

# **PLANNING TEMPLATE**

A template to help you map, plan  
or manage your digital marketing

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# Digital marketing strategy

## Planning Template



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# Introduction

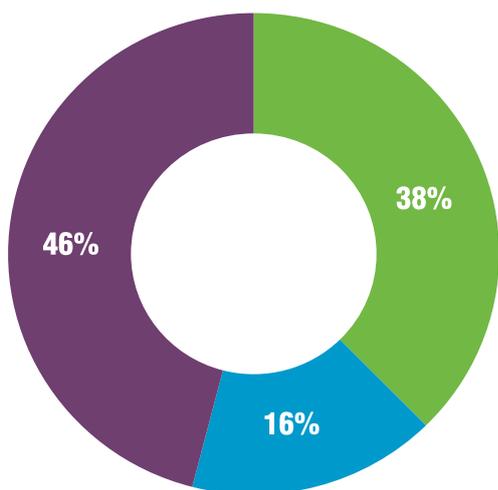
## How to use this RACE Planning Template

### Welcome

Thanks for downloading this Smart Insights template. We hope you find it useful when creating plans to make more better use of the fantastic opportunities available from digital marketing. It's a sample of a wider selection of our advice for marketers including 7 Steps Ebooks; online training courses; how-to-videos and marketing templates. [See the full range of content used by our Expert members.](#)

Our recent research showed<sup>1</sup> that shockingly, many organisations are doing digital marketing, but they don't have a strategy. The reality is that digital channels are still relatively new, so many businesses haven't responded. We found that a majority of organisations responding now use a planned approach to digital marketing, but many still don't.

### Q17 Does your organisation have a clearly defined digital marketing strategy



- Yes - it's integrated into our marketing strategy
- Yes - it's defined in a separate document
- No - we are doing digital marketing, but no defined strategy



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Congratulations on taking steps to improve your digital strategy! We believe that you need to first define a separate digital plan to make the case for more investment in digital marketing and change your approach to managing digital marketing. Then move to a better integrated approach where it's part of your marketing strategy.

#### Strategy Recommendation 1 Create a specific digital marketing plan!

Create a detailed digital marketing plan defining the digital channel strategy for each major market / proposition to provide focus and direction for the future.

Make sure your digital plan is well integrated with all marketing communications and aligns with your business objectives.

1 [Smart Insights Managing Digital Marketing 2014 research report \(available to all members\)](#)

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## Some general advice to keep in mind when planning

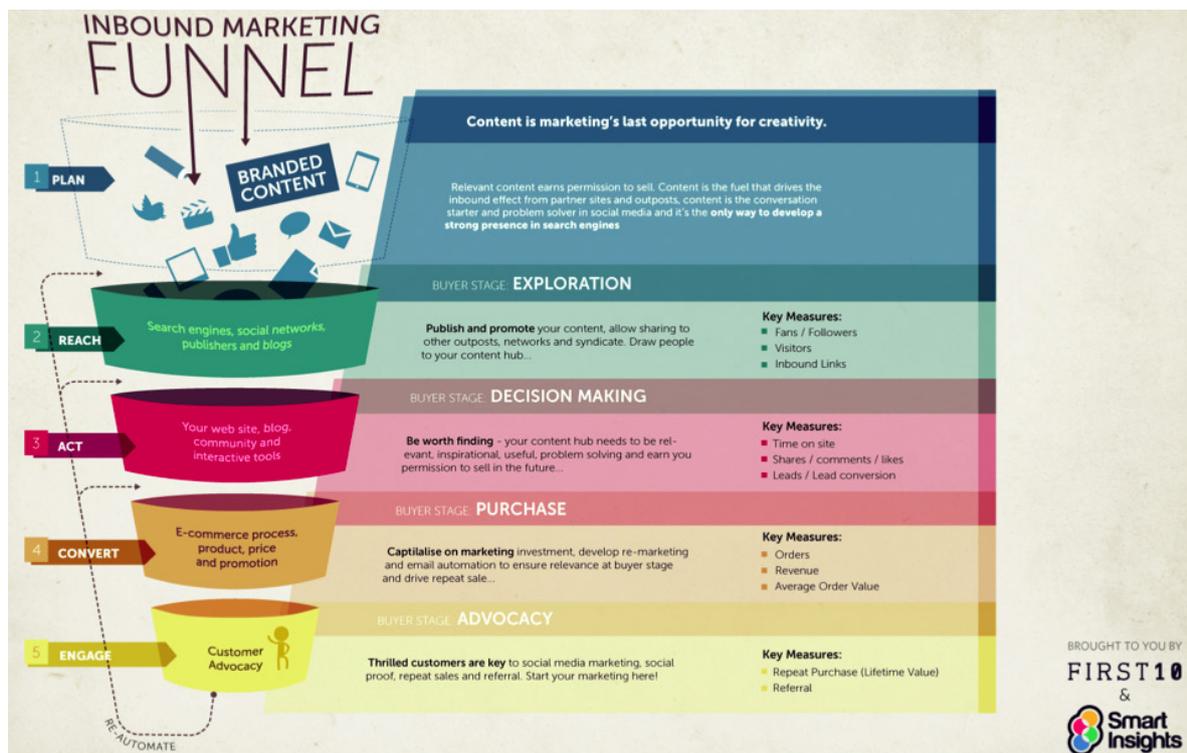
Digital marketing planning is no different to any other marketing plan, in fact it's increasingly strange to have separate plans for 'digital' and 'offline' since that's not how your customers perceive your business. However, we're often required to separate plans for "digital" only based on the way teams and reporting is structured and to make the business case for transformation to digital business so that it can become part of "business as usual".

