7 Steps to Successful Marketing Planning

The essential steps to building, executing, and optimizing a successful annual marketing plan, from strategy to performance measurement.

Campaign planningFinancial planning



	Strategize	Execute	Measure			
Align with Company Goals	Set marketing goals based on to dentify one primary growth Make a prelimin		S			
Set Campaign Architecture	Align	ampaign hierarchies and metrics all stakeholders, including finance, on ate budget based on strategic priorities				
Plan Key Campaigns	Set target groups, messages, and budgets for each campaign Create impact models to validate campaign performance targets High-level budgets for essential programs and activities					
Bottom Up Plans		Balance activities across all four program families for well-rounded campaigns Plan budget distribution across quarters and program activities Organize tasks with the right tools, people, and timing across channels				
Set Final Budget		Use zero-based budgeting to justify every expense based on impact Adjust campaign plans based on final budget from finance Verify campaign impact models with the revised budget				
Execute Campaigns	Establish consistent budget tracking and reconciliation processes. Hold monthly financial reviews to monitor spend against targets Share the marketing plan in real time with all stakeholders					
Check ROI and Optimize			Compare actual ROI to	forecasted figures for bu	anges and competitor activity Idget optimization Optimization opportunities	