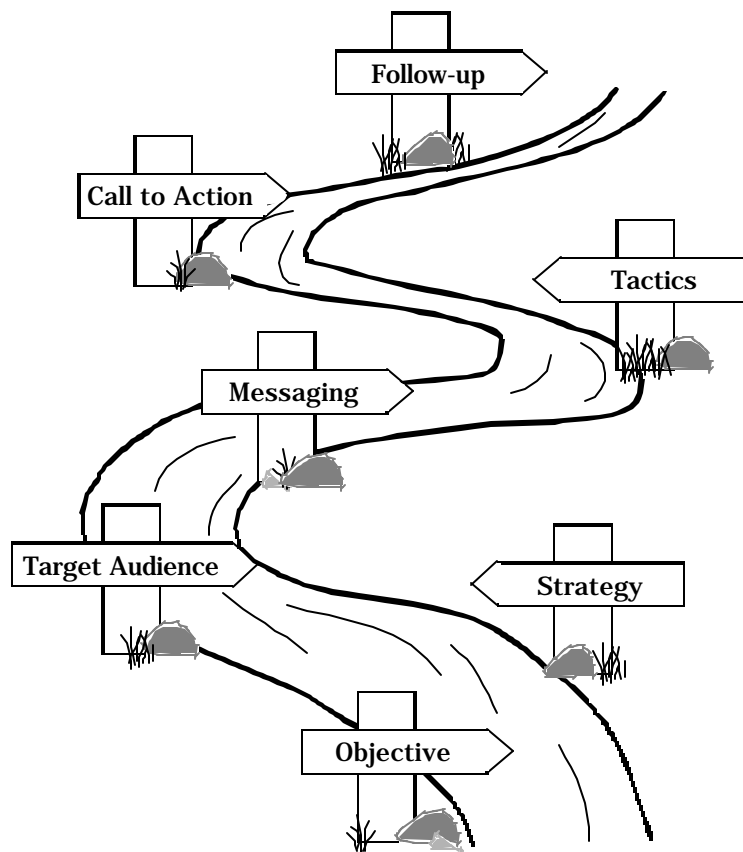




# The CCI Journal



## Executing Against Marketing Plans

By Cathi O'Sullivan

In the last issue of The CCI Journal, we defined marketing planning and discussed steps in the marketing planning process. This planning is critical, and it is the stage at which strategic thinking comes into play.

As crucial as the strategic stage of marketing is, however, the execution stage is where all of the planning is put to the test. This phase of your project will be more successful if your strategic planning is done thoroughly. Following are the key elements that comprise effective strategic marketing planning. These distinctive steps will take you from concept to plan to execution to analysis and back again. As you review the steps below, think of your marketing plan as the map used during a road trip, with cities along the route representing benchmarks and reaching the end destination the objective.

**Objective:** The objective should be measurable, should tie back to business needs, and should be achievable while still being a bit of a stretch. All other elements of marketing planning should map

back to the objective. An example of a strategic objective is: Generate \$X in gross profit through the VAR channel by the end of Q2.

**Strategy:** Define what you need to do to meet your objective. An example of a strategy that maps back to the objective above might be: Sell X number of Product X in Q2.

**Target Audience:** Find out who to communicate with to meet your strategy and your objective. An example of a target audience that maps back to both might be: Existing customers that meet the criteria for potentially purchasing Product X plus some prospects.

**Messaging:** Craft your message so your target audience will respond. An example of messaging that maps back to the strategy, objective, and the type of audience might be: Communicate to existing customers in a service-oriented tone, mentioning the benefits of moving to Product X; communicate to prospects in a professional and introductory tone.

**Tactics:** Deliver your message in such a way as to meet your objective. An example of the mix of tac-

(“Executing Against Plan,” page 2, column 3)

## What's New at CCI

By Debra Delaney

We're very pleased to announce several exciting additions to the CCI family:

**Cathy Day** started working as our Inside Sales Representative in July, and is responsible for researching, identifying and developing new business prospects for CCI. Cathy has over 30 years of sales experience from various industries including travel and computer software development & training.

**Shelley Gabbard-Earll** joined our Clients Services team in October, where she supports the day-to-day activity for several of our clients. Shelley comes to us with an extensive background in bookkeeping and client service.

