

HIGHLIGHTS FROM  
The LITTLE  
BLUE BOOK Of  
MARKETING



BUILD A KILLER PLAN  
IN LESS THAN A DAY



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# Contents

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## i. Introduction

WHERE ARE YOU NOW?

WHERE ARE YOU GOING?

HOW WILL YOU GET THERE?

**WHAT'S YOUR PLAN?**

What if you could build a plan that everyone in your organization—from the CEO to the newest hire—agreed on and could embrace...in less than a day!

What if you could build a plan that had clear objectives, identified your priorities, outlined your budget and highlighted critical action steps ...in less than a day!

What if you could build a plan that was perfectly customized to your organization's needs and shaped the direction of your company over the next six, 12 or 18 months...in less than a day!

What if you could build a plan that got everyone in your organization on the same page working toward the same objectives...in less than a day!

What if you could build a plan that put an end to endless meetings, which always lead to more meetings...in less than a day!

What if you could build a plan that would be an easy-to-follow blueprint and action outline for your company or organization...in less than a day!

What if you could build a plan that would be fun to do, get input from all your key stakeholders and bring great ideas to

the surface...in less than a day!

What if you could build a plan customized to your specific needs (i.e., Annual Plan, New Business Startup, New Product Launch, New Web Initiatives, Raise Money For the PTA or even Get Your Kid Into College—you name it)...in less than a day!

That's what *The Little Blue Book of Marketing* is all about: building a smart, collaborative marketing plan that your team can develop in less than a day. You and your team can put together a *Marketing Plan in a Day™ (MPD)* for your company, business, brand, B2B, B2C, startup, not-for-profit, association, organization, club—whatever—in seven hours or less (eight hours if you take a leisurely break for lunch).

No mumbo-jumbo. No complex unreadable spread sheets. Just a simple, clear, concise plan that anyone can understand—and buy into.

And best of all, it's a document you will develop in a single day!

So what's your plan?

"To provide customers with a first-class experience every time they buy our product or service."

No, sorry, that's a Mission Statement.

"To increase sales by 10% over the next 12 months."

No, sorry, that's a Marketing Objective.

"To spend 40% on television, 20% on print and 20% on the Internet."

No, sorry, that's a Budget Allocation.

How are you going to get from where you are to where you want to be? And while we're on the subject, does every-

one in your organization agree on where you are and where you want to be? Got a ready answer to that question?

Competitive pressure, economic upheaval, technological change, global developments (even for mom and pop operations) and digital innovation now more than ever underscore the urgent need for a clear, workable marketing plan. Knowing where you're going and how you're going to get there is vital to your company's success. It always was. It's now more critical than ever.

The Marketing Plan in a Day will get you there—and beyond!

It's simple and comprehensive.

It's fully customized to your business or brand needs.

It encompasses all marketing plan elements that will drive business action: Marketing Objective, Strategies, Brand Positioning, Target Audience, Competitive Factors, Budget, Paths to Market and Action Plan. Whatever you want, whatever you need. And just in case you think those terms are too lofty for your annual bake sale, you'd be amazed how organized and more efficient (shorter) your planning meetings become when you focus your fellow volunteers around all the key issues.

There are plenty of consultants who will come in and live in your company for a month (or two or three) and then pontificate about where you need to be. They leave in a cloud of dust without a clear, easy-to-implement plan of how you're going to get there.

Similarly, there are piles of marketing books and textbooks that go on and on about the minutia of a planning process. Virtually all of them are either impossible to read or opaque

to execute.

Neither consultants nor textbooks will get you where you need to be. In both cases, you're relying on outside expertise to show you how to dig out information you already have.

The simple truth is, no one could do it better than you!

So how are you going to do it? You're going to bring everyone who matters into a room. These are your business stakeholders. Participants will show up at 8am—okay, make it 8:30 for coffee and continental breakfast (ooh, aren't we classy?), 9am for the actual session, and by 4pm they'll leave totally exhausted...and exhilarated. They will have spent one of the toughest days of their careers doing what they've been paid for all along—thinking about your product, your service, your brand, your company, your mission and your goals.

