

Introduction

Our clients have confided in us that it can be really hard to know where to begin with developing a sales and marketing plan. They're bombarded with new technologies, shiny ideas coming from their bosses, a swirl of performance metrics, and of course, good ole self-doubt.

It's a lot of pressure, because what you plan today, you'll have to show ROI on tomorrow. You can plan for success by following these 9 steps for putting together a sales and marketing plan

Source: <https://blog.thewholebraingroup.com/9-tips-developing-201-7-sales-marketing-strategy>

1) Budget for Success

Make sure you've allocated enough resources (people and money) to accomplish your company's goals for the year. The size of your marketing budget will also depend on how much you have available to invest, and how quickly you want to see results. If you have caviar dreams and a tuna fish budget, you'll be disappointed by your lack of results, and your team will be frustrated by their inability to meet your expectations.

2) Review & Update Your Ideal Customer Profile

Look back at your best customers and identify the characteristics that make them profitable and enjoyable to work with. Make sure your ideal customer profile and buyer personas are accurate and update them as necessary to reflect the kinds of customers who will help you reach your growth goals

3) Document Your Buyer's Journey

Once your personas are updated, document the journey each persona will take toward becoming a customer. Your contacts take lots of tiny steps along the way to becoming a buyer. Plot out every interaction point your personas will have with your content or your company. This is your buyer's journey—and each persona has their own.

Start at the end—what will they do immediately before signing a contract with you? What's the step before that? The one before that? At each point along the way, identify the persona's main questions, motivations, and potential objections. Then identify the kinds of content you'll need to create to meet them at each point along the buyer's journey.

Don't forget about the influencers in the process. Feed your main contact the content they need to help educate and sell you internally.

Determine what CTAs to include in order to lead them to the next step.

4) Confirm Your Differentiators

Make sure you're clear on what makes you different from your competitors. Talk to some of your customers and find out why they chose to buy from you—and what could make them switch teams and buy from your competitors instead.

5) Review and Organize Your Marketing Collateral

Make sure that your printed and digital marketing materials are written and designed to attract your ideal customers and communicate your company's unique qualities to prospects and customers. Verify that copyright dates are updated, that your style guidelines are being followed, and that everyone on your sales team is using the right version!

6) Review Your Website and Online Marketing

Take a look at your website and social media channels to make sure they're designed to attract and educate your personas. Is your branding and messaging consistent? Are you engaging with the right target audience? Is your content compelling and educational?

7) Document & Review Your Sales Process

Is your sales process set up to close the quality and quantity of customers you need to reach your company's growth goals? Does everyone on your sales team follow the same process for qualifying and nurturing prospects? Is your process documented? Is your CRM (customer relationship management) system set up to support your process efficiently and effectively? Could you be using any automated tools to make your process more efficient? Document any issues you uncover while you're reviewing your collateral, processes, and templates. Look for "dark pools"—areas of your process where prospects or customers get lost or ignored due to lack of time/energy/resources.

8) Document Your Marketing & Sales Strategy

Prioritize the issues you've identified and develop a phased approach to tackling them over the next four quarters. Depending on the issues you've identified, you may need to develop tactical plans for content/inbound marketing, social media, lead generation, lead nurturing, or account development.



9) Track Your Progress & Evolve Your Tactics

Make sure you have defined metrics for measuring success, and have assigned individual team members to be accountable for solving each issue. Set up regular meetings to review progress, identify and solve issues, and align activities across teams. Learn from your mistakes and victories, and evolve your tactics as needed to maintain your traction!

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