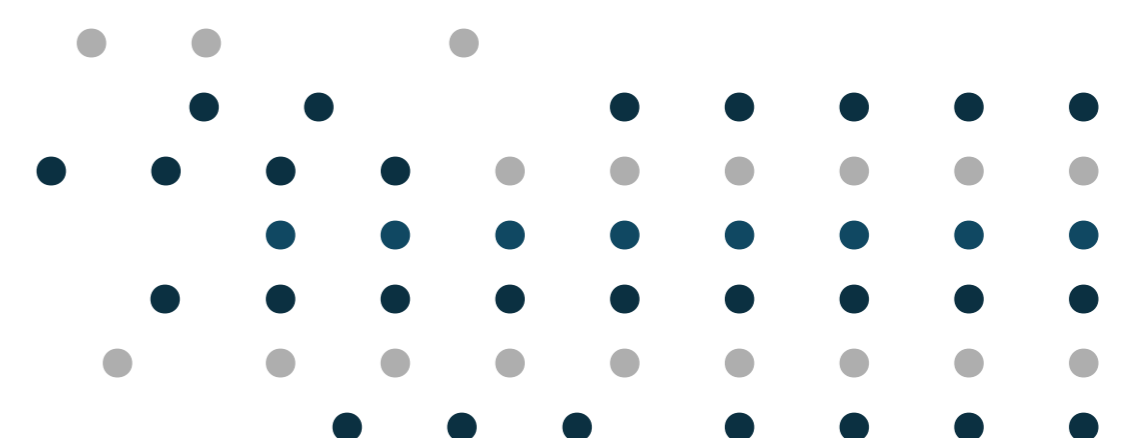
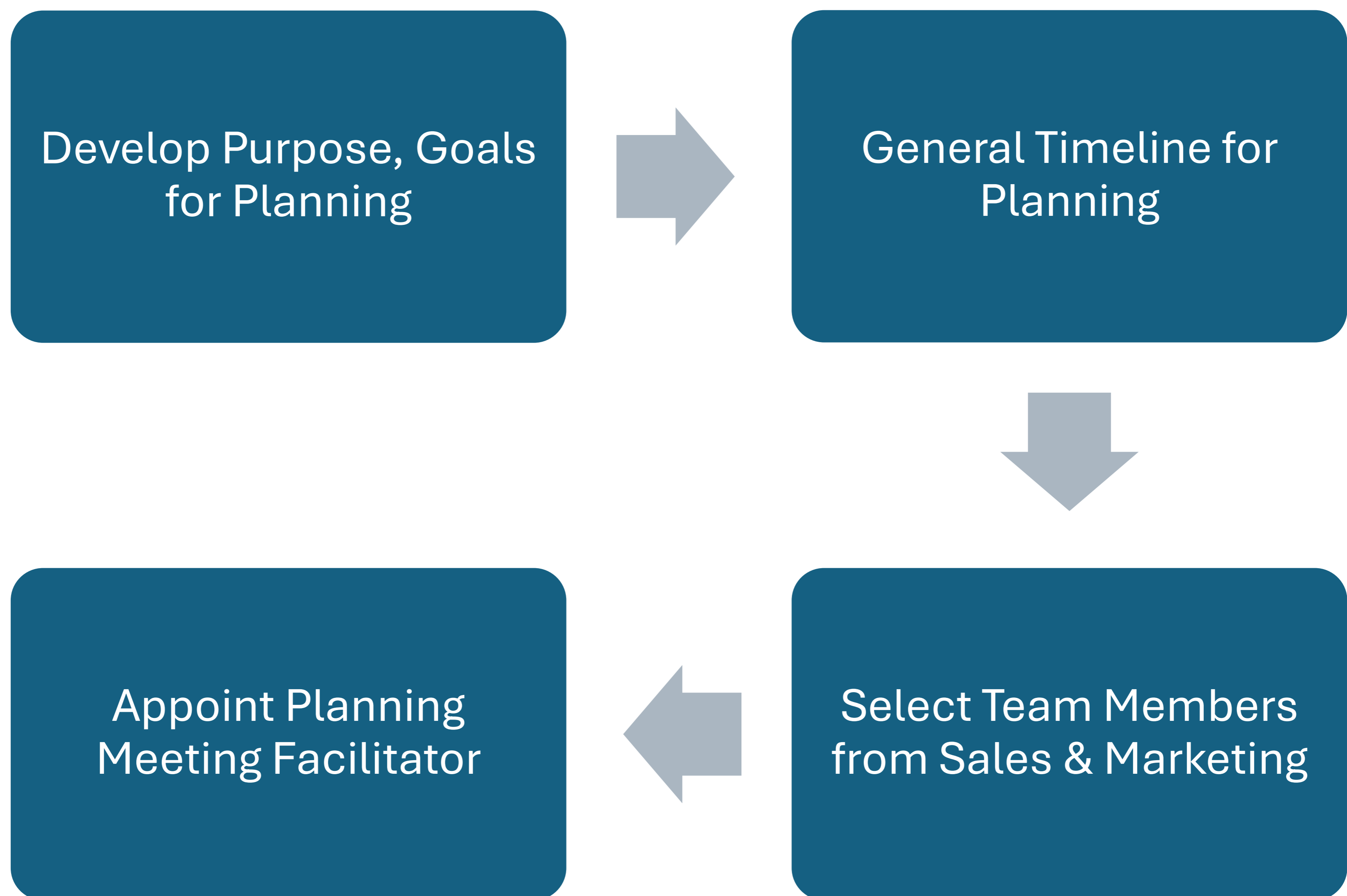
# Find Details and Instructions on an 8-Step Marketing Convergence Planning Process at [www.ConvergenceStrategies.com](http://www.ConvergenceStrategies.com)

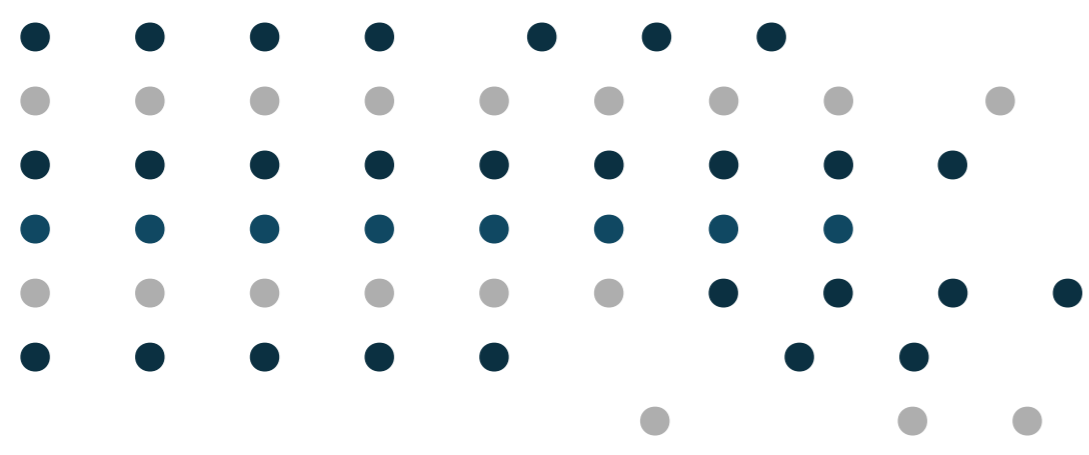




## Step 1. Planning and Organization

Sales and marketing managers collaborate to develop the internal planning process, select team members, and appoint the facilitator. The facilitator is key to successful planning and must be able to confidently lead the team through “guided discovery.”





