

EVENT RECAP: Professional Development Program – The Marketing Plan

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We all know how it goes. We work on a proposal or another deadline, and then right on to the next one, and so on.

But are we being strategic with our time and resources? What are we getting out of our day-to-day hustle and bustle?

That's what last week's Professional Development Event on Marketing Planning helped us all ponder in-depth.

We focused on:

- 1 – Vision: What should be included in a marketing plan
- 2 – Strategy: How to implement a marketing plan
- 3 – How visions from our thoughts and experiences can translate to strategic planning and execution

As we learned and discussed, key components of a marketing plan should include quantitative and qualitative goals for the future, based on information learned from past experiences. Many people distinguish business plans and marketing plans as more distinct processes, but we discussed the approach that the following should influence a marketing plan that is constantly evolving and is well integrated with the overall business plan:

-strengths of firm and its people – understanding what works and what doesn't work

-experience and history

-go / no-go process

-staff involved and time required – for planning process, and for marketing, business development and communications efforts

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- internal communication and coordination between different departments and offices
- balance between various pursuit-specific efforts (such as proposals and lead tracking) and non-pursuit-specific efforts (such as social media, PR and events)
- types of clients and market sectors
- teaming partners
- number of pursuits and proposals
- win/loss ratio, and reasons for wins and losses
- budget: expenses and profits per effort, and totals per week, month, year and multiple years
- measurements at various intervals, such as weekly, monthly, quarterly, annually and over 5-10 years

Thanks to Lorna Lane (National Pursuits Director at HDR), Chris Pollock (Partner at Cerami) and Brooke Weinstein (Marketing Manager, Northeast at Dewberry). As the event's speakers, they provided helpful examples of how the above plan components work for their firms – and how we can all implement our own plans more effectively. Thanks also to all event attendees for an informative, lively conversation.

As attendee Kirsten Haas, Marketing Director of Acoustic Distinctions, summed up: "I was impressed by the number of attendees and their level of engagement. The range of questions posed to panelists struck me as a testament to the importance planning carries to being competitive and effective in what we do."

Want to talk more about marketing plans? Feel free to reach out: carolyn@carolynschultz.com

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