At the same time, they'll leave totally energized. Possibly for the first time in their careers, they'll have a clear understanding of exactly where they want to take your product or service and exactly how to get there. They'll feel immersed in the process and integral to the anticipated results. They'll feel included in a team and empowered to advance the Plan.

During your day, as you proceed to develop the Plan, your session Leader will capture the meeting notes on an easel pad and someone else will enter the notes as slides on a laptop as a first step to building the finished PowerPoint presentation, the Marketing Plan in a Day.

You'll come up with direction and solutions on the spot. You'll pool all the information and knowledge that's in everyone's heads and write it up on the wall so everyone can see it all emerge, evolve and grow in one comprehensive session. Everyone will be committed. Everyone will reach

agreement. Everyone will be ready to take positive action.

Best of all, it will be your Plan. Not ours, not some consultant's, not some textbook exercise. You won't have to go looking for numbers and research and information you don't have in order to complete a "one size fits all" template that some marketing professor or strategic guru has created as a theoretical ideal.

That's what *The Little Blue Book of Marketing: Build a Killer Plan in Less Than a Day* is all about. This is a step-by-step users' manual that will show you how you can lead the session you need for the situation you're in. Your business. Your personalized, customized Plan.

Wow.

Yeah, we know...we're pretty impressed ourselves! Because every time we've facilitated a *Marketing Plan in a Day* all kinds of different magic happens. Time and again we're dazzled by what people come up with in these sessions. It's not something we tell them or show them or teach them or make them fill out. It's the stuff they already know that's lying around in their hearts, minds and files in bits and pieces.

You already have the information.

You already have the expertise.

Applying the *Marketing Plan in a Day (MPD)* can transform your marketing approach and business direction. It can be done. We promise. This book will show you what how your team can "do it yourself." From developing your customized outline to committing to the time place and space for the session, to selecting the key players who will address the issues that need to be solved and putting it all on a Plan

that will strengthen and grow your business.

So take a read. Make your notes. Then bring your company's marketing vision to life. Welcome to the *Marketing Plan in a Day*. You'll never want to do business without it again.

## CHAPTER 4

### The Guest List Is Everything

"Hear no evil, speak no evil—and you'll never be invited to a party."

---OSCAR WILDE

Make sure you've got the right people in the session. Otherwise you're wasting your time.

This idea seems so obvious, but is actually one of the key concepts of the *Marketing Plan in a Day*. Standard operating procedure for most marketing plans is a brand manager develops the plan in a vacuum or refurbishes last year's plan. It's a lonely process and it doesn't tap into the best and the brightest in the organization. Then it goes through an arcane approval process as the ideas are sold in multiple meetings and advanced without complete commitment of all the people in the company who matter.

The most important part of the attendance process is that everyone who'll be part of the real-world end-result decision tree is part of the *Marketing Plan in a Day* session.

These are the stakeholders! Collaboration is the process of the MPD. Consensus is the high ground of the MPD. It can

only be achieved and activated if the key decision makers are integral to the development and sign off on the Plan.

Stakeholders come from all centers and circles of your organization. The MPD should be interdisciplinary. Expertise finds its voice from all corners of your organization. Buy-in across disciplines will make marketing action more robust and so much easier to implement. So the “guest list” is critically important. The meeting can handle as many as 12-15 people.

Who will contribute to the Plan? Who has a point of view on the business? Who has a unique perspective on where you are and where you can go with the business? Who are the action players, the team players? Who are the potential impediments, the roadblocks to action? Get them in the session. An MPD session embraces character, creativity and collegiality. You will learn a lot about your organization and your people in the session. This is an indispensable side benefit of the MPD and will be valuable fuel for future management insights and opportunities.

This is the real world. And in the real world, people who have all kinds of essential or peripheral reasons to be part of the process should be involved:

- If the president of the company is a micro-manager who sees and signs off on every business and marketing decision, he should be part of the session.
- If the EVP of Marketing shows all the new campaigns to her husband for his approval, her husband should be part of the session.
- If you have key vendors who are integral to your plans or likely impediments to them (distributors, ad agency,

brokers, etc.) include them in the session.

- If the Plan is consumer centered, identify an insightful, articulate consumer to join the meeting. If you’re focusing on a youth oriented initiative, get a kid or teen in the room.