## Step 2. Appoint a Facilitator with the Knowledge and Training to Lead

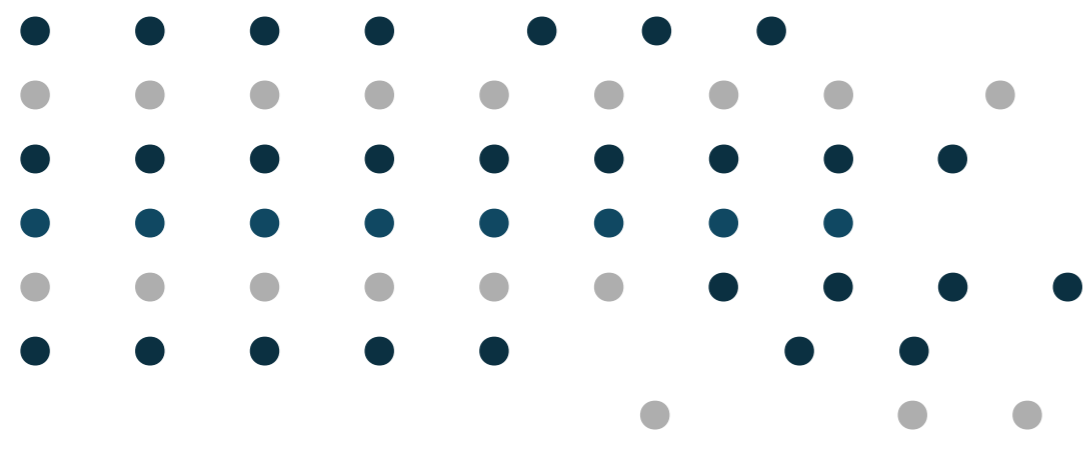
By offering expertise and leadership skills, the facilitator supports the planning team in developing the plan efficiently and effectively.



The facilitator should be thoroughly familiar with the planning processes offered in the guidebook and deeply understand the company and its products.

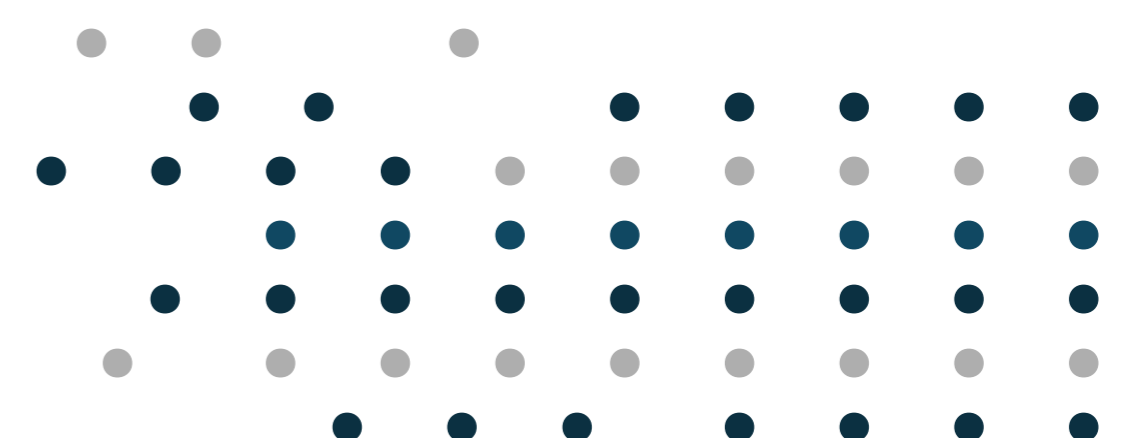
Online training and other resources for facilitators are available at [www.ConvergenceStrategies.com](http://www.ConvergenceStrategies.com).

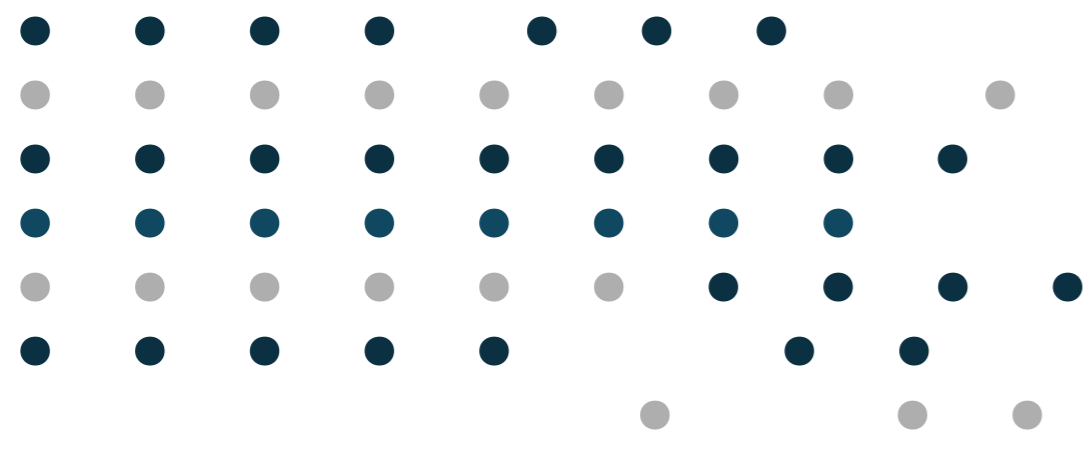




## Step 3. The Facilitator Organizes and Conducts a Team Preplanning Meeting

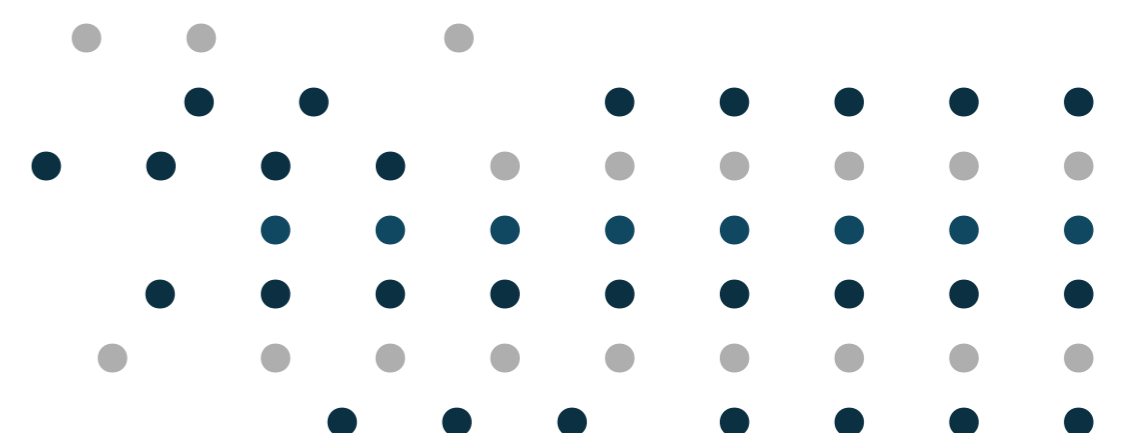
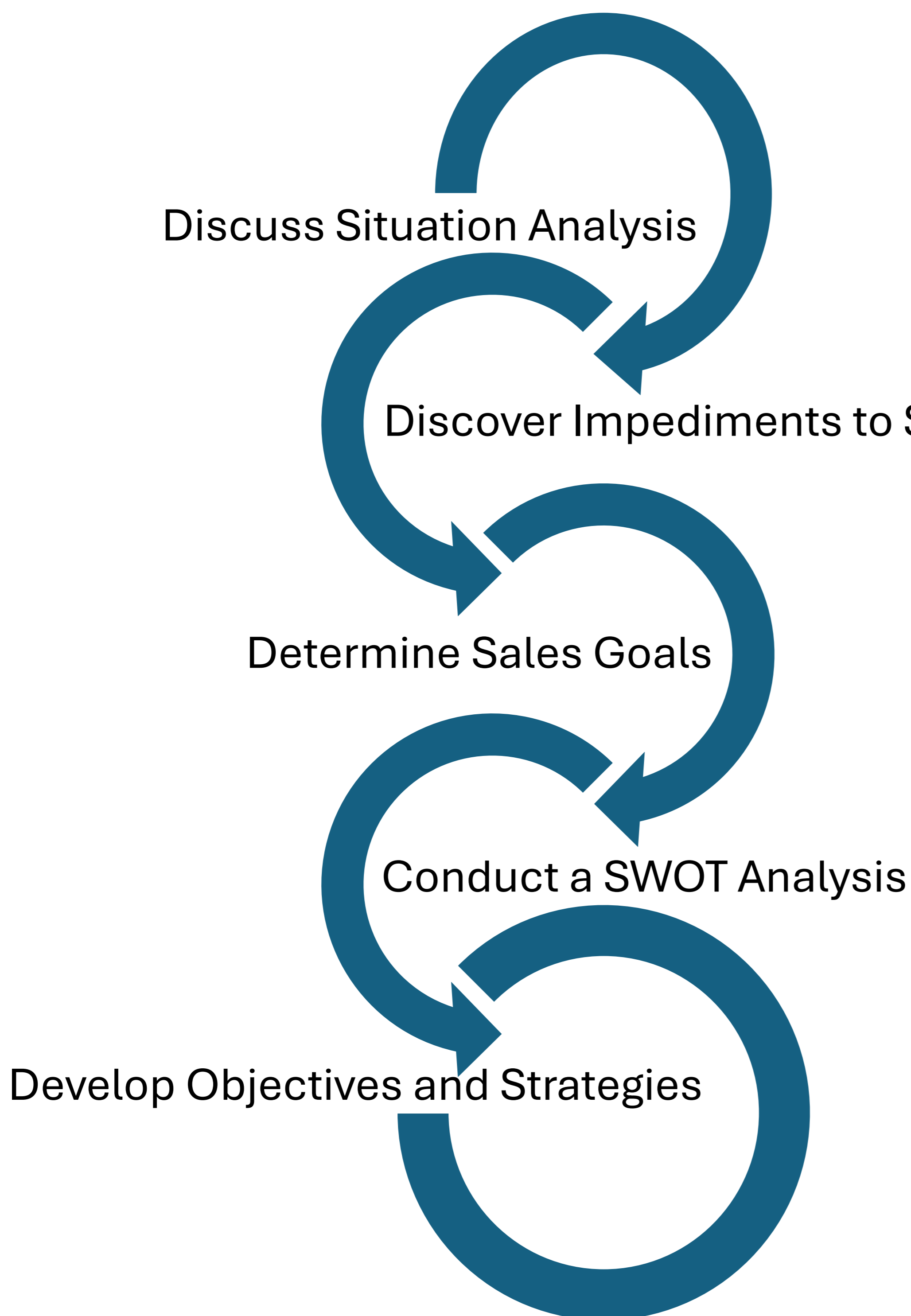
Team members meet in a facilitated preplanning meeting to create the situation analysis and planning worksheets, both important documents that guide the team members in creating the final strategic plan.