- ✓ **Start with the customer.** Build your plan around customer insights and needs – not around your products and tactics.
- ✓ **Keep it flexible.** Situations and plans change, especially online, so ensure plans are usable by a clear vision for the year and keeping detail to a shorter term 90-day focus.
- ✓ **Set realistic goals.** Include specific SMART objectives in your plans but keep them realistic by basing them on insights from your analytics, so they're easy for others to buy into.
- ✓ **Keep it Simple!** "Jargon light" is best. Again it helps others buy into what you're saying.
- ✓ **Keep plans up-to-date.** Review and update regularly. We recommend [90-day planning](#) of key activities and review against analytics dashboards.

## Creating a structure for your plan

Knowing where to start is often the hardest thing when writing a digital marketing plan. So once you have a structure / framework to follow in a table of contents, it's then almost a matter of filling in the gaps...

At Smart Insights we developed the [RACE™ planning system](#) to help create actionable plans that improve commercial results using integrated digital communications based on marketplace insight and analytics. Our inbound marketing infographic recommends activities and KPIs to use in the table for each stage of RACE.



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Use the interactive version of the RACE Planning framework at <http://bit.ly/smartrace> to navigate to our advice on our free hub pages for each key digital marketing activity. We have developed hub pages as a 'one-stop shop' covering all the key areas of modern marketing. They feature our member advice and the latest guidance and stats from our blog posts to help keep you up-to-date and inform your strategy.

This template is structured using RACE™ digital marketing planning system, but you will also find PR Smith's [SOSTAC®](#) planning tool which we cover in the next section useful.

### Creating a brief, focused digital plan

Your plan will be most effective in showing the actions needed if it's brief. We recommend using the single page summary shown on the next page. For each part of RACE™ use this table to summarise the key points of your plan:

- ☑ **Opportunity.** Quantifiable SMART objectives based on your analytics and market insights. State your assumptions and what informs your objectives.
- ☑ **Strategy.** Where you will focus your resources and investment to hit your targets.
- ☑ **Action.** Managing tasks to implement your strategies.

RACE activity	Opportunity	Strategies	Actions
1. Plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Reach.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Act.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Convert.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Engage.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Recommended resource? Digital marketing strategy toolkit templates for Expert members**  
 Develop your strategy using our [Digital marketing toolkit](#) templates to prepare a customised plan. Amend the unbranded Word, Excel and Powerpoint templates to create a plan for your business or your clients' businesses.  
 See our [digital marketing plan examples](#) downloads for examples of how to create your summary action plans.



# ONE. PLAN

## Create a digital marketing strategy

### Opportunity: Review marketplace and set objectives

There are 5 key activities to define your digital opportunity through marketplace analysis:

- [1. Set objectives and review performance using summary dashboards and KPIs](#)
- [2. Customer insight summarised in customer personas and customer journey maps](#)
- [3. Benchmark competitors](#)
- [4. Review influencer and intermediaries](#)
- [5. Audit brand strength with the marketplace](#)

### Strategy: Create digital strategy

Review how your digital proposition and communicate it using digital targeting techniques:

- Select target market segments and personas. Define digital targeting approaches.
- Define your online value proposition (OVP) including review of business and revenue model, brand positioning and integration with traditional channels.
- Review marketing mix for options to vary the 4Ps of Product, Price, Promotion and Place.

