Corporate Marketing Plan

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# By Lindsay Diven, CPSM

Lindsay Diven, CPSM manages the Marketers Take Flight blog, which focuses on helping marketers new to the engineering, architecture, and construction (AEC) industry acclimate. She shares her lessons learned and processes with readers so they can become successful in their AEC marketing careers.

She went from a marketing coordinator new to the industry to a Marketing and Business Development Director responsible for managing a nearly $70 million sales goal and team of 12, during the recession. Now an award-winning marketer, she believes that helping new marketers acclimate specifically to this industry helps the entire industry.

She graduated with a Bachelor of Science in Marketing and lives in Orlando, Florida with her husband and two children. Outside of work she is an avid college football and baseball fan.

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11. Executive Summary

*Should be completed last. Summarizes the other sections of your plan. Helps the executive team and implementing team members quickly understand and support the plan.*

1. Historical Overview
   1. Performance and Historical Trends

*This includes a summary of achievements accomplished in current year.*

1. Market Summary and Analysis

*What is your firm’s position in the marketplace? What is your firm’s overall growth strategy (geographic or market growth, organic or inorganic, etc.)? If you have a long-term strategic plan, what year are you in and how does this annual corporate marketing plan support that long-term plan?*

* 1. SWOT Analysis
     + SWOT Definition
       - *Strengths are competitive advantages or core competencies that give the organization an advantage.*
       - *Weaknesses are limitations a firm has in developing or implementing a marketing strategy.*
       - *Opportunities are favorable conditions in the market place that could yield rewards for your firm, if acted on properly.*
       - *Threats are conditions or barriers that may prevent the firm from reaching its goals.*
     + *SWOT in Action*
       - *During the development of the marketing plan, marketers attempt to match internal Strengths to external Opportunities. In addition, they try to convert internal Weaknesses into Strengths and external Threats into Opportunities.*

1. Objectives
   1. Short-Term Goals
      1. *These are the goals for the current year. It can include goals that cover business development, communications/PR, knowledge management, new technologies, etc.*
      2. *You should list here any firm-wide initiatives related to marketing your firm. These can include new branding, website, anniversary campaign, acquisition/merger, etc.*
   2. Long-Term Goals
      1. *These are the goals for the next 1-3 years. How will your office/market look like? What kind of new clients and/or project-types will you be pursuing?*
      2. *This is usually just narrative.*
2. Action Plan (Marketing Mix)

*The marketing mix section should provide considerable detail regarding various marketing and BD activities. There should be a plan of action for each short-term goal listed in the previous section.*

*This section should detail each activity, who will be leading, the estimated budget, and desired outcome or goal.*

1. Training and Professional Development

*List any and all training provided to seller-doers, business development and marketing staff for the upcoming year. List any internal training and that conducted by outside consultants. Some topics can include:*

*• Client Management Roles and Responsibilities*

*• Positioning to Win/Capture Planning*

*• Networking*

*• Preparing for Client Visits (Call Planning)*

*• Proposal Planning and Management*

*• Presentations*

*• Building Strong Client Relationships through Debriefings*

*• Social Media*

*• Thought Leadership*

1. Organization Involvement

*Form a corporate level, list the key organizations that will expand your brand recognition and build relationships with key decision makers. List the location, organization and firm representative(s).*

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| --- | --- | --- |
| **Location** | **Organization** | **Appointee** |
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1. Marketing Budget

*Use the following table to complete your marketing budget. There should be a budget for each initiative listed in your Action Plan (Marketing Mix) section.*

| **Marketing Mix** | **Item** | **Cost Components** | **Total (Corporate Marketing)** |
| --- | --- | --- | --- |
| **Personnel** | | | |
| Marketing Coordinators | How many full and part-time staff members? |  |  |
| Business Developers |  |  |  |
| Graphics |  |  |  |
| Communications |  |  |  |
| Manager/Director |  |  |  |
| Support |  |  |  |
| Subtotal: | | |  |
| **Communications** | | | |
| Awards | Submit communications and project awards |  |  |
| Website | Fee for agency to develop program and train communications team |  |  |
| Brand Launch | Misc. items for the brand relaunch |  |  |
| Subtotal: | | |  |
| **Market Research** | | | |
|  |  |  |  |
| Subtotal: | | |  |
| **Graphics and Technology** | | | |
| Project Photography | Photography up to 5 projects |  |  |
| Equipment | Various camera and production related equipment |  |  |
| Conference Graphics | Development and equipment for 3d virtual reality. |  |  |
| Subtotal: | | |  |
| **Conferences/Events** | | | |
|  |  |  |  |
|  |  |  |  |
| Subtotal: | | |  |
| **Organizational Involvement** | | | |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Subtotal: | | |  |
| **Training & Development** | | | |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Subtotal: | | |  |
| **Corporate Marketing Total:** | | |  |

9. Department Organization & Responsibilities

*Describe how your corporate marketing department is structured and organized. Include an organizational chart if applicable.*

10. Reporting

*Summarize the reporting developed by the marketing department to demonstrate the ROI of this plan as well as sales/business development effectiveness. Provide a summary of who will develop the report and frequency of each report. A list of potential reports could include:*

* *Monthly Marketing/Sales Report – A summary of the sales contracted and marketing expenses compared to established goals and budgets. Prepared by the Marketing Director and distributed to CEO/President, Principals, etc.*
* *Communications Quarterly Report – Measure the impact of a variety internal and external communication efforts including website traffic, social media, media placements. Internal engagement, etc.*
* *Hit Rate Report – Quarterly report to show the win rate and distributed to the executive team.*

# Conclusion

This isn’t all the material I have to develop systems to get more work done. If you have found this information useful, then I encourage you to visit the **Market-*ers* Place** on the Marketers Take Flight website for other helpful information such as other Self-Starter Kits, Mini-Workshops, and Premier Courses+Coaching. The ultimate goal is to help you not only acclimate to the marketing department, but get promoted faster. Join me at: www.marketerstakeflight.com.