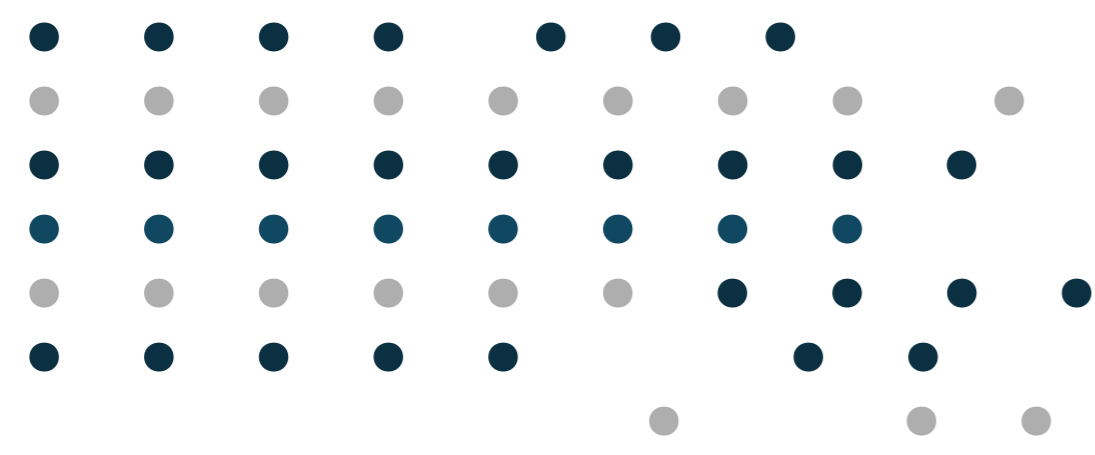




## Step 4. Following Preplanning, the Facilitator Conducts the Strategic Planning Meeting

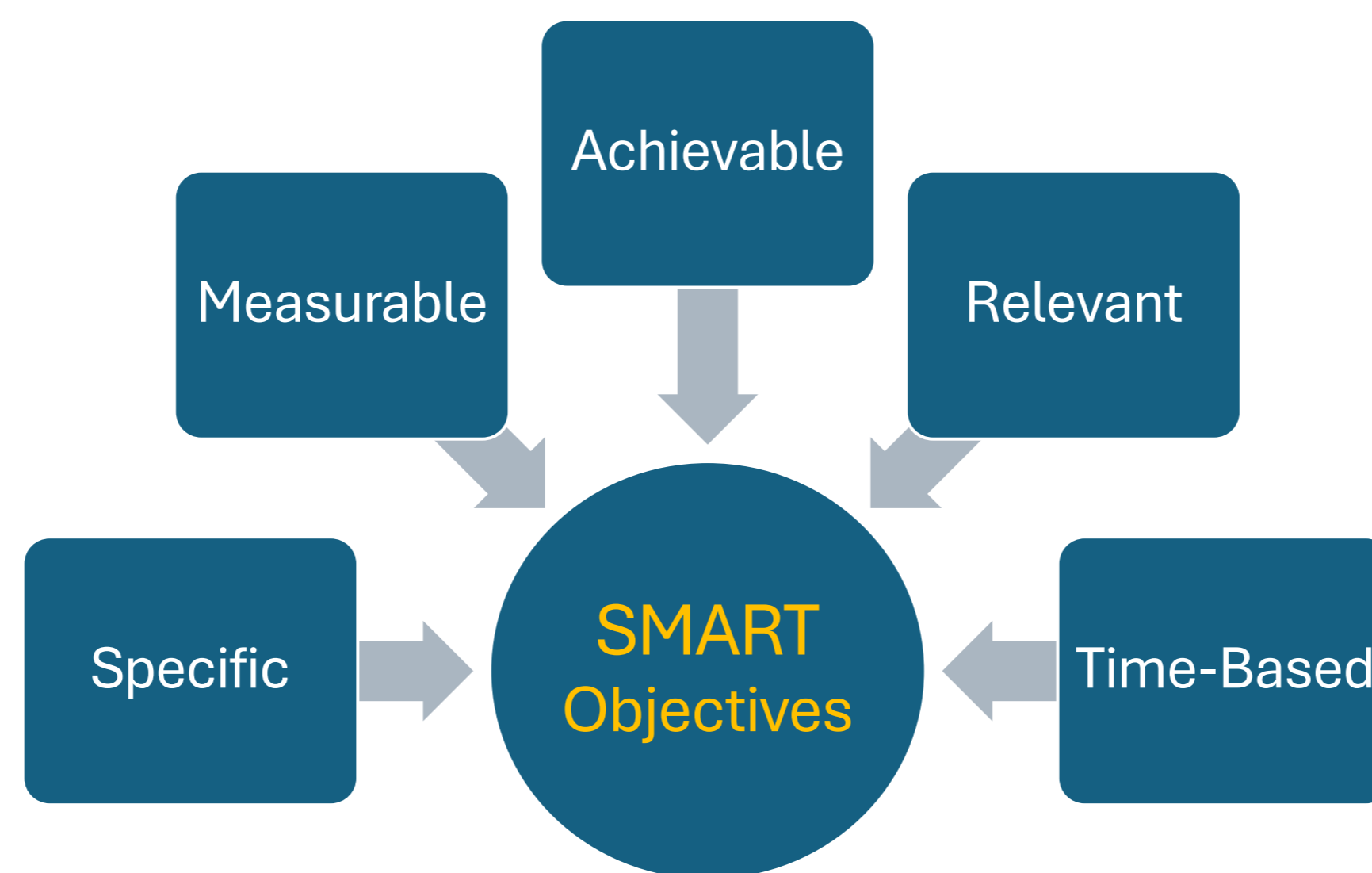
Using the situation analysis, and their own planning worksheets, team members meet in a facilitated planning meeting to create the final strategic plan.