We’ve seen MPD sessions where a varied complement of all those people has been in attendance. It’s invigorating. Often for the first time, the team can work with (or confront) an invisible voice that can help enable or scuttle the Plan. Bringing them to the table will be enlightening and efficient by confronting possible Plan pitfalls that the out of house customers (trade, consumers etc.) may react to adversely. That outside person will feel part of the team and can see the impact of what their suggestions have on the group. And, who knows, they may become an invaluable addition to your team for other new initiatives down the road.

Being part of an MPD session makes all participants feel part of the solution. The last thing you want is for your team to spend a day developing the perfect solution only to have someone in the hierarchy—but not in the meeting—kill the whole project because their perspective or goals were different from yours. Ouch! Make sure every guest is a stakeholder and every stakeholder a participant.

We’ve seen any number of unexpected but inspired choice participants in MPD sessions.

## **MARKETING PLAN IN ACTION**

- A major packaged goods manufacturer included the head of their consumer council (an uber consumer) and the account team from their PR firm.

- A startup dot-com invited their principal venture capitalist.
- A consumer goods manufacturer that was a family-owned/run business had three brothers, a nephew and a niece, all in the business, all at the table.
- A foreign-owned manufacturer included the wife of the president who passed judgment on all the advertising and marketing materials produced by the company.

The point is anyone and everyone who has a “yes” in the approval process should be part of the meeting. In the room. For the entire session. It’s not going to be easy. But for goodness sake, it’s only a day or less. People waste far more time in endless meetings that take on the same issues over and over but never seem to result in any positive action. So make the effort, make the calls - and make sure the right people are in the room.

## CHAPTER 6

### Meeting Road Map

“The will to win is nothing like the will to prepare.”  
 ----- JUMA IKANGAA,  
 NEW YORK CITY  
 MARATHON WINNER

No matter what you want to accomplish or how long you’ve got to achieve it, you’re going to need a Marketing Plan in a Day session outline. More than an agenda, it’s an in-depth

roadmap that ensures you cover all of the key issues to meet your marketing plan objective. It’s as easy as 1, 2, 3:

1. Where Are We Now?
2. Where Are We Going?
3. How Will We Get There?

Simple, right? Great! Glad you enjoyed reading the book—we wish you continuing success in the coming weeks and months.

You want more? Phew, you’re a tough audience. But here’s our dilemma: If we give you a really detailed outline, you’ll follow it slavishly and it won’t ever be customized or responsive to your specific needs. On the other hand, if we don’t give you detailed counsel on outline building, you’ll run the risk of building a meeting that won’t fully develop and resolve the issues you’re facing in the time you’ve allotted. That’s the elegance of the Marketing Plan in a Day. How YOU design your meeting guarantees that you’ll resolve key issues based on robust consensus.

So here’s our compromise: The rest of this book will explore these three questions in depth, offering suggestions on how you can draw out the best thinking from your key participant stakeholders in the room. As you read the book, make margin notes or add your notes to Chapter 36 (Sample Outlines) about what points resonate with you and are the most important issues for your group to cover. But answering our overarching three questions—in whatever time frame you commit and whatever priority needs you have—will always be the building blocks for your MPD outline.

Depending on how much time you have and the needs to be addressed, emphasis on each of the three questions will

vary. As you integrate the MPD method into your ongoing business process you'll design additional sessions to dust up, brush up or even overhaul elements of your marketing program that will enrich your business procedures, employee efficiency and marketing success.

At this point you might want to even scribble down the four or five major needs you most want to address in a marketing planning session with your key business stakeholders. You'll find they'll likely be "center stage" in the ultimate outline you'll design and follow as the guide for your meeting. What will you write? Maybe something like this (If the following outline points seem blind right now, they are. Don't panic. We'll be covering each of these outline points throughout the book):

### **1. WHERE ARE WE NOW?**

- a. Business Objective
- b. Brand Positioning
- c. Competition and Competitive Framework

### **2. WHERE ARE WE GOING?**

- a. SWOT
- b. Opportunity
- c. Product Line and Manufacturing
- d. Brand Capabilities and Brand Limits

