COURSE SYLLABUS FOR STRATEGIC MARKETING PLANNING

This course will prepare students to think critically about the alignment of marketing and sales in the marketing planning process and give them the tools necessary to organize and create an effective strategic marketing plan.

MARKETING CONVERGENCE SOLUTIONS

Course Syllabus for Strategic Marketing Planning

by RE Casper

Marketing Convergence Solutions

www.convergencestrategies.com
info@convergencestrategies.com

Vero Beach, Florida 32967

Contents

Syllabus Overview

Course Title: Strategic Marketing Planning: Theory and Practical Applications

Course Code: MKT 400 level for undergraduate or graduate school

Course Description:

This course is designed to equip students with practical knowledge and tools to develop a strategic marketing plan using Marketing Convergence theory and techniques found in the textbook:

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

By aligning sales and marketing functions in an organization, students will learn how to create a customer-centric marketing plan for a business that improves engagement, increases qualified leads, and grows sales. Through a combination of individual and group-based thinking and role playing, students will also learn how to overcome common barriers between sales and marketing teams and successfully implement data-driven marketing objectives, strategies, and tactics.

Course Objectives:

By the end of this course, students will:

- Gain practical knowledge and skills in strategic marketing planning, including how to structure, implement, and create plans with measurable results.
- Understand the principles of Marketing Convergence and its role in bridging marketing and sales functions with the organization.

Syllabus Overview *(Continued)*

Course Title: Strategic Marketing Planning: Theory and Practical Applications

Course Code: MKT 400 level for undergraduate or graduate school

Course Outline: 4 Lessons, 16 weeks, 32 Hours of Classroom Time

- Learn to overcome organizational sales and marketing silos to develop actionable marketing objectives, strategies, and tactics.
- Understand the importance of balancing new customer acquisition with customer retention.
- Learn to collaborate in group and individual settings to generate innovative marketing solutions.
- Understand the role and importance of the facilitator in the marketing planning process.
- Develop the ability to assess customer needs and competitive landscapes for more effective decision-making.

Required Text:

***Marketing Planning Guidebook: A Practical How-To Guide on Bridging Silos to Create Rewarding Marketing Plans* by RE Casper.**

Course Format and Expectations:

This course will consist of lectures, discussions, quizzes, case studies, and team projects. Students are expected to engage actively, contribute to group discussions, and apply concepts from the textbook to a real-world marketing case study. Class participation and collaboration in group activities will be a vital component of success in this course.

Lesson 1

Lesson 1: The Basics of Strategic Marketing Planning Using Marketing Convergence Techniques

Six classroom sessions

Teaching students the basics of strategic marketing planning using marketing convergence techniques. The lesson readings from the guidebook encompass these areas of marketing convergence strategic planning:

- What is Marketing Convergence Strategic Planning
- Bridging internal sales and marketing silos
- Importance of customer conquest and retention
- Group thinking vs. individual creative thought in the planning process
- Barriers to sales and marketing alignment
- Defining the roles of sales and marketing in the planning process
- Key takeaways from marketing convergence strategic planning
- Communications failures
- The eight-step marketing convergence strategic planning process

Lesson Retention:

Quizzes: Test knowledge of the required readings

Lesson 1 *(Continued)*

Lesson 1: The Basics of Strategic Marketing Planning Using Marketing Convergence Techniques

Individual Papers:

- Describe how marketing and sales currently operate in silos in a business you are familiar with?
- Describe three instances where companies failed to communicate internally and/or externally, and the result was a product or service failure. (see examples on page 12)

Required Readings:

- Textbook: Pages 3-13
- *5 Strategies for Successful Marketing and Sales Alignment* - American Marketing Association
- *"20 Sales and Marketing Alignment Statistics,"* The Pipeline, Zoominfo.com
- Hubspot.com, "*The Power of Smarketing*," Web Guide
- Steve Patrizi's, "The *New Marketing & Sales Funnel*," Steve Patrizi's Blog, 2012
- *"How Can Traditional and Digital Marketing Work Together,"* American Marketing Association
- Theodore Levitt, "*Marketing Myopia,*" Harvard Business Review Press, 1960

Lesson 2

Lesson 2: Team Preparations Required for Marketing Convergence Strategic Planning

Ten classroom sessions

Lesson 2 teaches students how to prepare themselves for the marketing convergence strategic planning meetings.