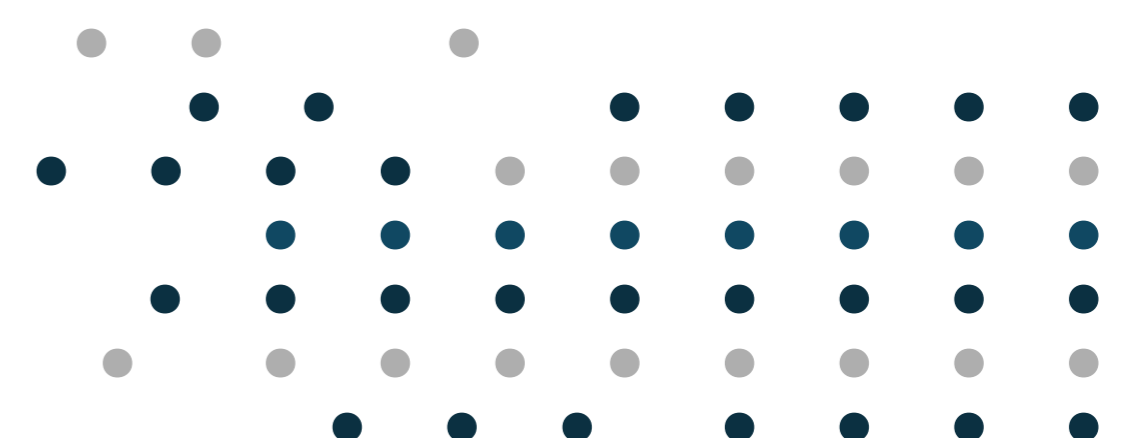
## Marketing Planning Definitions

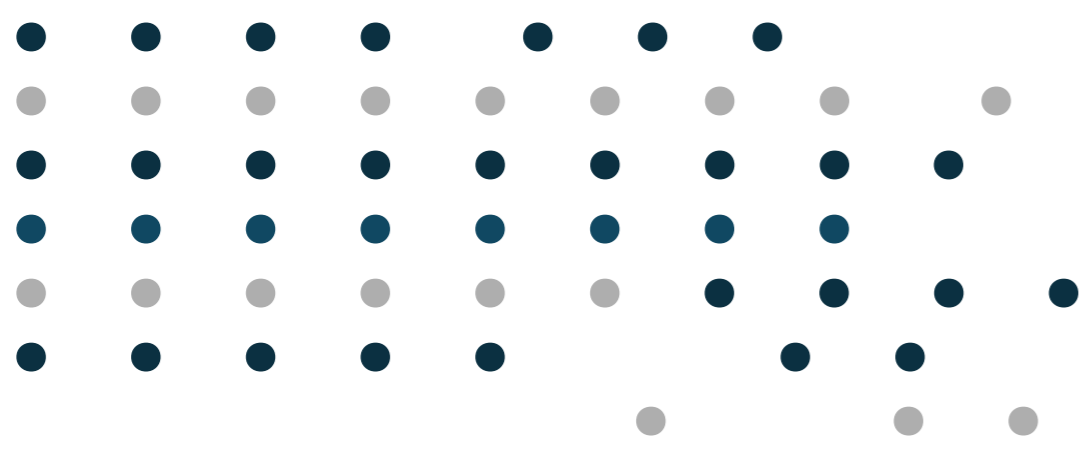
**Marketing Objectives** are specific and measurable targets that provide a clear direction for marketing activities and serve as benchmarks for evaluating success. Objectives must be **SMART** – designed to advance revenue gains from new customers and retention. Objectives must include **Key Performance Indicators (KPIs)** such as \$ or units sold, leads generated, and Return on Marketing Investment (ROMI).



**Marketing Strategies** are the overall approaches or plans designed to achieve the marketing objectives. Strategies provide a roadmap for the overall marketing efforts and guide the selection of specific tactics.

**Marketing Tactics** are the specific actions and activities undertaken to execute marketing strategies.





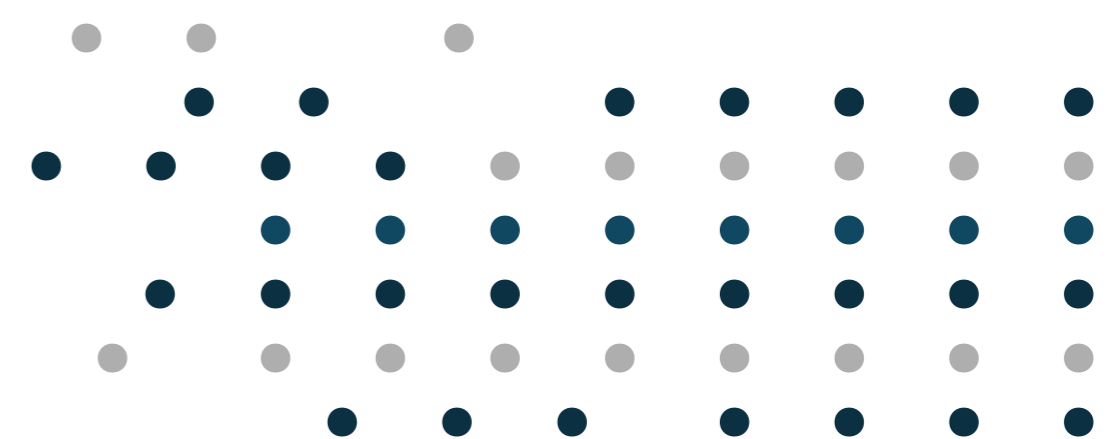
## Example of an Objective and Associated Strategies and Tactics

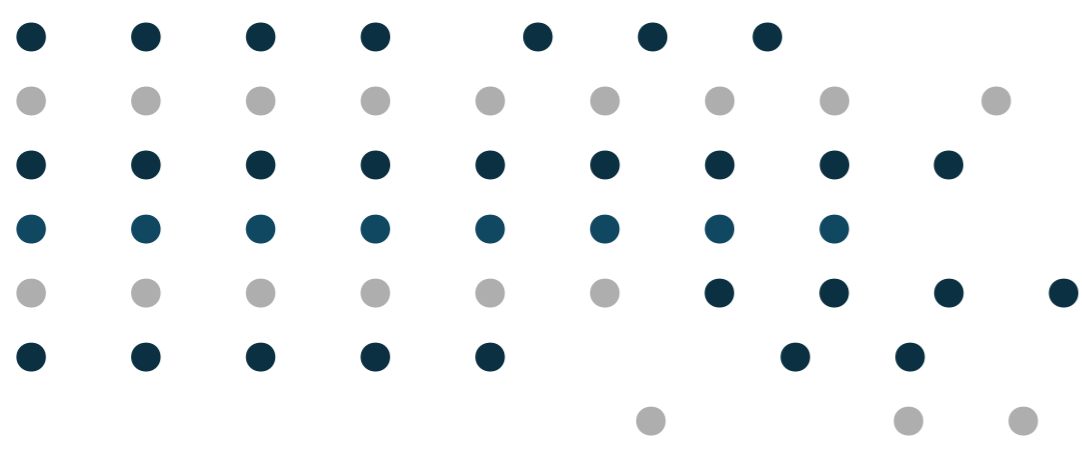
**Marketing Objective:** Launch and sell 10,000 units (KPI) of the new ABC products within 12 months.

**Strategy I:** Develop and implement tiered pricing and incentives through the distribution pipeline to secure X number of new distribution partners and drive Y% increase in stocking rates

**Tactics for Strategy I** *(Include details, responsibilities, timing, budgets)*

- 1. Branding & Messaging:** Develop a unique value proposition (UVP) and ensure all marketing materials and messaging align with the brand's identity.
- 2. Pricing:** Introduce a tiered pricing model to incentivize bulk purchasing.
- 3. Sales Incentives:** Provide distributor rebates or performance-based rewards for meeting sales targets.





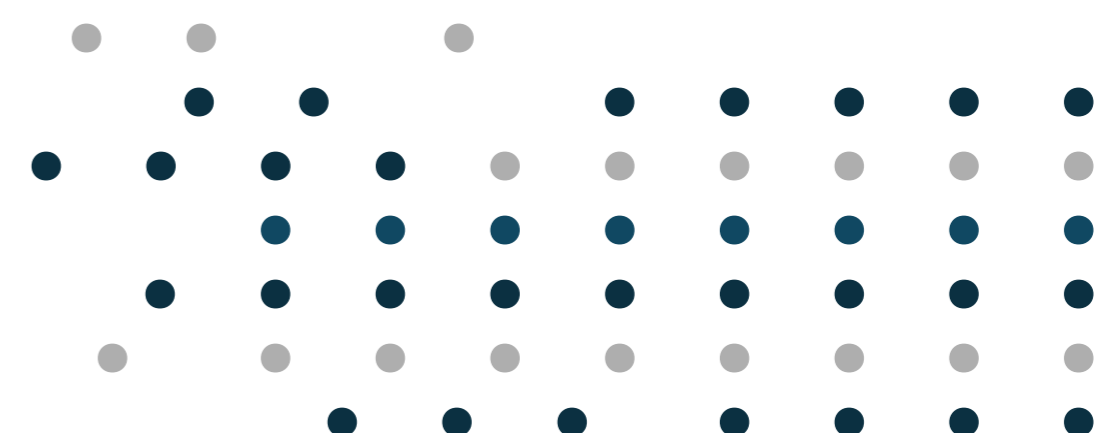
## Example (Cont.)