### **3. HOW WILL WE GET THERE?**

- a. The Big Idea
- b. Paths To Market
- c. Budget Parameters

- d. Marketing Toolbox
- e. Action Team and Partners
- f. Key Milestones and Next Steps

Right away, you're going to get a good handle on your current situation and a Plan build-out. But maybe you believe you have a good handle on Where Are We Now? and Where Are We Going? Then your outline and your day should put much more focus on How Will We Get There? Then your outline might look more like this:

### **1. WHERE ARE WE NOW?**

- a. Business Objective
- b. Competition

### **2. WHERE ARE WE GOING?**

- a. SWOT

### **3. HOW WILL WE GET THERE?**

- a. The Big Idea
- b. Paths To Market
  - i. Who's Our Market?
  - ii. Who's Our Trade?
- c. Marketing Toolbox
- d. The Team
  - i. Dream Team
  - ii. Action Team
  - iii. Partners and Strategic Alliances
- e. Budgets
  - i. Budgeting Methods (Bid It, Brand Available, Share of Category, Task)
  - ii. Budget allocation

f. What Does Victory Look Like?

g. Responsibilities & Timing

i. Milestones

ii. Action Timetable

iii. Who's Responsible?

What outline will be most productive for your business and your participants? Your outline should be your guide, not your taskmaster. It should cover everything you need in your Plan. It should include timing for each section as a test of reasonableness for what you need to accomplish in the meeting time you've allotted (as a general rule, Paul likes to estimate an average of 30 minutes for each major point—some will be 15, some will be 45—plus 15 minute breaks and a ½ hour break for lunch). Remember, it's an intensive session and momentum is important.

Start thinking about your outline right now. Put down some questions you feel your team has to answer. Don't worry now about where they will go in your MPD session. Just jot down ideas you want to cover...and let's move on. When we've covered all the important session issues you need to know about and plan for we'll come back to building the roadmap in-depth in Chapter 36 (Sample Outlines). It's a dynamic and critically important process.

## CHAPTER 11

### Put Up a Parking Lot

“There is no time like the present for postponing what you ought to be doing.”

—XANDER'S PRINCIPLE

Start the session by putting up a Parking Lot. It's our term for an easel page that stays up on the wall near the moderator for the entire day. Title the page “Parking Lot” and explain its purpose to everyone.

During the meeting, ideas will hit the table that are notable, contentious, interesting, enlightening, problematic, enigmatic, promising or inspiring. They'll also be off-purpose. But they will be important ideas worthy of further consideration that people will want to discuss. Let them touch on the subject matter, explain why they think the idea is relevant, then add the item to the Parking Lot and move on.

Don't put a page number on the Parking Lot unless you generate so many ideas that you need more than a single page to capture them. At the end of your session, the Parking Lot will be an Appendix in your final PowerPoint deck.

Don't restrict the Parking Lot to the Leader. Make it clear that at any point in the meeting any participant should feel free to grab a marker and add a submission to the Parking Lot themselves. It's a way to capture good ideas without impeding session progress. That's what the Parking Lot is for. It's the place where you can write down important thoughts for care and consideration at a future date.

The Parking Lot is an important tool that lets you keep control of the meeting, stay focused and on time. Parking Lot issues can be major or minor. They can be small asides or huge problems or opportunities. It doesn't matter. But putting them aside (for the moment) is an important way to keep going.

## MARKETING PLAN IN ACTION

At one MPD session a creative director suddenly thought of a smart way to redesign the company logo. It was an off-meeting/off agenda idea (not unusual for a creative director) but everyone agreed it was an intriguing idea and possible opportunity. It got added to the Parking Lot so no one would forget about it.

At other MPD sessions we've seen new product ideas suggested, strategic alliances, line extensions and other initiatives mentioned that were off topic at that point in the meeting but highly relevant to the business for later in the meeting or for another day.

As you conclude the session you should review the Parking Lot pages together, ask if anyone has any additional items to add, make sure everyone understands all the issues and maybe even assign players who will be responsible for advancing each of the Parking Lot issues. You may well find that the Parking Lot will lead to future MPD sessions. Not uncommon. A Marketing Plan in a Day session is a lot like life: when you deal with one unsolved problem in an organization other related opportunities may arise. Keep the Parking Lot close by and keep the session moving. It's a terrific

tool for making sure that everyone's concerns, issues and suggestions are captured without losing sight of the goal or goal line.

