

A woman with long braids, wearing a white blazer, stands at the head of a conference table, pointing towards a large screen displaying data charts. Several people are seated around the table, listening attentively. The room has large windows and modern office decor.

# MARKETING PLANNING GUIDEBOOK:

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

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*“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**

“**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

“...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.”

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 RE Casper

Marketing Convergence Solutions

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## BEFORE BEGINNING, AN EXPLANATION IS IN ORDER

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.

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.

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 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 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.*

# Introduction to Marketing Planning Using 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](#),”<sup>1</sup> 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 their efficiency by providing warmer and more qualified leads.

### The New Marketing Convergence Sales Funnel



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

Steve 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 and strategies 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 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 process and participate in a facilitated and collaborative 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 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.*

# Introduction to Marketing Planning Using Marketing Convergence

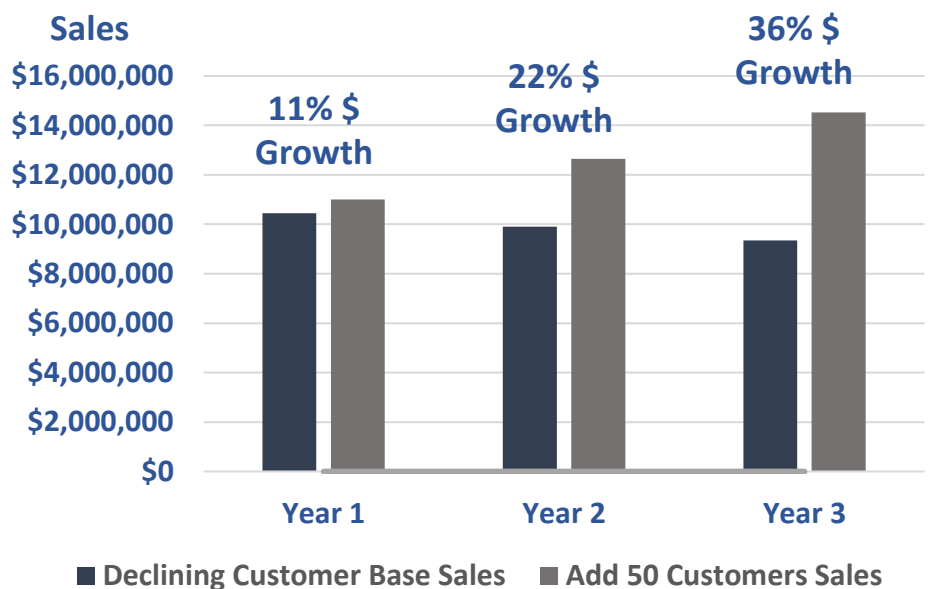
*While retaining existing customers is critical for building long-term relationships and generating repeat business, sustainable business success is dependent upon new customer acquisition.*

## 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 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 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.

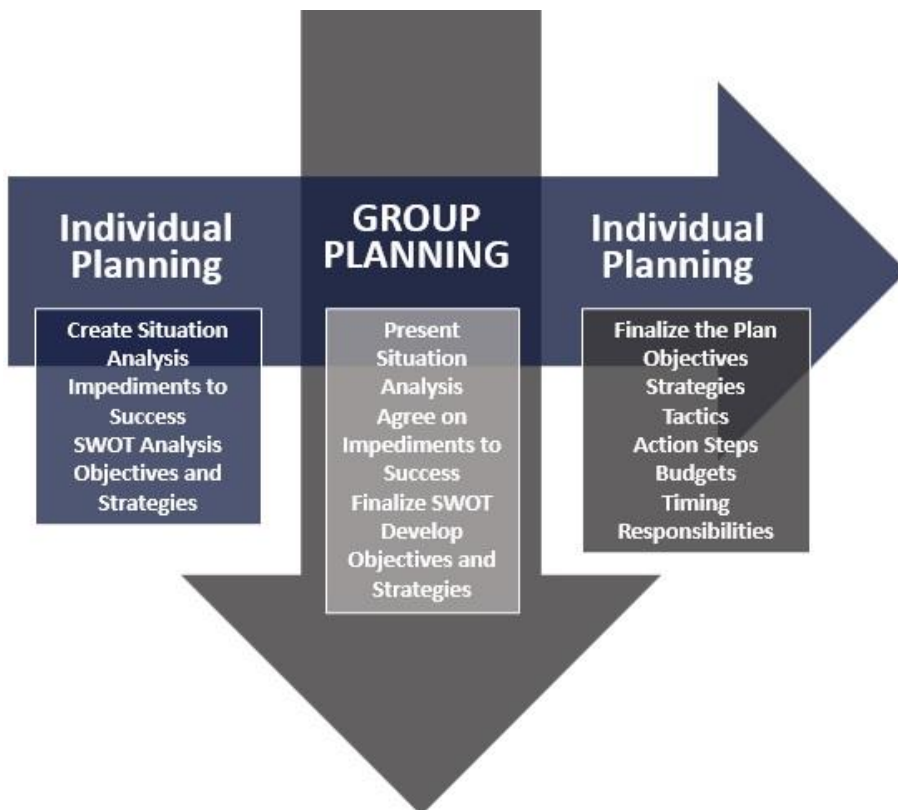
However, there are advantages to leveraging the collective intelligence rendered by multiple people being included in plan development. Group problem solving and freewheeling discussions can stimulate creative thinking and provide immediate feedback on ideas. Buy-in and personal involvement through group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