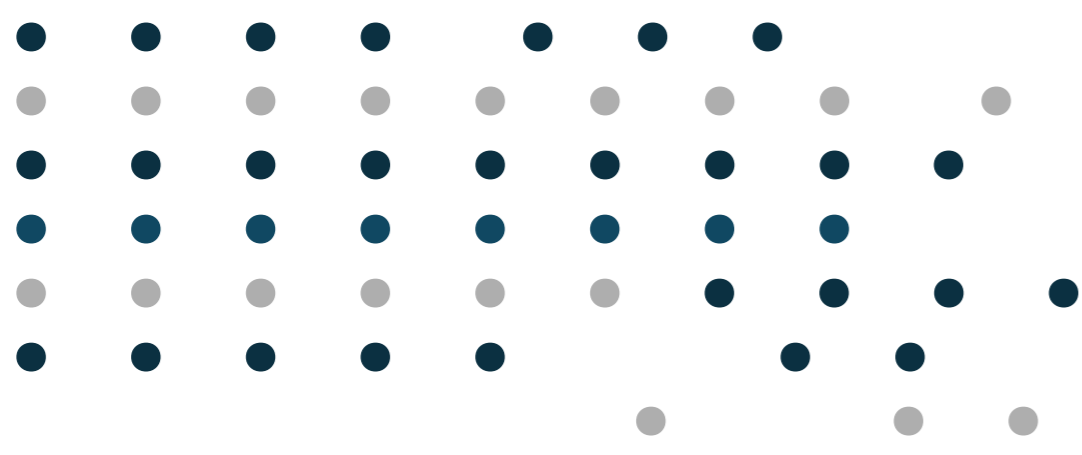
**4. Training and Education:** Host webinars or in-person workshops to ensure sales teams and distribution partners understand the product's benefits.

**5. Targeted Communications:** Develop a full range of measurable communications, including a robust website for distributors with optimized SEO, product literature, ordering options, direct mail, email, call center deployment, and trade show exhibits.

**6. Measurement:** Monitor distributor sign-ups, sales volume growth, and training completion rates.

**Strategy II:** Develop and implement a multi-channel product launch campaign to achieve X% market penetration within the first Y months

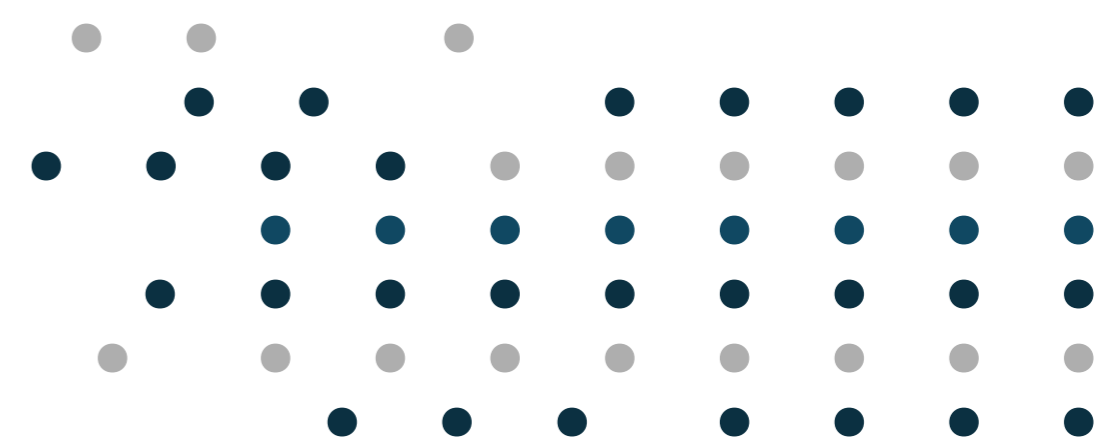


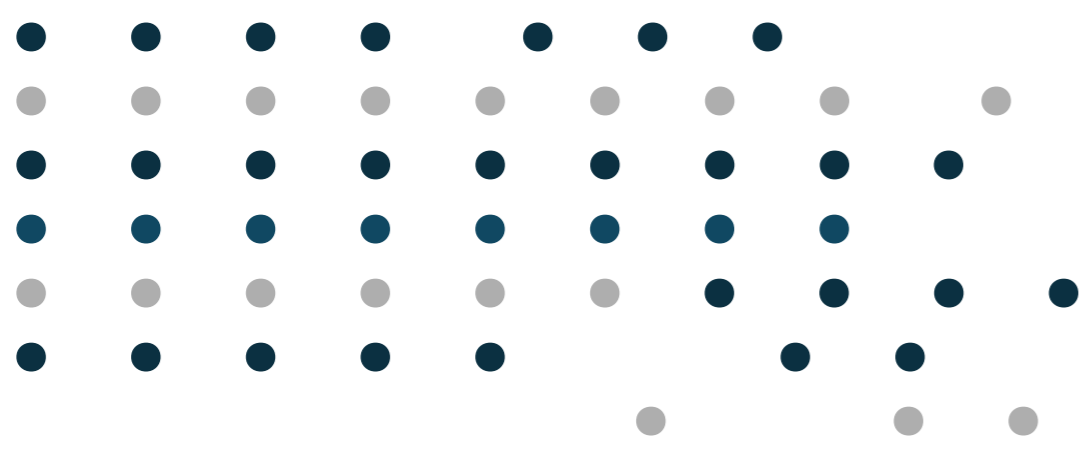


## Example (Cont.)

**Tactics for Strategy II** *(Include details, responsibilities, timing, budgets)*

- 1. Targeted Communications:** Develop a robust website, advanced SEO, segmented direct mail, email campaigns, digital ads, and social media to reach targeted audiences.
- 2. Co-op Advertising:** Develop a program to help distributors pay for advertising that follows branding and messaging guidelines to achieve a stronger local market presence.
- 3. Promotions:** Offer pull-through introductory discounts, rebates, quantity discounts, or bundles to encourage trial purchases.
- 4. Measurement:** Track engagement metrics (click-through rates, open rates), website traffic, and conversion rates to monitor campaign effectiveness.



