Smart Insights

PLANNING TEMPLATE

A template to help you map, plan or manage your digital marketing

Edited by: Dr Dave Chaffey

Digital marketing strategy
Planning Template

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How to use this RACE Planning Template

Welcome

Thanks for downloading this Smart Insights template. We hope you find it useful in your planning to make more use of digital marketing. It's a sample of a wider selection of our advice for marketers including 7 Steps Ebooks; online training courses; how-to-videos and marketing toolkits. See the full range of content used by our Expert members.

First things, first...

Digital marketing planning is no different to any other marketing plan, in fact it's increasingly strange to have separate plans for 'digital' and 'offline' since that's not how your customers perceive your business. However, we're often required to separate plans for "digital" only based on the way teams and reporting is structured and to help the transition to digital - before it becomes "business as usual".

Some general advice to keep in mind when planning

- ☑ **Start with the customer**. Build your plan around customer insights and needs - not around your products and tactics.
- ☑ **Keep it flexible**. Situations and plans change, especially online, so ensure plans are usable by a clear vision for the year and keeping detail to a shorter term 90-day focus.
- ☑ **Set realistic goals**. Include specific objectives in your plans but keep them realistic by basing them on insights from your analytics, so they're easy for others to buy into.
- ☑ **Keep it Simple!** "Jargon light" is best. Again it helps others buy into what you're saying
- ☑ **Keep plans up-to-date**. Review and update regularly. We recommend 90-day planning.

Creating a structure for your plan

Knowing where to start is often the hardest thing when writing a digital marketing plan. So once you have a structure / framework to follow in a table of contents, it's then almost a matter of filling in the gaps...

At Smart Insights we developed the RACE™ planning system to help create actionable plans using integrated communications to engage and persuade customers based on understanding customer needs using analytics and insight. This template is based on RACE™ planning, but you also find the SOSTAC® planning tool useful - see Plan.

Creating a brief, focused digital plan

<div style="background-color:red;color:white">Strategy Recommendation 1 Create a brief, focused digital plan</div>

SOSTAC® is an awesome general planning tool, but it can lead to long plans. To make your digital plans clearer and more actionable in companies of all sizes we recommend creating a single table to communicate to colleagues.

This next single page summary format helps create integrated plans. For each part of

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RACE™ use this table to summarise the key points of your plan:

☑ **Opportunity**. Your quantifiable SMART objectives based on your analytics and market insights. State your assumptions and what informs your objectives.

☑ **Strategy**. Where you will focus your resources and investment to hit your targets.

☑ **Action**. Managing tasks to implement your strategies.

RACE activity	Opportunity	Strategies	Actions
1. **Plan.**	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐
2. **Reach.**	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐
3. **Act.**	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐
4. **Convert.**	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐
5. **Engage.**	☐ ☐ ☐	☐ ☐ ☐	☐ ☐ ☐

This inbound marketing infographic summarises activities and KPIs to use at each stage.
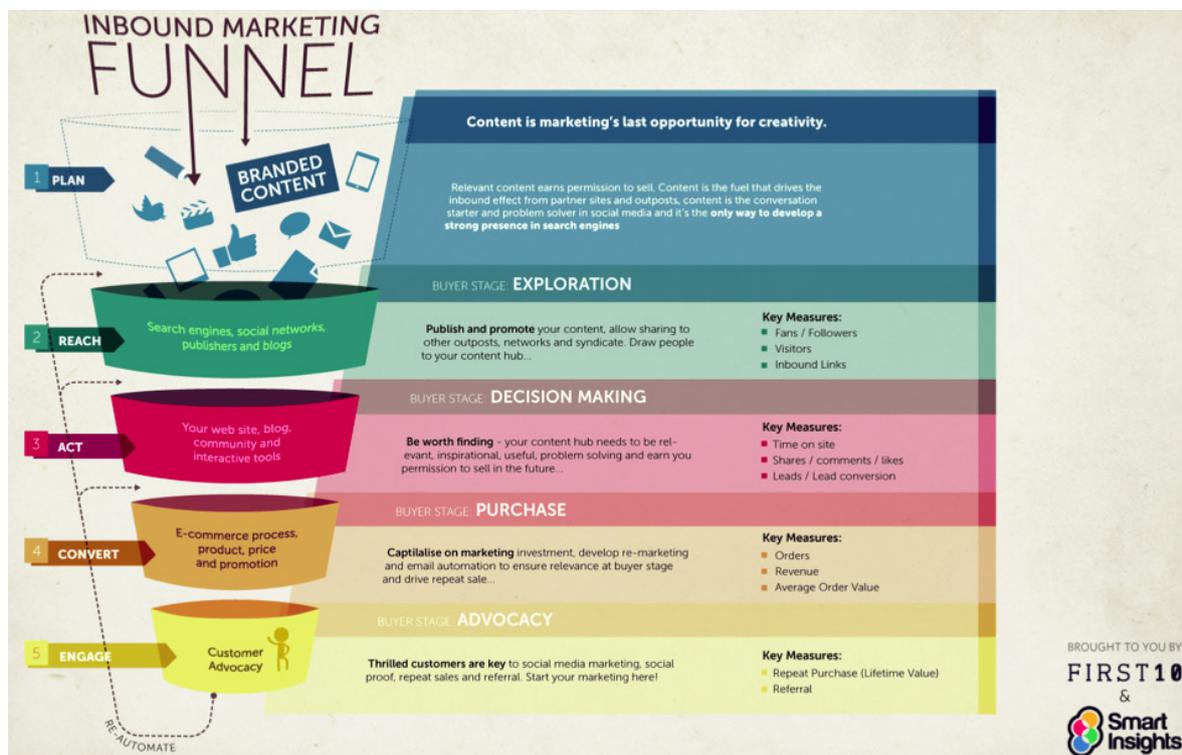
Use the interactive version at http://bit.ly/smartrace to navigate to our advice on each.