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

## Introduction to Marketing Planning Using 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.*



# 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."*

<sup>2</sup> Theodore Levitt, *"Marketing Myopia,"* Harvard Business Review Press, 1960

## WHY DO THIS PLANNING?

"[Marketing myopia](#)"<sup>2</sup> 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 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?

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

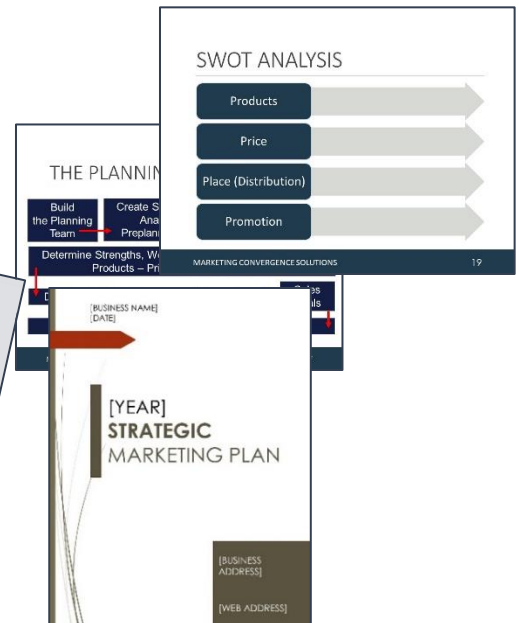
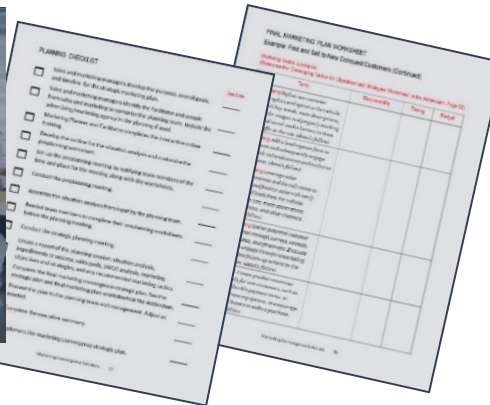
- Development of actionable marketing objectives, strategies, and tactics that will generate leads and sales
- Identifying key metrics for measuring success with your marketing
- A better understanding of the roles of sales and marketing in the strategic marketing planning process
- A clear assessment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

## Introduction to Marketing Planning Using Marketing Convergence

## WHAT'S INCLUDED WITH THIS GUIDEBOOK?

- Instructions and examples on how to converge sales and marketing resources and people to build a strategic marketing plan that can 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, marketing plan, executive summary, and the final marketing plan presentation
- 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