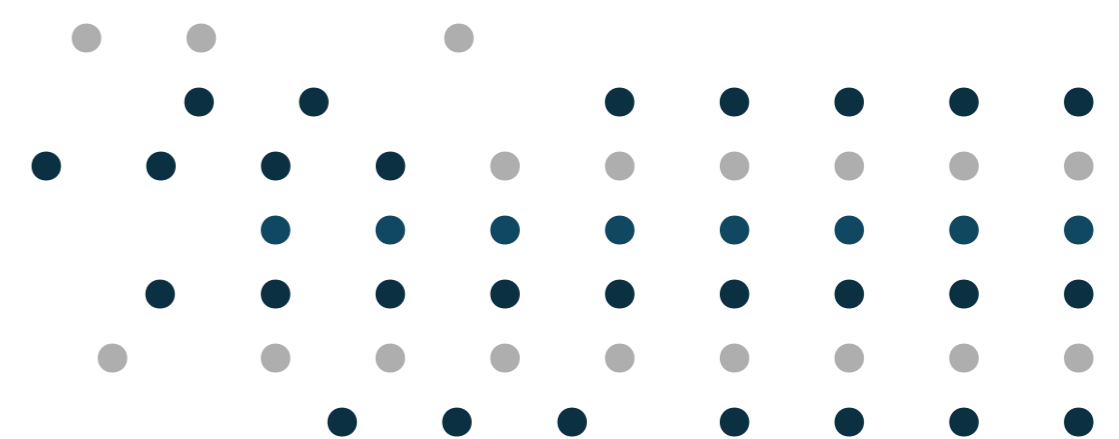


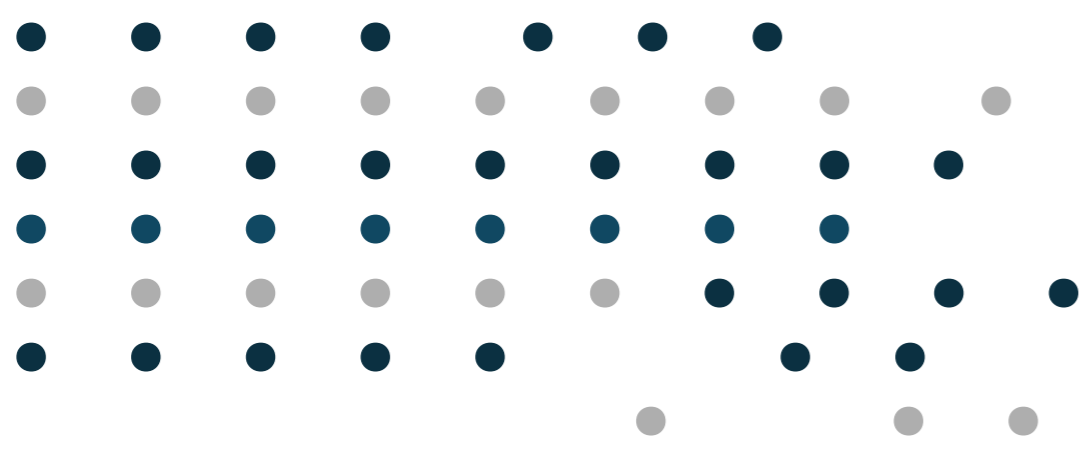
## Example (Cont.)

**Strategy III:** Optimize retail and E-commerce merchandising to achieve X% increase in product visibility and shelf placement across all distribution channels

**Tactics for Strategy III** *(Include details, responsibilities, timing, budgets)*

- 1. Merchandising:** Implement eye-catching in-store displays and optimized online product listings.
- 2. Content Marketing:** Develop compelling product descriptions, high-quality images, and demo videos.
- 3. Search and Discovery:** Use dynamic SEO tactics to improve online product discoverability.
- 4. Measurement:** Track sales by store/e-commerce channel, measure foot traffic, and analyze online search rankings.



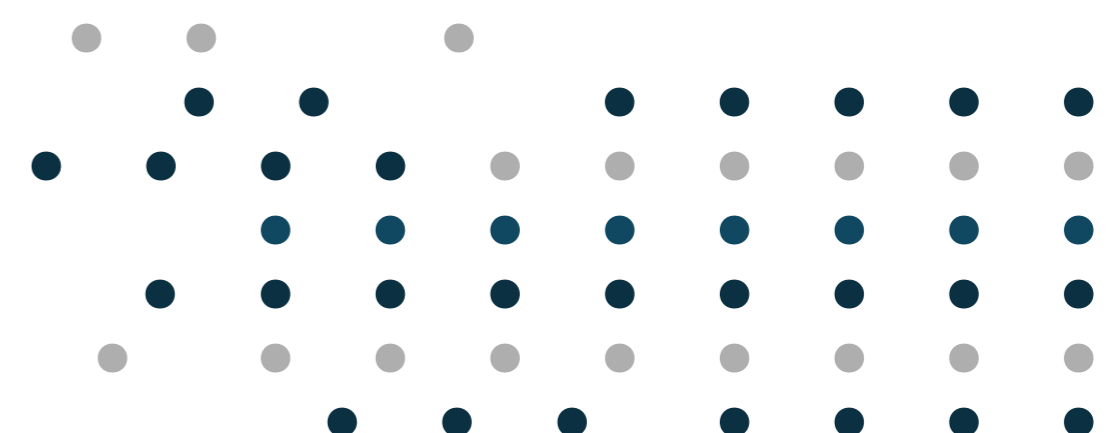


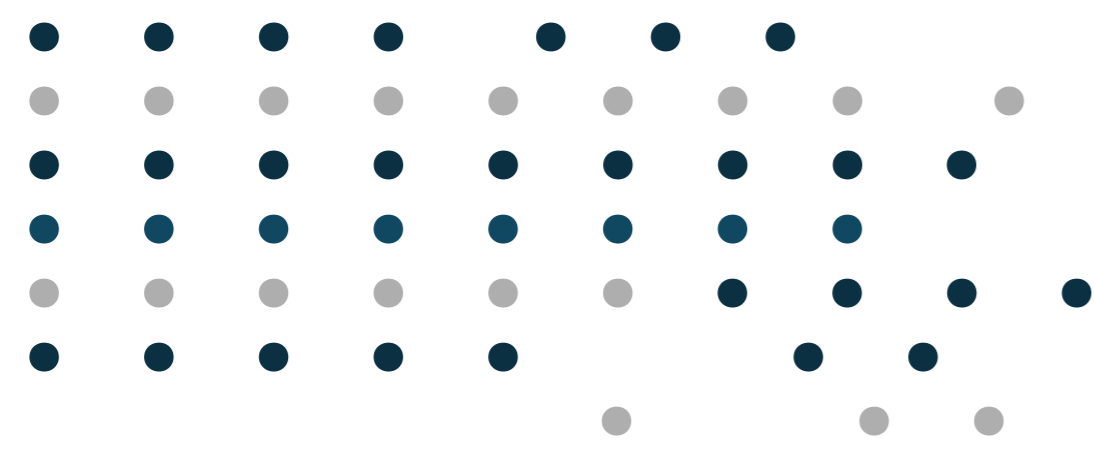
## Example (Cont.)

**Strategy IV:** Develop and implement influencer and customer advocacy to generate X number of authentic user-generated content pieces and social shares.

**Tactics for Strategy IV** *(Include details, responsibilities, timing, budgets)*

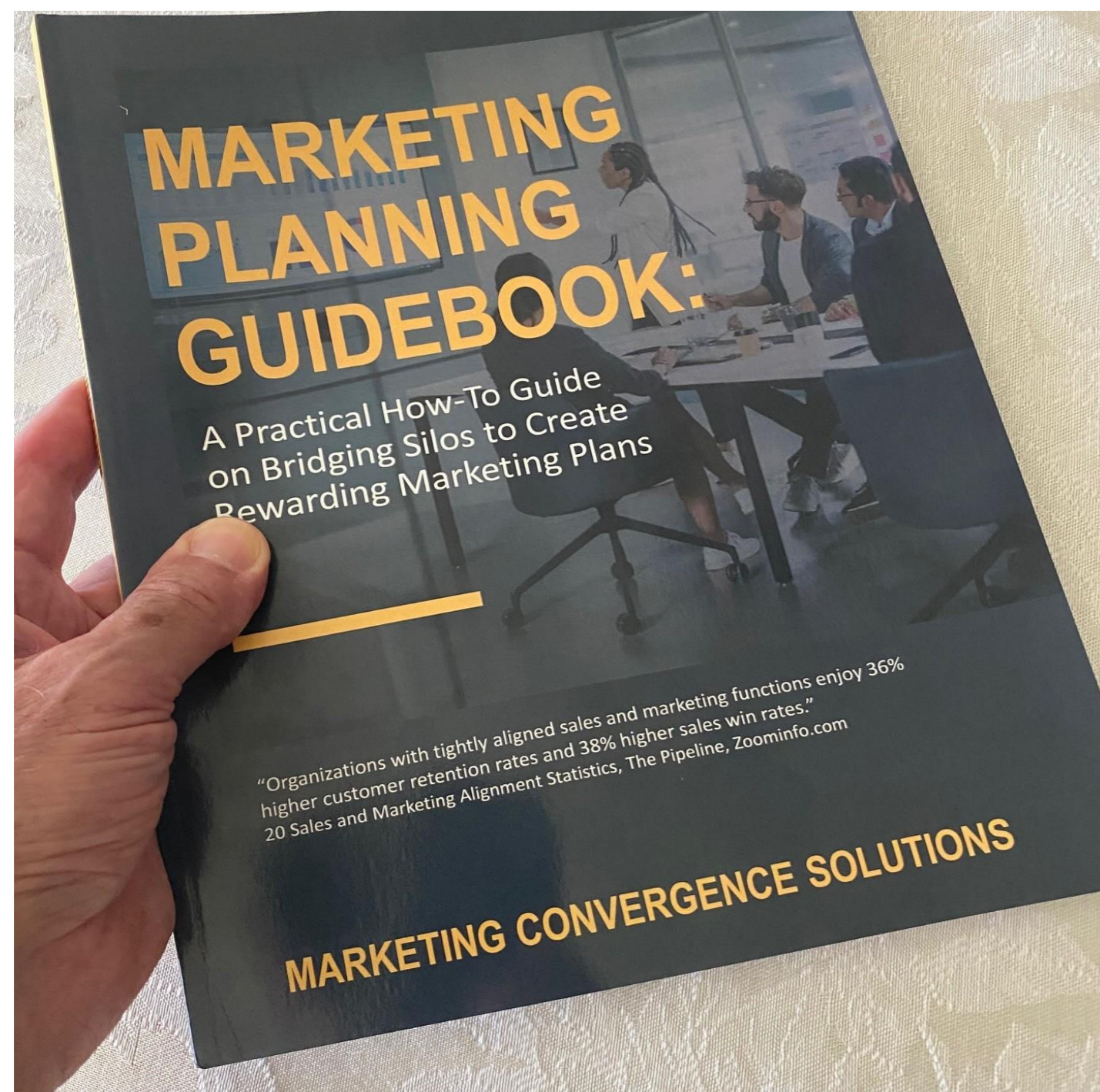
- 1. Influencer Partnerships:** Collaborate with industry-relevant influencers for product endorsements.
- 2. Customer Reviews and Testimonials:** Encourage early adopters to share their experiences via reviews and social media.
- 3. Referral and Loyalty:** Offer incentives for customers who frequently purchase and refer new buyers.
- 4. Measurement:** Track influencer engagement rates, user-generated content volume, referral conversions, and review sentiment analysis.





