

# Strategic planning

**Increase sales, at lower cost. Reduce wasted effort. Improve digital marketing content, reach and impact.**



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## Issues addressed

Plenty of commercial organisations, and many (most) FE colleges, local governments and third sector organisations don't have a clear strategic plan that details who does what and why. This template, which I developed with graduates from the Wharton Business School, and refined when I was an e-Commerce professor at the American University in Washington DC, lays out a simple formula. I use this as the basic plan format for much of my turn around and transformation work with organisations.

I use this especially to develop action plans for improving sales and marketing, particularly digital marketing.

## Recommended Solution

1. Develop the strategic policy and plan as shown below. This plan was developed in conjunction with the Wharton business school, and has been used for planning in several major organisations. The format has been endorsed by various venture capitalists as a method which enables clear understanding.
2. We suggest using an external interim to support staff with this, as this can encourage the development of internal talent, (current talent will usually feel they need help in this area) while delivering the results in the short term.

## Strategic plan model, method and contents

1. An integrated sales and marketing strategic plan is needed. This should address clearly the market segmentation, place availability and profitability of each segment and sale. In many cases, due to a lack of suitable skill sets or new competencies in the current team, they will usually require support in producing this plan. The plan should include people and costs for

developing target market segments including major accounts as well as SME accounts on the commercial side. The plan needs to focus the approach based on Return On Investment to ensure that both sales and marketing deliver value.

- a. Development of the plan should involve all other identified stakeholders.
- b. The overall strategic plan should cover the following areas, to ensure clarity and engagement with senior staff:
  - i. Mission and goal aligned with organisational strategies and goals.
  - ii. Marketplace review and summary of actions to be taken.
  - iii. Process methods; ie modified PRINCE2 for major strategic areas. This allows oversight and approval by the SMT as appropriate. I often feel that 'Prince2 lite' would be appropriate in many cases and allow oversight without slowing down the process.
  - iv. 5 strategies to deliver this
  - v. 8 tactics to support the strategies.
  - vi. 10 tactical programmes to deliver results which support the tactics and strategies.
  - vii. Measurements:
    1. Achievement against plan for each project 'product', as RAG (use Red, Amber or Green to 'traffic light') to show where each section of the plan is in terms of implementation, and develop a simple, regular report for stakeholders.
    2. People,
    3. Departments
    4. Costs
    5. Income projections and ROI.
    6. Reporting and authorisation processes.
  - viii. Risk management and mitigation, QA approach.
  - ix. RAG rating and reports process.
  - x. Corrective action planning methods and trigger points; If project product is 'Amber' status, then a corrective action plan may need to be put in place).
  - xi. Contingency plans: If a programme stream fails, then define the 'stop loss' point to cancel it. If the programme succeeds wildly, then plan on how to allocate or divert additional resources to it.
- c. The plan should be reviewed by the sales and marketing advisory board quarterly.