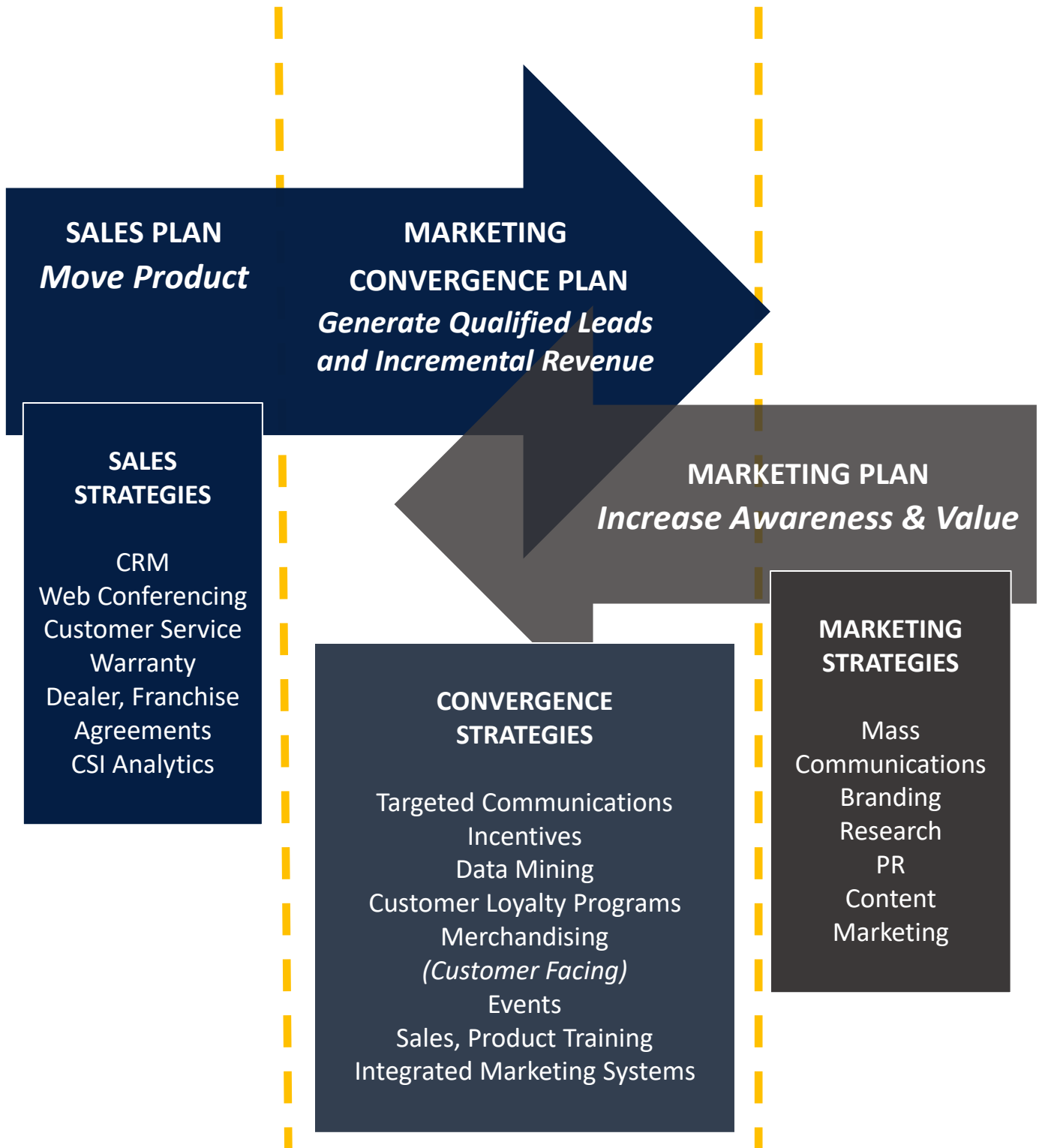
*Key Takeaways from the planning include the development of actionable marketing objectives, strategies, and tactics that will generate leads and sales, along with Identifying key metrics for measuring success with your marketing.*



# 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 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

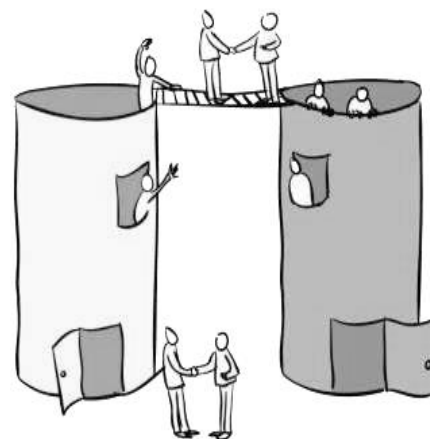
**Marketing Priority** Creating messaging for a wide or targeted audience

### 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

*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 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.

## 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.

### 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.*

### 1. PLANNING AND ORGANIZATION

First, the sales and marketing managers jointly develop a 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 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 31*

## 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.

## Caution with Other Participants

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 ideally should have a familiarity with the company, its products, and markets.

*See Addendum: Role of the Facilitator in Planning. Page 32*



## 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](http://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 26*

## 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 the 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 the 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*

This portion of the planning, completing the preplanning worksheets and the situation analysis, may take several weeks. Additional time may be required to effectively implement primary research studies or surveys in areas such as brand awareness and customer needs analysis.

