

# Step Five

Module Four

Mini Lesson Guide

the  
marketing  
Democracy™

# Welcome!



You will never reach your destination without a roadmap. Marketing is a journey that requires a well-designed strategy and plan. Don't confuse "real-time" marketing with marketing "from the hip." You need an annual marketing plan and this module is designed to give you the tools to create that plan. There's no single way to design a marketing plan. We're going to provide you with three different choices so that you can select the approach that's right for you. By taking this step, you might discover that you still have more work to do. And, that's okay! We're here to help and we encourage you to revisit the lessons across the Five Step System to help you as you complete this last important step.

- Judy

## Module Overview

In this module, we are going to focus on four key ideas:

- In [Lesson One](#), you will learn three different approaches to developing your annual marketing plan so that you can choose the approach that's right for you.
- In [Lesson Two](#), you will learn that marketing plans don't come together by chance. They are the summary of all the great work you have done across the Five Step System.
- In [Lesson Three](#), you will learn how to test your strategy at various levels of spending to ensure that your strategy can hold up to financial pressure.
- In [Lesson Four](#), you will learn to make hard choices. You will likely run out of resources before you run out of ideas.

To help you build and organize your annual marketing plan, you can purchase an "Annual Marketing and Media Plan Template." This downloadable PDF is fully functional if you open it in Adobe Acrobat Reader. Be sure to click on the "listen" icon in the lower right-hand corner to learn more about this helpful tool. And, for additional inspiration, you can watch the real-world example video to see this lesson in practice.

Congratulations on taking this important step in your journey to developing world-class marketing for your business.








# Lesson One

## Three Different Approaches: What's Right for You?

### Why This Matters

Ask yourself, what does your annual marketing plan look like? How do you express your activities across time and channel? While annual marketing plans are constantly evolving, they still need to be expressed on paper (literally or digitally) so that there is a clear line of sight for all parties involved. How you go about expressing your marketing plan is up to you. There is no one set format. This lesson will share three different approaches to constructing your annual marketing plan so that you can select the approach that feels right for you.

### 5 Key Takeaways

-  You can't build your business without a game plan. There is no such thing as marketing "from the hip."
-  There are three different ways to organize a marketing plan across time and channel. Pick the one that's best for you.
-  If you know your customers really well, and they fall into distinct segments with specific wants and needs, use a customer-centered approach to organizing your marketing plan.
-  If your business is promotionally driven and you have a solid calendar of various promotional events, use a promotion-based approach to building your marketing plan.
-  If you have a well developed brand story that can travel across time and channel, a story-based approach to building your marketing plan may be right for you.



## Ask Yourself

**Before moving on to Lesson Two, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of the lesson?

If you were to place your current marketing plans on a continuum from a well-organized annual plan on one end, and completely spontaneous on the other, which end of the spectrum would you fall?

Which of the three approaches feels right to you? Do you have a head-start in one of the three areas? Which one will be easiest to adopt?

Regardless of which of the three approaches you take when organizing your marketing, your overall approach must remain customer-centered. Do you have all the building blocks in place to deliver a customer-centered strategy? If something's missing, go back to the Five Steps.








# Lesson Two

## Have You Done Your Homework?

### Why This Matters

For those of you who have been following along throughout the five step system, this statement will be quite obvious to you: do your homework! It's nearly impossible to develop an annual marketing plan without doing the upfront work that will prepare you for the task. This lesson outlines what we mean by "homework." Most large companies refer to this as an "annual business review." We'll make what sounds daunting quite simple so that you can conduct your own business review as efficiently as possible. Think of this step as time well spent. It will set you up for success.

### Key Takeaways

-  Do your homework. Don't attempt to write your annual marketing plan without a firm understanding of the job(s) to be done.
-  Take an audit of the Five Step System to double-check that you have the tools that you need to successfully build your plan.
-  Reflect upon your most recent year-end. What went well? What needs to be improved?
-  Be sure to account for new marketplace dynamics that can impact your business either positively or negatively.
-  As part of your homework, be sure to ask for feedback from key stakeholders: your customers and/or your employees. They can tell you what's working and what opportunities lie ahead.

# CALENDAR 2021

| FEBRUARY |    |    |    |    |    |  | MARCH |    |    |    |    |    |    |  |
|----------|----|----|----|----|----|--|-------|----|----|----|----|----|----|--|
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| 8        | 9  | 10 | 11 | 12 | 13 |  | 7     | 8  | 9  | 10 | 11 | 12 | 13 |  |
| 15       | 16 | 17 | 18 | 19 | 20 |  | 14    | 15 | 16 | 17 | 18 | 19 | 20 |  |
| 22       | 23 | 24 | 25 | 26 | 27 |  | 21    | 22 | 23 | 24 | 25 | 26 | 27 |  |
|          |    |    |    |    |    |  | 28    | 29 | 30 | 31 |    |    |    |  |