## CHAPTER 26

### Open Your Toolbox

“We shall neither fail nor falter; we shall not weaken or tire...give us the tools and we will finish the job.”

----WINSTON CHURCHILL

Television is no longer the single, dominant form of entertainment in America. Americans under the age of 30 spend more time on their phones and online than they do watching TV or listening to radio. To reach them, you've got to dip into a vast toolbox of new marketing vehicles to meet consumers in their active lifestyles as opposed to the media with which you're most comfortable.

The marketing toolbox has never been so varied. In fact, one of our partners refers to it as a toy box, not toolbox, because of the range of fun choices he now has available to him. Once upon a time, marketing was pretty much bound by the simplicity of what we now call TRaP—Television, Radio and Print. Going to market was a costly proposition and the impediment to market was often the enterprise of the big boys: major marketers with deep pockets.

Today in the digital age any Tom, Dick or Harry (or Bill,

Steve or Sergey) can put a digital shingle out there and be in business. Pretty exciting. And if the buzz of your branded content, Website, YouTube video, blog or Twitter following catches enough of a cool breeze you might not only be in business, you may be in the money on your way to a megahit brand.

So what's the toolbox? It's every way, any way and the integrated way you go to market. What tools will you use to reach your customers, to deliver your product or service, to drive your customer relationship management (CRM)? The tools are changing and expanding every day. Here's a glimpse of what you can reach for today:

## **MEDIUM:**

- Print
- Radio
- Direct Mail
- Outdoor
- Television
- Point of Purchase
- Promotion
- Direct Response
- Infomercials
- Podcasting
- v-Casting
- Blogs
- Mobile Messaging
- Interactive Kiosks
- New Out-of-Home

- Electronic Signage
- Community Sites
- Social Networking
- Banner Ads
- Product Placement
- Affinity Marketing
- Branded Content
- Video Sites
- Webisodes
- Metatags
- AdWords
- Buzz Marketing
- Guerilla Marketing
- AdverGaming
- Virtual Words
- MicroBlogging

Can you do them all? As Paul likes to say, “just because you can doesn't mean you should.” As of this writing, advertisers are rushing off to get involved with blogging and community sites. At the same time we're seeing blog burnout and community site constipation: More and more young people are less and less interested in having 3,000 “friends” in multiple places clogging their lives with meaningless trivia.

So what do you do if you haven't got the money or means to be in all those media? In fact, no one does—not even the deepest pocket mega marketers. Let your Big Idea dictate the points of engagement. The medium and its method are always in the service of the message—the idea. It's got to be simple, elegant and compelling. The media will follow. Once you know what you want to say and who you want to say it

to, then where you say it will become much more obvious.

This explosion of media alternatives is the hottest and most fun, most challenging and most painful issue facing marketers today. Everyone's afraid to give up their traditional media buy: Television, Radio & Print. That's why we call it a "TRaP." Marketers have fallen into the trap of being committed to old media choices that aren't pulling their weight. And in a tough economy or challenging budget situation, the premium on making smart decisions regarding communication platforms becomes that much more important. It's a creative art and a creative act.

We're all often guilty about going with the tried and true. Part of it is your agency's fault. Agency compensation hasn't caught up with new media. In general, agencies don't get paid nearly as well for a digital solution as they do for a traditional media buy. If they don't make a commission on a blog, why tell the client they've got to have one? As a result, companies are faced with different vendors telling them different information: the ad agency, media buying company and digital media company all have different agendas—and different compensation schemes. So who's really looking out for the brand's best interest? And with a fixed (or decreased) budget, companies are reluctant to move away from traditional media to platforms that can't be measured.

**Hint:** Do what Coca-Cola and other global marketers are doing: unify your media planning and digital platforms under one department. Make sure your traditional media people get training in the new media alternatives and make sure your new digital people understand traditional media

planning. Then integrate the whole unit and plan and start reconnecting with the customers you've been losing for the past five years. Break down the silos and integrate your thinking and your operation.