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 distributed to the team members for study before the planning meeting.

## 4. FACILITATOR CONDUCTS THE 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 steps and to make sure the meeting stays on track.

The meeting should begin with the facilitator reviewing the agenda followed by a Q&A period. It is sometimes helpful to have a brief period of mental exercises so team members may more effectively engage and work together.

*See examples in the PowerPoint Presentation in the Addendum, page 43.*

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 statements.

## 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.

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 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 P’s) 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 responses.

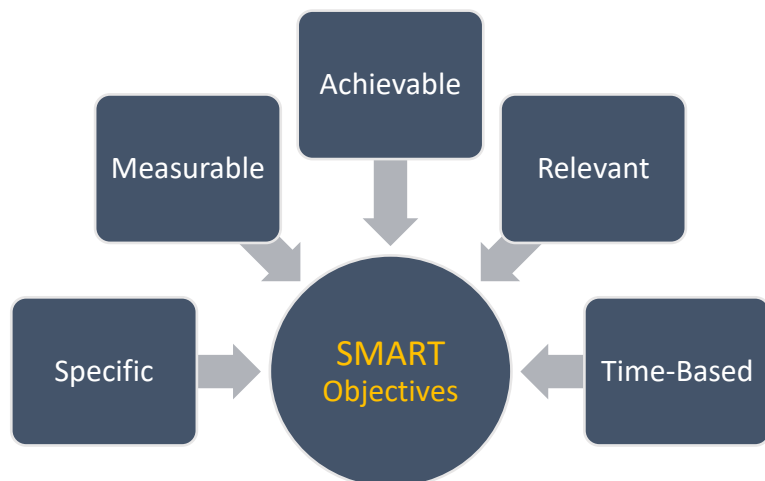
## E. Develop the Marketing Convergence Objectives and Strategies

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 **SMART**<sup>3</sup> – designed to generate revenue from customer conquest and retention.



<sup>3</sup> George T. Doran, “There’s a SMART Way to Write Management’s Goals and Objectives,” *Journal of Management Review*, 1981

Marketing objectives should also address the impediments to marketing success and overall goals of the marketing convergence plan from the situation analysis.

**Key Performance Indicators (KPI)** Attributed to Peter Drucker, the father of the KPI, is this phrase, “What gets measured gets managed.”<sup>4</sup> Therefore to manage marketing objectives, each must include a KPI (Key Performance Indicator) to measure how well the objective is being met. KPI’s also provide valuable insights into how well the marketing strategies and tactics are progressing toward helping achieve the objectives. In marketing convergence, common KPI’s can include units or \$ 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. Examples can include:

#### **Targeted Communications**

- Personalized automated Email, SMS (automated text messaging), and direct mail marketing with compelling offers
- Pay-per-click advertising with search engines, social media for lead generation and direct sales, influencers
- Call center support to qualify leads and sell products

#### **Incentives**

- Promotions, contests, sweepstakes, discounts
- Value-added marketing such as extended warranty, price match
- Seller marketing funds to support “pull-through” marketing

#### **Data Mining**

- Business and consumer data compilation services
- Customer surveys and incentives
- Website lead capture forms

<sup>4</sup> Peter Drucker, “The Practice of Management,” Harper Business, 1954

## The Marketing Convergence Strategic Planning Process

*...to manage marketing objectives, each must include a KPI (Key Performance Indicator) to measure how well the objective is being met.*

# The Marketing Convergence Strategic Planning Process

*It's important to understand the four P's, also known as the marketing mix, when developing tactics. These four elements help with the creation of create marketing tactics that can satisfy customer needs to achieve the marketing objectives and strategies.*

<sup>5</sup> E. Jerome McCarthy, "Basic Marketing: A Managerial Approach," Richard D. Irwin, Inc., 1960

## Customer Loyalty Programs

- Mobile iOS/Android apps
- Referral programs

## Merchandising

- Guidance with retail display plan-o-grams and signage to impact revenue at the point-of-sale

## Events

- Trade shows/business conferences to engage with prospects

## Training

- Incentivized product and sales training, online or classroom

## Integrated Marketing System

- Creating marketing synergy behind a common brand

## More on Marketing Tactics

At this point in the planning, only broad directions for marketing objectives and strategies are required from the planning team. As time would allow, however, the team members may discuss ideas for marketing tactics for each marketing strategy.

The final marketing tactics, with detailed descriptions, responsibilities, timing, and budgets, will be determined by specialists in the marketing department. They may be developed by a third party such as an advertising agency.