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1: PLAN
Create a digital marketing strategy

Opportunity

- ☐ Review of current performance
- ☐ Customer insight
- ☐ [Competitor benchmarking](#)
- ☐ Influencer and intermediary review
- ☐ SLEPT factor review
- ☐ Select marketing goals and create performance tracking dashboards

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Recommended resource? Digital marketing strategy toolkit templates for Expert members

Use our [Digital marketing toolkit](#) templates to prepare a customised plan for your business or your clients. The toolkit contains unbranded Word, Excel and Powerpoint templates for you to amend to help form a plan for your business or your clients' businesses.

Strategy

- ☐ Select target market segments and targeting approaches
- ☐ Define brand positioning and integration with traditional channels
- ☐ Review marketing mix

Action

- ☐ Create Reach customer acquisition plan (see next sections)
- ☐ Create Act brand interaction, content and campaign plans
- ☐ Create Convert sales optimisation plan
- ☐ Create Engagement customer loyalty plan

Using SOSTAC® planning

[PR Smith's SOSTAC®](#) [Planning System](#) gives a great framework for business or marketing plans since it's simple and logical, so it's easy to remember and to explain plans to colleagues or agencies. You can divide each part of RACE™ in a similar way, but we prefer the simplicity of Opportunity, Strategy, Action within each of the RACE planning activities.

What is it? SOSTAC®

SOSTAC® is a planning process framework to help structure and manage implementation of plans. It stands for Situation, Objectives and Strategy, Tactics, Action and Control originally developed by PR Smith for marketing communications planning. In their book *Emarketing Excellence* Dave Chaffey and Paul Smith have adapted the SOSTAC® framework to apply it to digital marketing as shown in the diagram on the next page.

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The SOSTAC® Planning System

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HOW DO WE MONITOR PERFORMANCE?

Optimising through:

5 S's , KPI's and web analytics

User experience review

Conversion rate optimisation

Frequency of reporting

Process of reporting and actions

WHERE ARE WE NOW?

Marketplace SWOT:

5 S's performance and other KPI's (& trend)

Customer insight (who, why, how?)

Market Trends

Competitor analysis

Internal capabilities and resources

WHERE DO WE WANT TO BE?

5 S's objectives:

Sell - customer acquisition and retention targets

Serve - customer satisfaction targets

Sizzle- wow factor (added value)

Speak - engaging customers

Save - quantified efficiency gains

Situation analysis — S
Objectives — O
Strategy — S
Tactics — T
Actions — A
Control — C

THE DETAILS OF TACTICS

Who does what and when:

Responsibilities and structures

Processes and systems

Internal resources and skills

External agencies

HOW EXACTLY DO WE GET THERE?

Marketing mix:

8 P's

Incl. Communications Mix

Content Plan

Contact Plan

HOW DO WE GET THERE?

