

Marketing and Sales planning process:

- 1. Current situational analysis:** Undertake a detailed evaluation of the current circumstances surrounding the client's business activities producing a snapshot of where their business is today in relation to the market and their competitors and where they would like (or could be) at a given point in the future.
 - 1.1. Evaluation of existing marketing activities:** Benchmark the current marketing activities against those of competitors, market norms and industry leaders.
 - 1.2. Market condition evaluation:** Understand the prevailing conditions in the market, (growing, shrinking or static) and make predictions for 1-5 years.
 - 1.3. Customer analysis:** Create typical customer profiles, who are they? Where are they? Why do they buy? What are their motivators/inhibitors? What purchasing cycle do they follow etc?
 - 1.4. Competitor analysis:** Identify who are the nearest competitors and market leaders then benchmark performance. Which market segments do competitors target, compare brand identities and culture, pricing and sales structures, competitive response and financial strength.
 - 1.5. PESTLE analysis:** Evaluation of macro-economic factors which influence the market, evaluate future opportunities and threats.
 - 1.6. SWOT:** Evaluate the strengths, weaknesses, opportunities and threats.
 - 1.7. Technology and systems employed:** Evaluate the technology and systems to support the sales and marketing processes.
 - 1.8. GAP analysis:** Agree where you are today and where you could realistically be in 1-5 years. Identify the potential steps needs to bridge the gap.
 - 1.9. Conclusions and assumptions:** Agree with client.
- 2. Evaluating objectives: Understand and set strategic business objectives for the marketing and sales process.**
 - 2.1. Customer segmentation:** Profile customers into groups of exhibiting similar buying behaviour.
 - 2.2. Customer targeting:** Prioritise customer segments by attractiveness and reach.
 - 2.3. Market positioning:** Determine the current market position and suggest optimal market position using a perceptual map.

- 2.4. **Competitor differentiation:** Evaluate current product and service differentiators.
 - 2.5. **Branding:** Understanding brand image, brand identity and customer brand recognition. Identify opportunities to improve the brand and for brand extension and augmentation.
 - 2.6. **Competitive advantage:** Understanding USP's and determine the customer value proposition.
 - 2.7. **Set objectives:** Set within a SMART framework.
 - 2.8. **Conclusions and assumptions:** Agree with client.
3. **Deployment of marketing tactics:** Evaluate and suggest the most appropriate marketing mix to achieve the strategic objectives of the company.
- 3.1. **Product:** What is the product or service? How is it perceived by the customer? Does it meet customer expectations and needs? Does it need to change?
 - 3.2. **Pricing structure:** What is the pricing structure? How does it compare to competitor products or services? Can you innovate with the pricing structure? Is the pricing structure appropriate to the market?
 - 3.3. **Distribution:** How is the product or service distributed to the customer? Is the distribution structure open to innovation?
 - 3.4. **People:** What are the staff skills? How are they trained? How well to they serve the customer? Do they understand (agree) with the company objectives? What is their level of product or service knowledge? What training or skills would benefit the company?
 - 3.5. **Processes:** How effective are the company processes in serving customer needs? Are the processes open to innovation? How could the processes be improved?
 - 3.6. **Physical evidence:** How does the company, product or service appear to outside world? Is this appropriate to customer expectation? How does this compare to competitors? What improvements or changes are needed?
 - 3.7. **Conclusions and assumptions:** Agree with client.

4. Marketing Communications: Setting the right mix of marketing communications tools.

- 4.1. **Key messages:** Determine the most appropriate marketing messages for the targeted market segments.
- 4.2. **Advertising:** Determine the most appropriate use of advertising.
- 4.3. **Direct marketing:** Determine the most appropriate use of direct marketing activities.
- 4.4. **Personal selling:** Determine the most appropriate use of personal selling activities.
- 4.5. **Sales promotions:** Determine the most appropriate use of sales promotion activities.
- 4.6. **E-marketing:** Determine the most appropriate use of website and e-marketing tactics.
- 4.7. **Conclusions and assumptions:** Agree with client.

5. Sales processes: Control and management of the sales process:

- 5.1. **Researching potential customers:** How to find customers? What information to collect? How to determine customer attractiveness?
- 5.2. **Creating the sales funnel:** Matching customers to segmentation profiles. Populating databases. Cleansing information.
- 5.3. **Moving from prospects to potentials:** How to approach customers? Understanding the customer sales cycle and buying behaviour.
- 5.4. **Managing enquiries:** Processes and procedures for managing sales enquiries.
- 5.5. **Negotiating with customers:** Understanding customer needs. Determining the negotiation style. Overcoming objections. Filtering time-wasters.
- 5.6. **Managing the sales pipeline:** Understanding timing and when to approach or not approach customers. Managing churn.
- 5.7. **Closing sales:** Techniques for closing sales.
- 5.8. **Managing post-sale:** After sales support and cognitive dissonance.
- 5.9. **Supporting technology and processes:**

6. Control and management: Determine appropriate resources, management responsibilities and budgets.

6.1. Resources and structure

6.2. Responsibilities

6.3. Collateral needed

6.4. Budgets

6.5. Gantt chart of activities and scheduling

7. Review and measurement: How to review and evaluate the performance for future improvement.

7.1. Measurement criteria and scheduling

7.2. Balanced scorecard structure & methodology

7.3. Milestones

7.4. Targets