Our toolbox is an interim step for you. By the time this book is published, it will be out of date in terms of tools. There will be new toys and tools for you to place in your consideration set. Bravo. And while the rest of this book is evergreen—you could have used it ten years ago or ten years from now—that toolbox page will feel so five minutes ago each time you confront a new toolbox opportunity. So add your own tools to the list. Keep it up to date, make sure your marketing team knows what each tool is for and does well and keep reaching out across the entire digital landscape.

## CHAPTER 30

### What Does Victory Look Like?

"I think the measure of your success to a certain extent will be the amount of things written about you that aren't true."

---CYBILL SHEPHERD

You're almost ready to assign responsibilities, wrap up the meeting and roll out your new marketing plan. Almost. Because chances are you haven't determined in advance what success looks like. It's a really important strategic decision, for yourself, your partners, your stakeholders, your bosses,

your investors...even your customers. You've got to manage expectations. Set them up front.

## **DEFINE SUCCESS (Workout)**

Have everyone take an index card and write down their single definition of success. What is the one, single thing you want the new marketing campaign to do for your business? Is it increased sales? More leads? More page views? More stickiness on the Web site? More hard orders? More retail traffic? And, what are the \$ results you expect the campaign to yield? After everyone has written down their answer, have them read it out loud and write it down on your easel pad (titled: Defining Success). Review the submissions. Make sure everyone's in agreement. Or spend a bit more time prioritizing the parameters of success. Even though you've gone through almost the complete session with everyone in sync and with everyone starting by writing their goals, you'll be surprised how different their expectations and expressions of success may be. Not everyone will agree on what success looks like, but it's critically important that you pool the good ideas and reach consensus.

Too many times we see companies initiate plans and then hold their breath. What are the criteria for success? Should success be measured in terms of brand awareness? Improved brand attitudes? Increasing brand interest? Sales? Share of market? All of these? The key is to manage expectations. Put the metrics in place to measure the results. And get buy-in that the metrics will be the barometer of success.

## **MARKETING PLAN IN ACTION**

In one MPD session we asked participants what their customers thought of them? What would their customers say about their products and services? Most couldn't answer the question except by talking about overall sales. We suggested that there are many ways they could learn about customer satisfaction. We landed on a range of different—and largely inexpensive—research methods that would not only refine their metrics of success, but also give them guidance on how to improve their offering.

Remember when you were in middle school and you managed your mother's expectation of your report card. You downgraded key subjects so that when the results came in you always performed better. You remember. Your prepared her for the B so the B+ looked really good. It's no different for your business (or a Fortune 500 business). Manage expectations. Perform well, of course. But set your expectations in a profitable but achievable range across clear measurable goals. Under promise, over deliver!

### **Read, Roll, Re-Up**

What does success look like? Once you've achieved the results you've led everyone to believe were reasonable, successful and scalable it's time to raise the bar. What does big success feel like? Only you can know. But if the goals you've achieved are on par with your most conservative projections, feel a quiet sense of relief and get back to work. You know that's not good enough!

How does success get measured? What's success worth?

How can you recommend the expansion of success? These are all questions you need to identify up front, calibrate clearly and measure cleanly. You want to win on sure ground. Failure is not a deathblow, it's an honest moment in time that can be revised, reordered and redirected—if you've set the stage for understanding the parameters of failure as effectively as you've set the goals for success. Not everyone wins the first time out.

One of the issues you want to address as your marketing plan moves forward is whether you've got the underlying premise right. If you do, then failures are the result of the message proposition, not the marketing plan. P&G is a master of understanding the difference between message failure and marketing failure. P&G in its great marketing wisdom has encountered and vanquished a number of failures along the way. Time after time, not content to take failure as a final answer, a number of their brands prevailed big time to become huge category winners through revision and recalibration.

Pampers introduced the first disposable diaper. Seemed like brilliant idea. Yet launch after launch failed to get the product going. “Convenient.” Nope. “Disposable.” Nope. “Less Mess.” Nope. Eventually, P&G found the winning message: “Keeps Your Baby Drier.” And suddenly they had a hit. Because new moms weren't motivated by benefits for themselves, the winning communication was embracing moms' commitment to doing the best for their babies. And that became the winning value proposition. Once P&G landed on the sweet spot for babies and new moms, they had a hit.