**Todd Stevens** started working as a Sales Executive in November, after an impressive career that includes management and executive-level sales positions with companies like

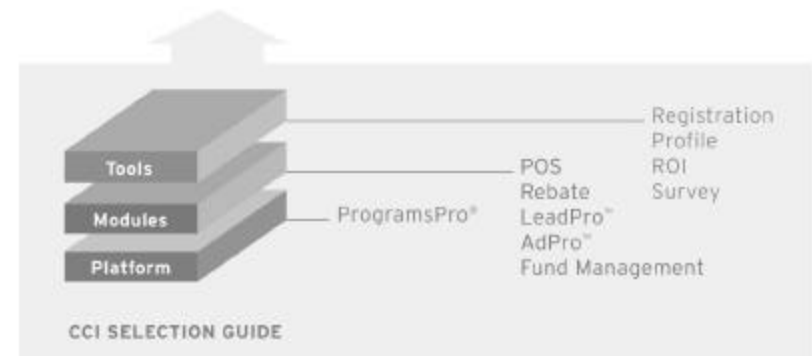
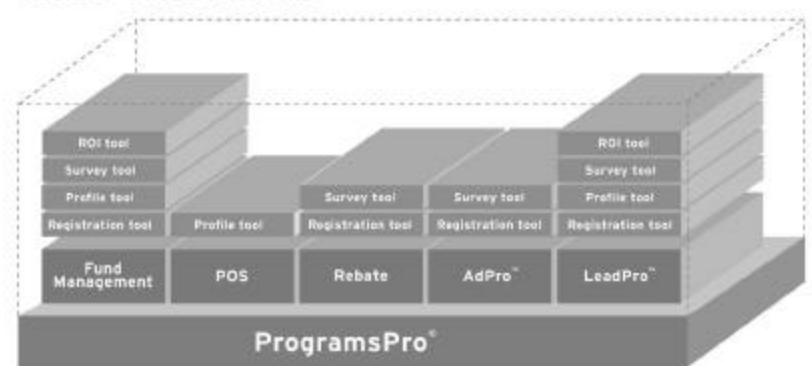
Xerox and Centura Software. Todd brings a wealth of solution-driven sales experience to the CCI team.

**Cathi O'Sullivan** is the Director of Marketing & Business Development at CCI. Cathi is responsible for directing the marketing efforts for CCI, as well as for directing the development and management of CCI partner relationships and the CCI Professional Services offering. She joined CCI in October, after almost three years as a CCI client.

One of Cathi's key initiatives over the last few months was a complete redevelopment of the CCI website. We're pleased to announce that our website is scheduled to launch in mid-January. Please visit the more robust site at [CCIonline.biz](http://CCIonline.biz).

We're also going to be offering the CCI Journal as an HTML e-mail newsletter starting next quarter. Please let us know if you would prefer to receive your copy of the Journal electronically by visiting [www.CCIonline.biz](http://www.CCIonline.biz) today. ❖

### The CCI Solution Suite



## The way I see it...



Bill Kelly is VP of Sales for CCI and helps companies define objectives, evaluate strategies and implement programs that achieve measurable results.

### ROI: Data Capture Points to Facilitate Analysis

More and more, companies are working to not only generate revenue with sales and marketing activities, but they are also trying to make the best use of every dollar spent. Most channel managers are being asked to generate higher returns with diminishing resources. In other words, determining a company's return on investment (ROI) for every activity or program is more critical than ever.

As we discussed in the "Automate Your Program and Increase ROI" article (CCI Journal, Fall 2002), there are two basic types of ROI: Operational ROI and performance ROI. Operational ROI is defined as the cost of current vs. potential reduction of costs, and performance ROI is typically defined as results (incremental revenues and profitability gained in trade programs) vs. cost of programs that provide these results.

How your company defines ROI may change from program to program or it may change every quarter, depending on your objectives and your ability to track and measure results. What does not change, in most cases, is a company's need to extract and analyze meaningful and relevant ROI data, regardless of the current objectives. But how can your company meet these ever-changing needs?

First, let us look at the various ways performance ROI data can be defined and captured throughout the lifecycle of a program. Essentially, there are five sub-levels of ROI that may be captured and they are:

**Planned** – This is the overall objective of the program or activity. The use of pre-approvals, requests for participation and quarterly planners can be leveraged to ask your customers questions related to exposure (e.g., circulation, names, attendees) and anticipated number of responses.

**Expected** – These are the results that can be reasonably

determined after the activity has been planned and paid, but before real results have been generated. Use the claiming process to progressively improve your ability to report on ROI. For example, ask how many inquiries or sales leads were received at the time of the claim request or establish automated 30 or 60-day follow-ups to see if any of the planned or expected results have changed.

**Realized** – Those results that are measurable at the response level of a program are considered realized ROI. Identify each lead with promotional codes or other tracking mechanisms that will allow you to determine which activities have generated responses.