- Role of the facilitator in planning
- Selecting planning team members
- Organizing the preplanning session for team members
- Reviewing and instructing students on how to prepare preplanning worksheets
- Reviewing the situation analysis worksheet and assigning students sections to complete

Quizzes: Test knowledge of the required readings

Individual Paper: Case Study. Review the case study. Using available interactive forms, individual students complete their preplanning worksheet.

Each student completes a section of the situation analysis, and a final document is compiled by student volunteers.

Class Presentations and Critique

Required Reading: Textbook Pages 13-16, 26-27, 33-42

Lesson 3

Lesson 3:
Facilitating the Strategic Planning Meeting

Eight classroom sessions

Lesson 3 teaches students areas to discuss, and the techniques needed to conduct an effective marketing convergence strategic planning meeting.

Areas covered include:

- Using planning meeting tools including the PowerPoint guide, flip charts, planning meeting notes
- Need for confidentiality
- Creating sub-teams
- Presenting the situation analysis
- Reviewing impediments to success from the planning team
- Determining sales goals
- Conducting a SWOT analysis
- Formulating objectives, strategies, and tactics

Quizzes: Test knowledge of the required readings

Role Playing: Students role play a planning meeting facilitator conducting a strategic planning meeting based on their completed preplanning and situation analysis worksheets in Lesson 2.

- The classroom is divided into teams for planning and discussions.
- Class members take turns facilitating a section of the planning process.

Lesson 3 *(Continued)*

Lesson 3:
Facilitating the Strategic Planning Meeting

- Volunteers are asked to complete the planning meeting notes worksheet during discussions. The final planning meeting notes worksheet is distributed to students after the planning is completed.

Required Reading: Textbook Pages 16-22, 43-69

Suggested Reading:

- George T. Doran, *"There's a SMART Way to Write Management's Goals and Objectives,"* Journal of Management Review, 1981
- Peter Drucker, *"The Practice of Management,"* Harper Business, 1954
- *"Income Bifurcation Affects Consumer Buying Behavior,"* Deloitte.wsj.com, June 2019
- [9]John Coleman, *"It's Time to Take a Fresh Look at Your Company's Values,"* Harvard Business Review, March 2022

Lesson 4

Lesson 4: Writing the Final Strategic Marketing Plan and Executive Summary

Eight classroom sessions

Lesson 4 teaches students the steps involved, following the completion of the strategic planning sessions, in writing the final marketing convergence strategic plan.

Areas covered in this lesson include:

- Introduction to the interactive strategic plan worksheet
- Reviewing examples of marketing convergence objectives, strategies, and tactics
- Introduction of the executive summary interactive worksheet

Quizzes: Test knowledge of the required readings

Paper: Student teams write a strategic marketing plan based on the case study, preplanning worksheets, situation analysis, and planning meeting notes from the planning meeting in Lesson 3.

Student teams present their marketing plan to the class and the class critiques.

Student teams are required to turn in the marketing plan.

Student teams may write an executive summary for extra credit.

Required Reading: Pages 21-23, 70-92

Additional Instructions

This course will prepare students to think critically about the alignment of marketing and sales in the marketing planning process and give them the tools necessary to organize and create effective, data-driven marketing objectives, strategies, and tactics.

Assessments:

- Participation and Class Discussion: 10%
- Quizzes: 15%
- Individual Papers: 15%
- Role Playing: 10%
- Strategic Marketing Plan and Executive Summary: 50%

Policies: Conform to all university policies

EMPOWER YOUR STUDENTS WITH THE HANDS-ON KNOWLEDGE AND SKILLS THEY NEED TO CREATE A REWARDING STRATEGIC MARKETING PLAN

This new marketing planning course syllabus offers a new approach for students: Integrating a hands-on marketing project to develop the essential skills and confidence innovative marketers need to advance their business careers.

With the *Marketing Planning Guidebook: A Practical How-To Guide on Bridging Silos to Create Rewarding Marketing Plans,* students can be taught a comprehensive process on how to create a customer-centric marketing plan that improves engagement, fosters retention, increases qualified leads, and grows sales.

Marketing Convergence Solutions | www.convergencestrategies.com
Info@convergencestrategies.com | Vero Beach, Florida 32967