Ditto Pringles. Pringles was a disaster first time out and several times after that. Yeah, stackability was a nice idea. But this was potato chips—food! If the product didn't taste any good, the convenience factor was a non-starter. Reformulation after reformulation and great tasting, very convenient, non-oily Pringles became a great and growing success. Taste was the ante. All the other wonderful P&G innovations were merely icing on the cake.

So before you leave the session, make sure everyone in the room agrees on what “success” will look like. That way, you can all have a yardstick against which to measure your results. And as our partner, Jeff Woll, always preaches: “You can't manage what you don't measure.” If you don't know what you want, how will you know when you get it?

## Chapter 37

### Sample Timelines

“Time is time and money is money.  
If you want to save one it's always going to cost you  
the other.”

—STEVE LANCE

Can't get everyone for a whole day? Better to take what you can get rather than not assembling the troops at all. Would we love to see every Marketing Plan in a Day run a full 7 hours? Absolutely. It will save you hundreds of hours of meetings down the road. But if you haven't got all day, there's still good ground that can be covered in less time:

- 2-Hour Marketing Plan
- 4-Hour Marketing Plan
- Marketing Plan in a Day
- 2-Day Marketing Plan

## **2-HOUR MARKETING PLAN**

Two hours is a reasonable amount of time to do one of two things: You can either focus on big picture strategic issues or drill down into a single marketing plan initiative. Big picture strategic initiatives can include setting marketing objectives, establishing time frames for marketing goals, setting a vision, mission or positioning. Two hours is not sufficient time to spin out the entire Plan. But accomplishing the big picture issues can set the stage for a next meeting. A sample outline might include:

- Business objective
- Vision
- Brand Capabilities
- Brand Positioning

Or you can designate a 2-hour planning session to take on specific issues in the Plan or to outline specific progress toward implementation of a Plan element. Examples here might include assessing potential strategic partners, appropriating a budget for communication tools, reassessing milestones, timing and responsibilities. Two hours is a great time frame for confirming and building details into the Plan to ensure smart progress and efficient action.

- Budget
- Communication priorities
- Communication tools

- Milestones
- Timing
- Responsible

## **4-HOUR MARKETING PLAN**

Four hours provides a good opportunity to do some heavy lifting on key strategic issues of the business. This is a good time frame for a deeper dive into market situational dynamics, a detailed SWTO analysis leading to positioning refinement or a discussion on key stakeholders to advance the Plan. Here too, the time frame provides the opportunity to probe in greater detail executional elements of the Plan and how to advance them. A very focused and aggressive 4 hours can accomplish some variation of the following:

- Business objective
- Vision
- Situation analysis
- Competitive frame
- Brand capabilities
- SWTO analysis
- Brand Positioning

## **MARKETING PLAN IN A DAY**

This is the recommended form for a complete look at your marketing plan for the coming year or a specific period of time. The 7 Hour form (with perhaps an extra hour for breaks, lunch etc.) is sufficient time for you to map the blueprint of your entire plan for the year. This is the form on which we focused this book and is the most elegant time frame to really tackle your complete marketing in challenge

in a day. It's the recommended form because it is intensive, collegial, exhausting and exhilarating. The basic outline covers your variation of the following:

- Meeting Objective
- Vision
- Mission
- Competitive Frame
- SWOT
- Positioning
- Budget
- Paths to Market
- Media Selection (Toolkit)
- Strategic Partners
- Milestones
- Responsible
- Timing/Next Steps
- Parking Lot

## **2-DAY MARKETING PLAN**

The two-day marketing plan is a wonderfully elegant form to breathe air into the Marketing Plan in a Day or to add elements of creative brainstorming and ideation to the strategic process. In two days you can do one of two things:

1. A Marketing Plan in a Day broken into two pieces with opportunities for team-building activities in between. For example, work one morning, have a golf outing and dinner in the afternoon and evening and wrap up the next morning. Or start the afternoon of day one, have dinner and wrap up the morning of day two. Or do a team building exercise the morn-

ing of day one, work on the 7 Hour Plan in the afternoon, have a dinner and finish the Plan the next day with more team building in the morning or afternoon. During Day Two give participants free time in the morning, a specific assignment (e.g. store checks) to fuel the afternoon session on paths to market, strategic alliances, etc. The combinations are endless.

