

Marketing Tips: Make a Plan



Advertising is more complicated today than ever before, thanks to the Internet and smartphones. Gone are the days when the answer to most advertising questions was some combination of TV, radio and print.

That's why it's more important than ever to spend a little time developing a marketing plan. If it's been a while, consider this a crash course.

Create a measurable objective

What is the purpose of your plan? Do you want to increase brand awareness? Drive consideration? Build loyalty? Convert prospects? Objectives should always be measurable. For example if your objective is to upsell existing clients, establish a baseline before advertising is deployed and measure results post-campaign.

Chances are, advertising will be one of many factors impacting results. The more carefully you're able to isolate advertising's role, the better. One way of doing this is creating a specific call to action that is unique to your advertising, like a website landing page, and track activity during the advertising campaign.

Know your audience

You don't need to reach everybody with your advertising message. You want to reach the right prospects. So spend a little time fleshing them out. Start broad with demographic information. [Census.gov/quickfacts/](https://www.census.gov/quickfacts/) is a great resource. It's a robust, intuitive platform. Examples of demographic information include:

- Age
- Gender
- Marital status
- Education
- Household income

Once you have broad idea of your target market, layer on psychographic information. Demographics tell us who we're targeting. Psychographics tell us why they buy. It's a catch-all for attitudes, values, aspirations, habits, hobbies and lifestyle. Here are a few examples of psychographic data:

- Family, responsibility and success are among their high-ranking values
- News junky, favors cable over local, NPR and Wall Street Journal
- Outdoor enthusiast, hiking, climbing, fishing, hunting
- Takes two vacations annually, always with family, one abroad and another hiking in national parks
- In spare time, golfs, plays tennis, cooks and plays cards with friends

This is a good team exercise. Gather your producers for a 30-60 minute session and arm them with sticky notes and Sharpies. Then consider your primary audiences one by one until you've created complete personas for each.

Consider the competition

Who's playing in your sandbox? Briefly consider the agencies that you regularly compete against for business. What is their value proposition? Are they leaning on price, experience, expertise? Take a pass at their digital assets — website and social channels — to get a broad sense of how they are presenting their brand to prospects.

Determine your differentiator

Once you've sifted through the competition, your differentiator should be more apparent. What is it that your agency can lay claim to that others cannot? Are you the most experienced? The most thorough? The most creative? The more tenacious? Think about how your producers sell your agency. Think about how you attract new producers.

Your differentiator should be organic and true. When you've landed on a differentiator, share it with your team and trusted advisors. If they nod enthusiastically in agreement, you'll know you've hit the mark.

Develop a strategy

Strategy answers the broad question of how your marketing objectives will be achieved. For example, we will increase business owner policy sales by partnering with trade associations. Or, we will increase life insurance policy sales by appealing to new parent values of responsibility, security and safety. For 15 examples of marketing strategies, check out this [blog](#) posted on inc.com.

Get tactical

Now that you have a clear picture of your marketing objectives, target audience, competitive landscape, brand positioning and strategy, you're ready to fill in the details. Tactics are the specific actions you'll deploy to execute the marketing plan. It's where your marketing budget will be spent. Think anything paid, earned or owned. This includes ads — digital, radio, cable and billboard, among others — public relations, and website and social media.