# Helpful Resources to Guide You Through the Marketing Convergence Planning process




A complete planning package is available at [www.ConvergenceStrategies.com](http://www.ConvergenceStrategies.com). It includes the marketing planning guidebook, online tools combining marketing theory and practice, training, interactive planning worksheets, and case studies.



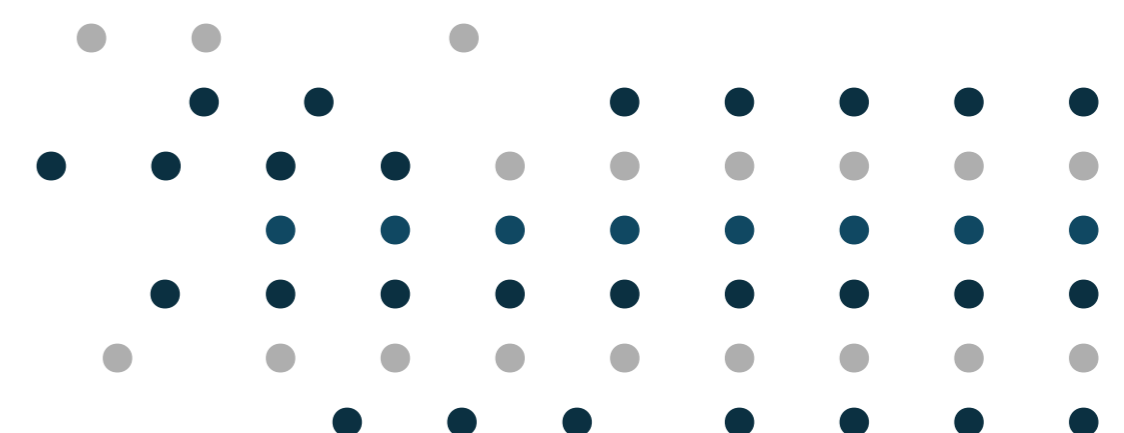
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## Step 5. Marketing Develops the Final Marketing Plan Based on Directions from the Strategic Planning Team

The marketing department or advertising/marketing agency develops the final strategic marketing plan using insights from the situation analysis and team planning meetings.

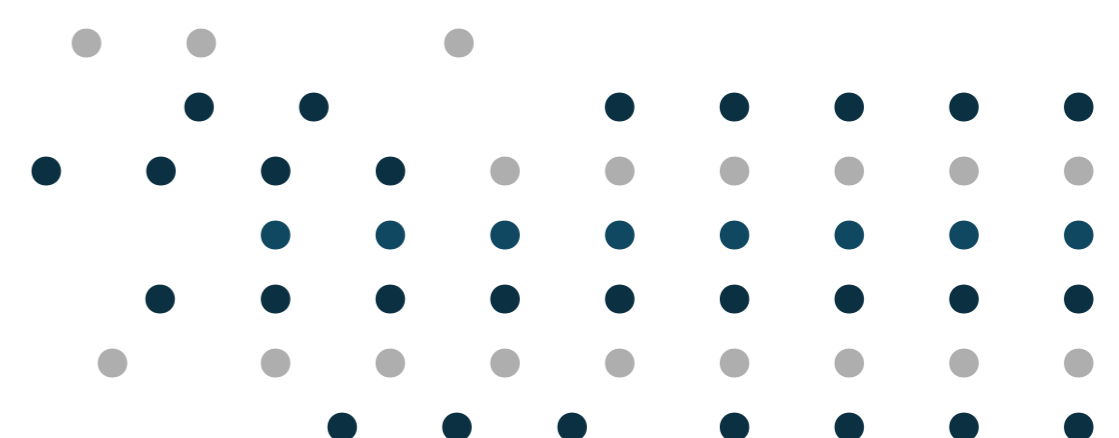
Key elements of the plan include:

- Clear objectives and strategies
- Well-defined marketing tactics with assigned responsibilities, timelines, and budgets

### Review and Approval Process

1. The planning team and facilitator conduct a thorough review, making necessary revisions.
2. The marketing team and agency refine the tactics before presenting the plan to sales and marketing managers for approval.
3. After incorporating feedback, the finalized plan is distributed to relevant teams and stakeholders.

This structured approach ensures alignment, accountability, and effective execution of marketing strategies.



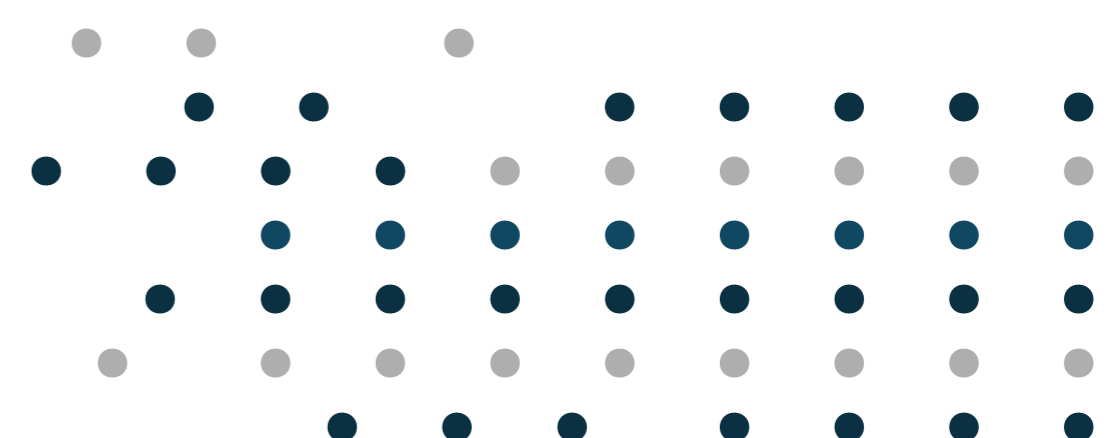


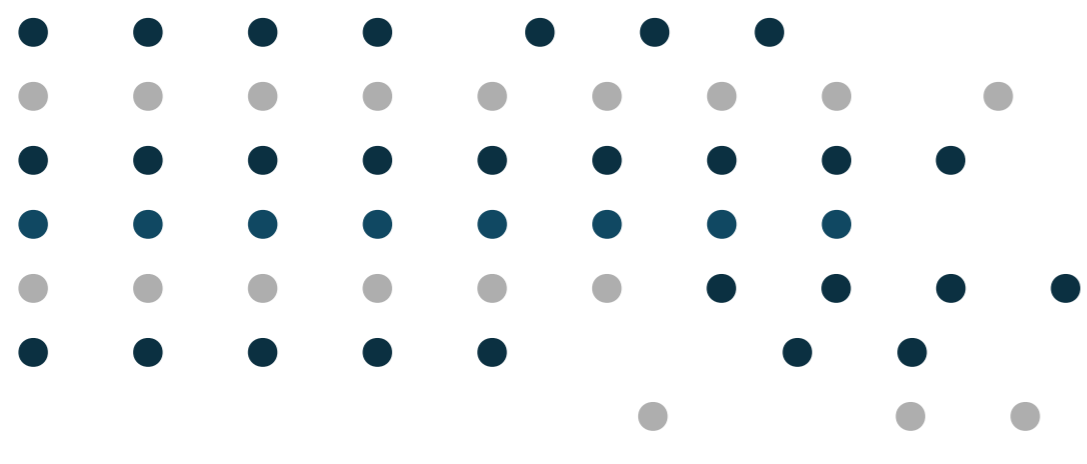
## Step 6. Present Management with an Executive Summary of the Plan for Final Approval

A concise version of the marketing convergence strategic plan, known as the executive summary, should be developed by the marketing team or an advertising/marketing agency and presented to upper management by sales and marketing leaders.