## Consider the Four P's of Marketing<sup>5</sup>

It's important to understand the four P's, also known as the marketing mix, when developing tactics. These four elements help with the creation of marketing tactics that can satisfy customer needs to achieve marketing objectives and strategies

**Product** refers to the products or services that a company offers to its customers. It involves the design, features, packaging, branding, and positioning of the product (sometimes categorized as good, better, or best).

**Price** refers to the amount of money customers are willing to pay for a product or service. Pricing involves analyzing production costs, desired profit margins, competition, market demand, and the customer's perceived value.

**Place (Distribution)** refers to the distribution channels and methods used to make the product or service available to customers. It involves making sure that the product reaches the right customers at the right time.

**Promotion** refers to the activities undertaken by a company to communicate and promote its products or services to the target market. Targeted advertising, public relations, personal selling, and other tactics can be used to support awareness building for promotions.

*See Addendum: Developing Tactics for Objectives and Strategies Worksheet, Page 61*

## 5. DEVELOP THE FINAL MARKETING CONVERGENCE STRATEGIC PLAN

The final marketing convergence strategic plan is developed by the marketing department or the advertising/marketing agency, using the directions established by the planning team.

The final actionable plan includes details to achieve each marketing objective and strategy. Marketing tactics under each strategy must be clearly defined with timing, budgets, and responsibilities..

*See Addendum: Strategic Plan and Final Marketing Plan Worksheets, Page 64*

The strategic plan worksheet contains many examples of objectives, strategies, and tactics of various business types/needs.

# The Marketing Convergence Strategic Planning Process

*The final marketing convergence strategic plan is developed by the marketing department or the advertising/marketing agency, using the directions established by the planning team.*

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# The Marketing Convergence Strategic Planning Process

*The planning team should then present the plan in a moderately formal manner to the sales and marketing managers for approval.*

*After their input, adjustments to the plan are made as needed and the final version is shared with team members and the managers.*

## Final Plan Outline

- Company and Products Description
- Purpose, Overall Goals, and Key Performance Indicators (from Objectives)
- Products We Sell
- Our Markets
- Strengths and Weaknesses (Internal)
- Opportunities and Threats (External)
- Sales Goals by Market
- Sales Goals by Product or Product Line
- Marketing Objectives, Strategies, and Tactics

**Note** Marketing objectives must include a key performance indicator (KPI) and one or more strategies. Under each marketing strategy, there are the tactics required to accomplish the strategy. Each marketing tactic includes a description of the tactic and appropriate details about timing, budgets, and who will be responsible for implementing the tactic.

- Marketing Budget Summary and Return On Marketing Investment (ROMI)

## 6. PLAN APPROVAL AND ADJUSTMENTS

The final draft of the plan should undergo a thorough review by the planning team and facilitator, followed by necessary adjustments.

Following adjustments, the planning team, supported by the advertising or marketing agency





*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.

Go to [www.convergencestrategies.com](http://www.convergencestrategies.com) to access additional marketing planning tools including:

- Interactive online training for marketing planners and facilitators
- Interactive worksheet forms for building the situation analysis, preplanning meeting, tactics, strategic plan, final marketing plan, executive summary
- Customizable PowerPoint presentation to help the facilitator guide planning meeting discussions
- Informative marketing planning blog posts from Marketing Convergence Solutions


## LEARN MORE ABOUT STRATEGIC MARKETING PLANNING

More information and resources to help you learn more about strategic planning using marketing convergence solutions can be found at our website, [www.convergencestrategies.com](http://www.convergencestrategies.com).

Available for download are a PDF of the guidebook, interactive planning worksheets, PowerPoint for presenters, and other planning tools. Also, an available five lesson online interactive training course can be accessed from the website.

MARKETING CONVERGENCE SOLUTIONS BLOG MENU


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## FOLLOW CASPER'S BLOG

Casper's blog offers useful tips and ideas about marketing planning and marketing in general. Checkout our latest blog posts at [www.convergencestrategies.com](http://www.convergencestrategies.com).


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?

Harnessing the power of both individual and group thinking from marketing and sales 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 that fully shows how companies can develop a well-crafted strategic marketing plan encompassing objectives, strategies, and tactics that better meet customer requirements, improve customer engagement, and measurably increase sales, leads, and customer retention.

Easy to understand and implement, the comprehensive planning package also includes online interactive facilitator training, interactive planning template forms, a PowerPoint presentation for planning sessions, and examples of measurable 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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