| APRIL |    |    |    |    |    |  | MAY |    |    |    |    |    |    |  |
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| 10    | 11 | 12 | 13 | 14 | 15 |  | 13  | 14 | 15 | 16 | 17 | 18 | 19 |  |
| 17    | 18 | 19 | 20 | 21 | 22 |  | 20  | 21 | 22 | 23 | 24 | 25 | 26 |  |
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| JUNE |    |    |    |    |    |  | JULY |    |    |    |    |    |    |  |
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| AUGUST |    |    |    |    |    |  | SEPTEMBER |    |    |    |    |    |    |  |
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| 9      | 10 | 11 | 12 | 13 | 14 |  | 5         | 6  | 7  | 8  | 9  | 10 | 11 |  |
| 16     | 17 | 18 | 19 | 20 | 21 |  | 12        | 13 | 14 | 15 | 16 | 17 | 18 |  |
| 23     | 24 | 25 | 26 | 27 | 28 |  | 19        | 20 | 21 | 22 | 23 | 24 | 25 |  |
| 30     | 31 |    |    |    |    |  | 26        | 27 | 28 | 29 | 30 |    |    |  |

| OCTOBER |    |    |    |    |    |  | NOVEMBER |    |    |    |    |    |    |  |
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| 17      | 18 | 19 | 20 | 21 | 22 |  | 17       | 18 | 19 | 20 | 21 | 22 | 23 |  |
| 24      | 25 | 26 | 27 | 28 | 29 |  | 24       | 25 | 26 | 27 | 28 | 29 | 30 |  |

| DECEMBER |    |    |    |    |    |  |
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| 17       | 18 | 19 | 20 | 21 | 22 |  |
| 24       | 25 | 26 | 27 | 28 | 29 |  |
| 31       |    |    |    |    |    |  |

## Ask Yourself

Before moving on to Lesson Three, take the time to reflect on this lesson.

Do you understand the five key takeaways that were presented at the beginning of the lesson?

What are the top 3 jobs to be done in the coming year? It's important to clearly state your top objectives and leave everything else to the side.

Do you currently conduct an annual business review? If you don't, now is a good time to start! What can you learn from last year?

What is going on in your category (either positively or negatively) that you need to plan for?

# Lesson Three

Can Your Strategy Hold Up to High/Medium/Low Spending?

## Why This Matters

It's extremely rare that your marketing budget will remain unchanged throughout the year. What happens if you need to cut spending? Will your entire marketing strategy fall apart? We have seen this happen too often. This lesson is designed to help you test your marketing strategy at different levels of spending to ensure that you can stay the course despite the inevitable change in your budget. By knowing in advance what will stay and what will go, you can build a more resilient marketing strategy that can withstand the shifts in spending.

## Key Takeaways

- Marketing budgets will surely change throughout the year. Your marketing plan should withstand the budget torture test.
- Set high, medium, and worst-case marketing budgets for the year and build your annual marketing plan to the middle.
- Test your marketing plan at the high budget and the worst-case budget to make sure that your marketing strategy still holds up across a range of spending.
- Set quarterly review windows to manage your budget throughout the year. Avoid having to cut the entire marketing budget toward the end of the year in order to make your bottom-line.
- If your marketing budget shifts, your expectations should shift as well. You can't do more with less, and you should do more with more.





## Ask Yourself

**Before moving on to Lesson Four, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of this lesson?

What steps do you take to make sure that your marketing strategy can withstand changes (up or down) in your marketing budget?

Do you currently have a formal review process (ideally every quarter) to review your marketing plans? If you don't, what steps can you take to put these reviews in place?

Have you ever been in a situation where you had to cut your entire marketing budget in order to make your numbers? What happened as a result? Did you wind up digging a hole for yourself in the following year? What are the lessons learned from the experience?

# Lesson Four

Make Hard Choices: Focus, Focus, Focus!

## Why This Matters

You may have heard the expression, “Don’t bite off more than you can chew.” This couldn’t ring more true when it comes to developing your marketing game plan. We’ve provided you with inspiration across five different steps, 20 different modules and 80 individual lessons! Pick your battles. Focus on a few important strategies and do them well. A marketing game plan that attempts to do too much will not succeed at anything. This last lesson in the five step system will help you focus on what really matters. You can always add great strategies and tactics to your game plan as you go. For now, stay focused.

## Key Takeaways

- Chances are, you will run out of resources before you run out of ideas. Your job is to focus, focus, focus!
- The downfall of any marketing plan is trying to do too much. Stay focused on just a few key strategies and execute them well.
- Know the difference between a strategy (an overall game plan or approach) and tactics (individual activities that fit the strategy). Don't put tactics before strategy.
- If you are unsure whether you are focused enough, create themes and organize all your activities by these themes. If something doesn't fit, it doesn't belong.
- The best marketing plan "cuts into bone." Meaning, it leaves a great strategy (or two) off the plan.





## Ask Yourself

**Before moving on to the action plan, take the time to reflect on this lesson.**

Do you understand the five key takeaways that were presented at the beginning of the lesson?

Is your marketing plan strategic? Or does it consist of random tactics? If you were to organize your marketing into themes, what would those themes be?

Are you trying to do too much? Or are your priorities set on just a few key strategies that really matter?

If forced to leave a strategy out of the plan, what would you leave out and why?