### Action: Implement and manage digital marketing communications

Optimise your digital communications across all key customer touchpoints:

- Reach:** Build your audience by integrating paid, owned and earned media.
- Act:** Using content marketing and persuasion to prompt brand interaction and leads.
- Convert:** Use conversion rate optimisation to boost online and offline sales.
- Engage:** Develop customer loyalty and repeat sales.

### Using SOSTAC® planning

[PR Smith's SOSTAC® Planning System](#) gives a great framework for business or marketing plans since it's simple and logical, so it's easy to remember and to explain plans to colleagues or agencies. We recommend the simplicity of Opportunity > Strategy > Action.

#### What is it? SOSTAC®

SOSTAC® is a planning process framework to help structure and manage implementation of plans. It stands for Situation, Objectives and Strategy, Tactics, Action and Control originally developed by PR Smith for marketing communications planning. In their book *Emarketing Excellence* Dave Chaffey and Paul Smith have adapted the SOSTAC® framework to apply it to digital marketing as shown in the infographic on the next page.

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# The SOSTAC® Planning System

## HOW DO WE MONITOR PERFORMANCE?

**Optimising through:**  
 5 S's, KPI's and web analytics  
 User experience review  
 Conversion rate optimisation  
 Frequency of reporting  
 Process of reporting and actions

## WHERE ARE WE NOW?

**Marketplace SWOT:**  
 5 S's performance and other KPI's (& trend)  
 Customer insight (who, why, how?)  
 Market Trends  
 Competitor analysis  
 Internal capabilities and resources

## WHERE DO WE WANT TO BE?

**5 S's objectives:**  
**Sell** - customer acquisition and retention targets  
**Serve** - customer satisfaction targets  
**Sizzle** - wow factor (added value)  
**Speak** - engaging customers  
**Save** - quantified efficiency gains

## THE DETAILS OF TACTICS

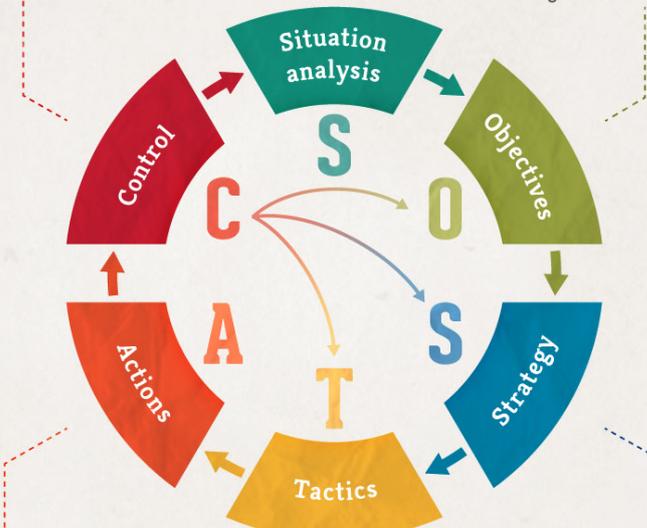
**Who does what and when:**  
 Responsibilities and structures  
 Processes and systems  
 Internal resources and skills  
 External agencies

## HOW EXACTLY DO WE GET THERE?

**Marketing mix:**  
 8 P's  
 Incl. Communications Mix  
 Content Plan  
 Contact Plan

## HOW DO WE GET THERE?

**STOP & SIT:**  
 Segments  
 Target markets  
 Objectives  
 Positioning (OVP)  
 &  
 Sequence (Trust, Try, Buy...)  
 Integration (CRM & D/Base)  
 Tools (e.g. SEO, PPC)



Created by PR Smith, SOSTAC® is a simple yet powerful planning system, which is easily applied to help create the perfect plan. SOSTAC® is a registered trade mark with SOSTAC® eBook, workbook, webinars & workshops by PR Smith: [www.PRSmith.org](http://www.PRSmith.org)

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# TWO. REACH

## Grow your audience online

### Opportunity: Define your online audience potential

Set realistic targets for building traffic, awareness and social media followers

- Define dashboard to review effectiveness of current digital media in analytics
- Review current use of digital media and opportunities to improve
- Set VQVC (volume, quality, value, cost) objectives using [conversion budget models](#)