**Actual** – This is determined when revenue can be compared to the cost of the activity or program. Tie point-of-sale (POS) or sales out information to your customers' activities. Look for correlations between products sold and products promoted. Identify how your customers are promoting specific products and tie those promotional costs back to the sale of the products.

**Verified** – This may be uncovered in various post-sale activities. Follow-up with your customers through onsite visits, sales calls and surveys.

By taking this approach to capturing marketing data you will support your company's initiatives and have everything you need to determine ROI. Then, you can analyze the data in a number of ways. For example, you can calculate ROI by dividing the sales revenue generated by the cost of the marketing activities. Then break this down by customer and product or by region and territory. By comparing ROI for each marketing activity you will be able to prioritize and select the right activities for the right markets and products. As you continue to perform this analysis you will be able to compare average ROI from year to year and develop an ongoing scorecard to judge overall program effectiveness.

CCI's ProgramsPro platform and solution modules support this process. Typical configurations include the Fund Management, LeadPro and POS modules combined with an online survey tool and professional services. If you would like to see this solution in action, please call me at 415.526.3210 or visit CCI at [www.CCIonline.biz](http://www.CCIonline.biz). ■

### Executing Against Plan

(continued from Page 1)

tics that map back to the strategy, objective, and the type of audience might be: Direct mail and e-mail, telemarketing, and a web response page.

**Call to action.** The call to action is a strong, clear, compelling offer that will guide your audience to the next step. The best call to action statements make it clear that your organization's offering is a "must have" for the audience, and it will tell them how to get it.

**Follow-up.** Regardless of the next step your audience takes, your organization should have firm follow-up plans in place so as to continue to nurture and maintain the relationship.

When you know what all the components of your marketing plan are, it's easier to execute against it and to measure success at each stage. Once you know where you're going, how you're getting there, who is going to assist you, and that you have a road map to follow, it's easier to see when and where you veer off course, allowing you to make adjustments and still reach your destination.

Executing against a marketing plan requires careful coordination and attention to detail. Regardless of the objectives and type of plan, execution requires that you develop consistent messaging delivered in a predictable manner by a team that includes all key players. Much of the work that must be done in the execution phase can be done simultaneously, but there are distinct steps to follow. These are:

#### Build the execution team

Have the right team of people working on the plan from the beginning. And, after the team is built, define each person's role, the hand-off points, and deadlines.

#### Build the infrastructure

The infrastructure to support the project can now be built or further defined. Many CCI clients use a combination of ProgramsPro, AdPro and Lead Pro as the primary infrastructure for their projects, with supporting infrastructure from other internal and external sources. Having a good infrastructure system in place early in the execution phase will ensure a flawless launch, an excellent customer experience, and the ability to collect and analyze key data.

#### Share the plan

Share your plan with other internal and external team members who will be impacted in one way or another by the project. Give them the vision for the plan, the objective, why you think they should be aware of it, and what is

expected of them, if anything. It's always better to over-communicate than to assume others know what you're doing.

#### Creative development

This is when any creative elements (direct mail pieces, templates for use by channel partners, etc.) are created and approved. This is also when any logistical elements like response mechanisms, fulfillment, postal requirements, etc., are coordinated and finalized.

#### Production

Production is complete when the final products are approved and readied for launch. Production includes everything from printing mail pieces and getting the postage ready, posting marketing templates to AdPro, and verifying that the infrastructure is ready for launch.

#### Share the plan again

Communicate, communicate, communicate. This is the time when you should give another update to both the decision makers within your organization and to your other team members, especially to channel partners who may be impacted by or who have the opportunity to participate in the project.

#### Launch

This is when the tactics of your plan "go public". Perhaps your mail piece drops, your e-mail campaign is sent, and the web and telephone response mechanisms go live. Launch time is when all of the planning, coordination, and tactical implementation come together as one.

#### Tracking & analysis

Tracking the measurable aspects of a project (as defined by your plan's objective and strategy) may be one of the most important steps in the execution phase. By tracking response, sales, or whatever metrics were pre-determined to be significant to the project, you can decide if you're getting the results you expected, how to make adjustments if the results are not what you'd hoped (or if the results are better than expected), and if and how to do the next project differently.

Remember, your marketing plan is a map that can take you wherever you want to go, if you are clear about what you want to achieve. Plot your course, choose your resources wisely, and the execution of your plan will be easier and more successful.

For more information on effective marketing planning, including Sample Marketing Plan Checklists, a generic ROI Calculator, and a PowerPoint that more fully describes the steps mentioned in this article, please visit [www.CCIonline.biz](http://www.CCIonline.biz). ■

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