Its primary function is to efficiently communicate key insights, recommendations, and critical takeaways, enabling decision-makers to grasp essential information without reviewing the entire document.

An effective executive summary is clear, succinct, and compelling, ensuring that upper management quickly understands and acts upon the strategic direction.



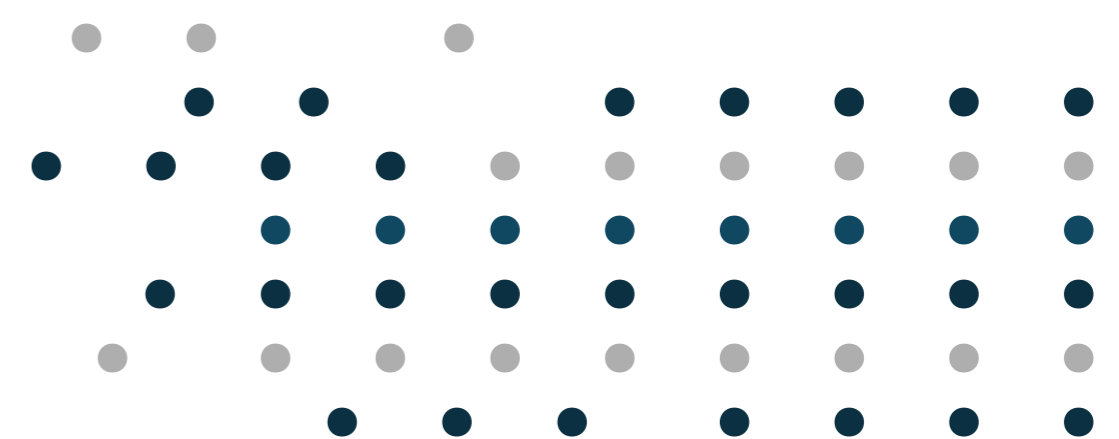


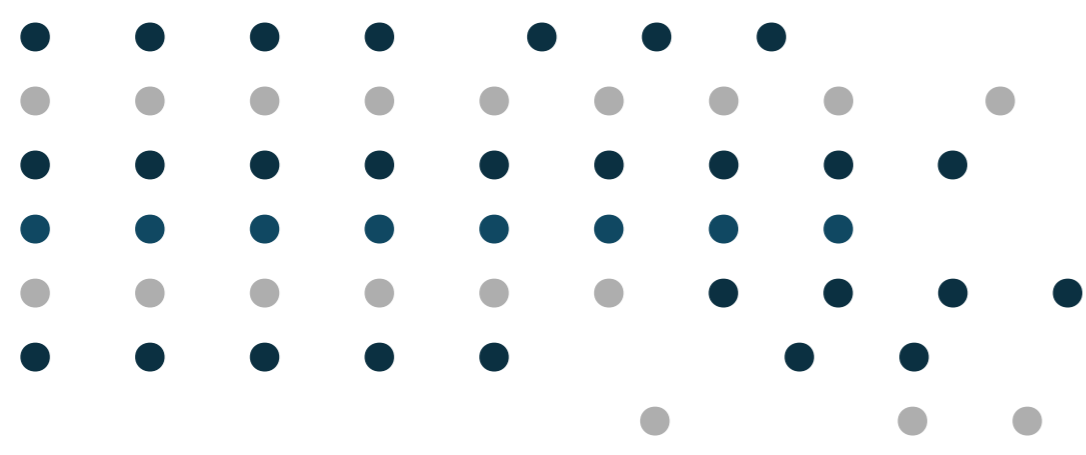
## Step 7. Marketing and Outside Resources Implement the Final Plan

With the marketing convergence plan approved, the next crucial phase is implementation. This step ensures that the strategies and tactics are executed effectively to drive business success.

- Marketing and sales work closely to ensure alignment between promotional efforts and sales objectives.
- The advertising/marketing agency or other third-party vendors provide expertise in executing campaigns, media placements, and creative assets.
- A detailed execution schedule ensures timely rollouts of campaigns and marketing activities.
- Budget management guarantees that resources are allocated efficiently, maximizing return on marketing investment (ROMI).

By following this structured approach, businesses ensure a seamless transition from planning to execution, driving growth and achieving marketing objectives.

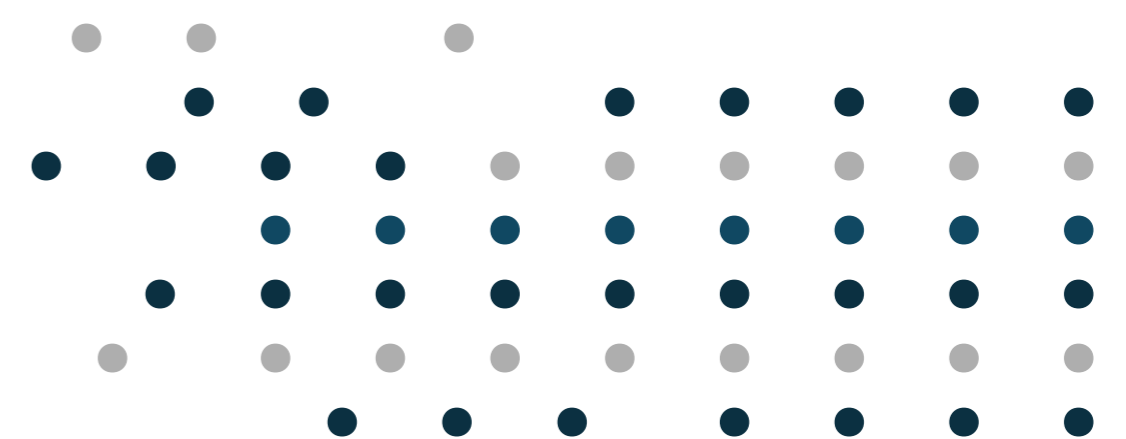




## Step 8. Continually Measure and Adjust the Marketing Plan as Needed During the Implementation

A static marketing plan can result in missed opportunities and inefficient resource allocation. To ensure agility, competitiveness, and sustained growth in an evolving marketplace, businesses must continuously monitor key performance indicators (KPIs) and implement data-driven adjustments.

It is the responsibility of marketing and sales managers to delegate team members or other relevant personnel to track performance metrics and provide regular, actionable insights for strategic decision-making.





## Conclusion

Enhancing collaboration between marketing and sales teams presents a strategic opportunity to develop targeted marketing plans that drive measurable sales growth. This approach, known as “marketing convergence,” is outlined in an innovative marketing planning guidebook from Marketing Convergence Solutions.

As part of a comprehensive planning package, the guidebook equips marketing managers with the tools to design a robust strategic marketing plan that integrates objectives, strategies, and tactics tailored to customer needs. It focuses on optimizing the customer experience while driving increased sales, lead generation, and customer retention.

This user-friendly and practical planning package includes interactive online facilitator and marketing planner training, dynamic planning worksheets, a customizable slide deck for strategic planning sessions, and real-world examples of integrated marketing objectives, strategies, and tactics.

Follow our blog posts and learn more at **Marketing Convergence Solutions**.

[www.ConvergenceStrategies.com](http://www.ConvergenceStrategies.com)