### Strategy: Select the best communications options

Your online customer acquisition strategy should:

- Define key brand messages to grow audience awareness, familiarity and purchase intent
- Select relevant targeting approaches
- Develop content marketing approach
- Define channel integration
- Prioritise where you will spend, summarised using a media plan and budget

### Action: Optimise your digital communications

Work on optimising the key digital communications for your business:

- Optimise SEO
- Optimise or review relevance of Google AdWords (paid search)
- Review opportunities from Display Advertising
- Review relevance of affiliate and partner marketing
- Social media marketing optimisation

#### Recommended resource? Search and social media marketing guides

We believe that search and social media marketing are the most important channels for growing your audience cost-effectively. See our detailed 7 Step Guides to these channels for a DIY approach to improving their effectiveness or reviewing with your agency/clients:

- [Search Engine Optimisation \(SEO\) 7 Steps Guide](#)
- [Google Adwords Paid Search 7 Steps Guide](#)
- [Social media marketing 7 Steps Guide](#)

We also have in-depth guides on marketing using all the [major social networks](#).

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# THREE. ACT

## Encourage brand interactions and leads

### Opportunity: Identify best options to increase lead conversion

- ❑ [Review customer journeys](#) for desktop and mobile sites
- ❑ Review social media and [mobile marketing](#) platform engagement
- ❑ Define goals and dashboards for measuring and review customer interactions

### Strategy: Prioritise content marketing and customer journeys

- ❑ Define customer personas (see our [Personas toolkit](#))
- ❑ Define [content marketing plan](#)
- ❑ Create plans for engaging on social media and mobile marketing platforms

### Action: Manage content marketing and lead generation

- ❑ Create campaign plan, [editorial calendar](#) and outreach plan
- ❑ Create content assets including [video marketing](#)
- ❑ Create [landing pages](#)

#### Recommended resource? Content marketing 7 Steps Guide

Use our [content marketing strategy guide](#) to define an integrated inbound plan based on selecting the best types of content for your business using this matrix.



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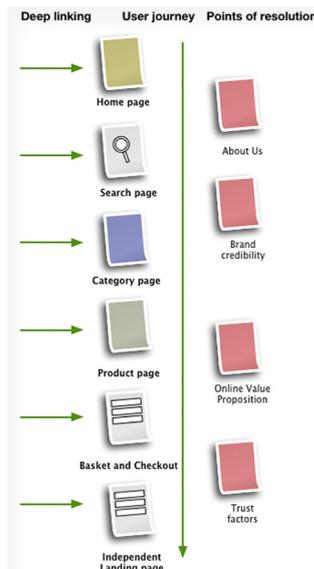
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# FOUR. CONVERT

## Increase sales through optimisation

### Opportunity: Review focus to increase conversion to sale

- ❑ Create and review site conversion funnels and paths to purchase (online and offline)
- ❑ Review multichannel (omnichannel) interactions to increase revenue per visit
- ❑ Review customer feedback (Tools in post: <http://bit.ly/smartfeedback>)



### Strategy: Create an approach for conversion rate optimisation

- ❑ Define online conversion rate optimisation (CRO) approach
- ❑ Define how key online communications (search, email, social, mobile) drive sales
- ❑ Define offline integration paths to purchase

### Action: Manage continuous improvement of conversion

- ❑ Implement site or [Ecommerce sales optimisation based on analytics](#)
- ❑ Implement CRO through test plan for AB and multivariate experiments
- ❑ Implement behavioural email programme (See [Email hub page](#))

Recommended resource? [Ecommerce Success Mapping](#)

Our [Ecommerce Success Mapping template](#) can be used as a management tool to help you review and work on improving the key factors that drive online sales.

Recommended resource? [Improving results from your website 7 Steps Guide](#)

Our [improving results from your website guide](#) shows how to review your key customer journeys and brand messaging for quick wins to help boost conversion.

