



POINT OF VIEW

Planning for Peaks and Pivots:

Why we should evolve the way we think of detailed marketing plans



Bryan Russiano, Managing Director, Consulting

October 9, 2018

Traditionally, agencies and clients on large engagements can spend up to 6 months building out a detailed plan. By the time it's complete, performance can hardly be assessed and you can forget about implementing many optimizations because it is almost time to start on the next year's plan.

However, organizations now find themselves in states of constant transformation with markets moving, customer dynamics becoming increasingly complex, and media opportunities changing quickly. It's no wonder some marketers are choosing to eschew the traditional yearly brand planning cycle for trendy 1-page Objective-Goal-Strategy-Metric (OGSM) marketing overviews that look exclusively at the big picture. Why write detailed plans once a year that risk being obsolete as soon as they're off the printer?

These marketers use "lean" plans to secure funds during tactical planning season, then make decisions on the fly throughout the year regarding details, such as segments, levers, messages, calls to action, and behaviors on a quarterly, monthly, or even a just-in-time basis. Now, this may sound like a great idea when it comes to staying fresh, but in no way does this approach ensure brand consistency, cohesion, or even long-term effectiveness in the market—particularly when you take into consideration multiple customer types and the integrated strategic effort required to successfully deliver a best-in-class customer engagement program.

I'm advocating for the revival of a new kind of detailed marketing plan—one that not only contains everything needed to execute against brand objectives and strategies, but that also plans for constant evaluation and agile adjustments to in-market forces and learnings.

A well-developed plan with aggressive analysis and optimization built in form the necessary roadmap to quickly and efficiently take brands from the status quo to a period of growth. Rather than prevent teams from responding to change in the midst of larger transformations, this kind of plan keeps the brand looking forward and evolving to meet the needs of the markets, customers, and competition by allowing teams to have the discretionary bandwidth needed to address unanticipated changes as the year unfolds.

How to build an agile yet detailed marketing plan with 3 easy steps:

1

Consolidate customer goals and clearly define the collaborative finish line.

An average health brand today spends marketing dollars on a wide variety of channels, including TV, digital, social, content marketing, personal selling, point of care, and advocacy. More often than not, a separate siloed team is responsible for each customer and channel, creating a disjunction of responsibilities and fragmented, overlapping efforts. Detailed marketing plans can consolidate the knowledge, processes, and tools that exist across teams, as well as create strategic connectivity

(continued)



between customers. Consider it the roadmap, the north star that everything can map back to with the ultimate goal of sales. Use detailed plans to keep all stakeholders swimming in the same direction, working together cooperatively, and rallying around larger strategic success rather than smaller tactical wins. This internal cohesion naturally extends to external partners, allowing precise briefs and effective, evolving execution.

2**Don't lose sight of the customer. Map out each customer's journey and needs and prioritize high-value touchpoints.**

Don't get caught up with short-lived trends and pop-up management queries that lose sight of the actual customer. Many pharmaceutical brands and agencies have made public commitments to deliver customer centricity, but most organizations haven't followed through to create a truly unified experience for the customer. Brand teams are doing breakthrough work on customer ethnography, personas, and segmentation but are challenged by how to carry this knowledge through to execution. Use detailed plans to lay out channels and tactics for each audience segment across the entire customer journey, ensuring the customer is taken care of and reinstated as the backbone of our marketing efforts. Comprehensive plans have given us a concrete foundation to ensure everything we're doing (or not doing) relates to the customer's needs, perceptions, and desires. In other words, we serve customers—not management or fads.

3**Create tailored performance metrics that always work to serve the brand.**

We can no longer rely on the one-KPI-fits-all approach of many of today's oversimplified performance management systems. Throughout the journey of different customer segments, channels and programs will play varying roles, with varying results. Many may even be designed to work in tandem, and the cross-channel impact can affect performance significantly. A nuanced, detailed plan can unpack the many variables at work and the difference in relevant metrics among them. Delineate the action objective, KPIs, and proxies for each tactic across the journey to understand, evaluate, optimize, and manage real business impact on an ongoing basis.

From my experience, it's best not to leave success up to chance. When the runway to growth is now months vs. years, we need to evolve the way in which we think about our marketing plans to better control our path forward. A detailed roadmap should not only guide brands to move beyond steady state, but it should also take in-market impact into consideration and build in the appropriate bandwidth for peaks and pivots.