2. A Marketing Plan in a Day with executional direction and ideation built into a solid two days. This extends the outline from strategic issues into specific executional solutions. It's a great form if you can commit the time. And it's a great time saver if you do. Imagine not only "nailing" your mission, vision, positioning, marketing goals and more but also additionally landing on an insight, an idea and an executional direction to implement to achieve your marketing objectives. We've done it. It's illuminating, empowering and very productive.

## **PAUL KURNIT AND STEVE LANCE**

For nearly ten years, Paul Kurnit has been conducting Marketing Plans in a Day for a wide range of companies and start-ups. Before becoming an independent marketing consultant, Paul's career included managing the global business for Hasbro as president of DDB advertising agency, Griffin Bacal. While at Griffin Bacal, Paul started relationships with new clients by conducting simple, collaborative, in-depth analyses of their business. It was that process that grew into the Marketing Plan in a Day.

Prior to Griffin Bacal, Paul learned his marketing craft at

Benton & Bowles and Ogilvy & Mather working for several of the finest marketing organizations in the world: Procter and Gamble, American Express and Kraft/General Foods and Hasbro. Paul adopted a very simple philosophy: great marketing and advertising only happens when everyone involved is working off the same set of plans and goals. There are no brilliant, game changing ideas without inspired strategic direction and a creative marketing plan to drive great results. In addition to stewarding a range of top brands, Paul has written and spoken extensively about marketing, strategy and creative innovation at conferences, in print and on TV and radio interviews.

Paul is also founder of KidShop and Kurnit Communications and Professor of Marketing and Advertising at Pace University. Throughout his career, Paul has been dedicated to growing businesses through powerful strategic initiatives that have been translated into inspired marketing communications programs.

Steve Lance has spent nearly 30 years in advertising and marketing on the creative side of ad agencies and television networks, including creative director of NBC; associate creative director of Backer and Spielvogel; and creative director of the entertainment division of Della Femina, Trivisano and Partners. He's created or been associated with some of the most memorable campaigns in television, including *The More You Know* for NBC and *Shark Week* for Discovery Channel. He's won numerous creative awards for his campaigns, including Emmy, One Show, Aurora, Mark and Lifetime Achievement Awards. He's been a member of the

board of directors of The Copy Club of New York; a guest lecturer on promotion and advertising at universities, clients and advertising clubs across America and he's co-author of "The Little Blue Book of Advertising" (Penguin/Portfolio 2006).

Over the years, we've seen the pointlessness of creating advertising for clients who don't know what they're trying to achieve. The greatest ads in the world won't do a thing for a company unless the organization knows exactly where they want to go and how they plan to get there. As seasoned business, marketing and creative guys, we're independent thinkers who've been on the inside and the outside of big and small businesses, marketing, creative and entertainment organizations. As impassioned observers, bloggers and speakers about the cross currents of marketing practice with life experiences, we understand that nothing gets accomplished without a clear roadmap. And finally, as a couple of guys with Attention Deficit Disorder (Steve's diagnosed, Paul refuses to find out), we're impatient with wasting time or not moving smartly forward in life or in business. In 2007 we founded PS Insights with our partner, Norman Siegel ([www.psinsights.com](http://www.psinsights.com)). And since then, we've been developing speeches, presentations, workshops, training programs, marketing, branded content and creative solutions for companies who share our vision of team focus and planning to drive personal satisfaction and impressive business growth. PS Insights is committed to helping companies of all sizes uncover the insights they already have about their business but can't seem to be able to bring to market. PS Insights

is about helping those companies bring those ideas to the surface.

We invite you to join the conversation at [PSInsights.com](http://PSInsights.com) or e-mail us:

[Paul@psinsights.com](mailto:Paul@psinsights.com)

[Steve@psinsights.com](mailto:Steve@psinsights.com)

You'll also find us on Facebook, Twitter, LinkedIn and just about every social networking community. And if there's some new technology out there that hasn't been developed as of this writing, we'll probably be there, too!

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