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# FIVE. ENGAGE

## Build customer loyalty and advocacy

### Opportunity: Review potential to increase customer activity levels

- Review customer loyalty using RFM analysis for interactions and sales
- Review customer satisfaction drivers
- Review effectiveness of customer communications

### Strategy: Define plan to improve customer retention and engagement

- Create customer engagement plan
- Create online personalisation and merchandising plan
- Create customer contact plan (email marketing and social media marketing)

### Action: Implement customer communications

- Implement or refine personalisation rules on desktop and mobile sites
- Implement or refine event-triggered personalised emails and newsletters
- Manage social media and email campaigns for customer engagement and advocacy

#### Recommended resource? Smart Insights Email and Social Media marketing tools

Email marketing remains a core customer communication technique, especially when integrated with social media marketing. Our recommended guides and templates are:

- [Email marketing 7 Steps to Success Guide](#)
- [Email marketing audit template](#)
- [Email marketing campaign templates](#)
- [Email contact strategy template](#)
- [Social media marketing 7 Steps to Success Guide](#)
- Detailed guides to Facebook, Google+, Pinterest and Twitter marketing

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# RESOURCES

## Tools to help you create and implement your plans

### Benchmark your capabilities compared to your competitors

We're big fans of scoring the current digital marketing capabilities of a company, so you can show your colleagues how your different digital marketing activities rate now and how they need to be improved in future. This is a core technique for arguing for additional investment in digital marketing and for reporting on progress.

#### Recommended resource? Smart Insights Benchmarking Tools

We have developed a series of tools to help develop strategy and to make the case for more investment in digital marketing. These are:

- ✔ [Digital Strategy Toolkit](#). Expert members can download examples and editable template as part of our which includes *Powerpoint*, *Word* and *Excel* templates to help build your marketing plan and explain to colleagues or clients.
- ✔ [Digital Marketing Healthcheck](#). Score your company or clients in the 5 key areas of RACE Planning. This is more suited to small and medium sized companies and is available free for use by Basic members.
- ✔ [Digital marketing audit](#). A more detailed spreadsheet based technique for assessing a company in 6 key areas. More suited to larger organisations or use by consultants.
- ✔ [Business case template](#). Improvement needed can be justified through this template and the companion Ebook.

▶ [Upgrade to Expert membership! View the full range of Expert member resources](#)

### All the best for your journey to make the most of digital marketing

Creating or refining a plan is just the beginning of the journey to making the most of digital and social media. We hope our guide has helped you on your way?

Please let us know any questions you may have through our free [Digital Marketing Answers Forum](#) or through our [support desk](#).

Thanks, *Dave Chaffey*, *Dan Bosomworth* and the Smart Insights team.

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## About our 7 Steps digital marketing guides

### How will the guides help me?

We've created our [7 Step Guides for Expert members](#) to be your constant companion as you learn, review and improve your approach to digital marketing. We know you're busy and under pressure to get results, so they're written to help you do just that. They take you through the questions you should be asking to improve performance and suggesting the right approaches for you.

Our Ebooks are all created to help you:

- ✔ **Improve results.** A focus on getting the best results from your digital marketing.
- ✔ **Review your current approach.** A unique workbook format helps identify priorities.
- ✔ **Apply analytics.** Integrated advice on using Google Analytics to improve performance.
- ✔ **Learn best practice.** Strategy recommendations and practical tips highlighted throughout.

### Who are the guides written for?

Our Ebooks are designed to help you and your team if you are actively managing digital marketing. They are also packed full of practical advice if you're working hands-on on a company website or campaigns like search, email or social media marketing. This is how our guides are designed to help different types of people map, plan and manage their digital marketing:

- ✔ **Company owners and marketing managers.** We help you create or refine plans so you can invest in the approaches that matter most. We help you set goals and put in place a system to measure and improve since all our guides cover how to get more from Google Analytics.
- ✔ **Digital marketing and Ecommerce managers.** We help you drive efficiencies from each of the key digital marketing channels plus your web and social presences through reviewing your approach using using our comprehensive workbook templates.
- ✔ **Digital marketing specialists.** Whether you work on social media marketing, SEO, PPC, email marketing or conversion rate optimisation for the website we have a guide to quickly help you review and improve your approach.
- ✔ **Consultants and agencies.** Many consultants and agencies use our guides to check and refine their approach and recommendations to clients on digital marketing. They're also used to help educate team members on the latest digital marketing best practice and techniques.

### Guide features

All our guides include these features to help you improve:

- ✔ Checklists of questions to ask to review your marketing approach
- ✔ Guidance on using Google Analytics to improve performance
- ✔ Colour-coded **definitions**, **key strategy recommendations** and **best practice tips**
- ✔ Diagrams giving frameworks to develop your strategy
- ✔ Lots of examples of best practice through mini case studies and screen captures

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