STOP & SIT:

Segments
Target markets
Objectives
Positioning (OVP)

&

Sequence (Trust, Try, Buy...)
Integration (CRM & D/Base)
Tools (e.g. SEO, PPC)

Created by PR Smith, SOSTAC® is a simple yet powerful planning system, which is easily applied to help create the perfect plan. SOSTAC® is a registered trade mark with SOSTAC® eBook, workbook, webinars & workshops by PR Smith: www.PRSmith.org

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MARKETING SUCCESS

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First 10

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Smart Insights

2: REACH
Grow your audience online

Opportunity

- ☐ Define dashboard to review effectiveness of current digital media in analytics
- ☐ Review current use of digital media
- ☐ Set VQVC (volume, quality, value, cost) objectives using conversion budget models

Strategy

- ☐ Define key brand messages for audience
- ☐ Select relevant targeting approaches
- ☐ Develop content marketing approach
- ☐ Define channel integration
- ☐ Create media plan and justify media mix investment

Action

- ☐ Optimise SEO
- ☐ Optimise or review relevance of Google AdWords (paid search)
- ☐ Review opportunities from Display Advertising
- ☐ Review relevance of affiliate and partner marketing
- ☐ Social media marketing optimisation

Recommended resource? Search and social media marketing guides

We believe that search and social media marketing are the most important channels for growing your audience cost-effectively. See our detailed 7 Step Guides to these channels for a DIY approach to improving their effectiveness or reviewing with your agency/clients:

- ☑ Search Engine Optimisation (SEO) 7 Steps Guide
- ☑ Google Adwords Paid Search 7 Steps Guide
- ☑ Social media marketing 7 Steps Guide

We also have in-depth guides on marketing through all major social networks.

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3: ACT
Encourage brand interactions and leads

Opportunity

- ☐ [Review customer journeys](#) for desktop and mobile sites
- ☐ Review social media and [mobile marketing](#) platform engagement
- ☐ Define goals and dashboard for measuring and review customer interactions

Strategy

- ☐ Define customer personas (see our [Personas toolkit](#))
- ☐ Define [content marketing plan](#)
- ☐ Create plans for engaging on social media and mobile marketing platforms

Action

- ☐ Create campaign plan, [editorial calendar](#) and outreach plan
- ☐ Create content assets including [video marketing](#)
- ☐ Create [landing pages](#)

Recommended resource? Content marketing 7 Steps Guide

Use our [content marketing strategy guide](#) to define an integrated inbound plan The content marketing matrix is a great way to review current use of content marketing and identify the best types of content for your business.

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4: CONVERT
Increase sales through optimisation

Opportunity

☐ Create and review site conversion funnels and paths to purchase

☐ Review multichannel (omnichannel) interactions

☐ Review customer feedback (Tools in post: http://bit.ly/smartfeedback)

Strategy

☐ Define online conversion rate optimisation (CRO) approach

☐ Define how key online communications (search, email, social, mobile) drive sales

☐ Define offline integration paths to purchase

Action

☐ Implement site or Ecommerce sales optimistion based on analytics

☐ Implement CRO through test plan for AB and multivariate experiments

☐ Implement behavioural email programme (See Email hub page)

Recommended resource? Ecommerce Success Mapping

Our Ecommerce Success Mapping template can be used as a management tool to help you review and work on improving the key factors that drive online sales.

Recommended resource? Improving results from your website 7 Steps Guide

Our improving results from your website guide shows how to review your key customer journeys and brand messaging for quick wins to help boost conversion.

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5: ENGAGE
Build customer loyalty and advocacy

Opportunity

- ☐ Review customer loyalty using RFM analysis
- ☐ Review customer satisfaction drivers
- ☐ Review effectiveness of customer communications

Strategy

- ☐ Create customer engagement plan
- ☐ Create online personalisation and merchandising plan
- ☐ Create customer contact plan (email marketing and social media marketing)

Action

- ☐ Implement or refine personalisation rules on desktop and mobile sites
- ☐ Implement or refine event-triggered personalised emails and enewsletters
- ☐ Manage social media and email campaigns for customer engagement and advocacy

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Recommended resource? Smart Insights Email and Social Media marketing tools

Email marketing remains a core customer communication technique, especially when integrated with social media marketing. Our recommended guides and templates are:

- ☑ Email marketing 7 Steps to Success Guide
- ☑ Email marketing audit template
- ☑ Email marketing campaign templates
- ☑ Email contact strategy template
- ☑ Social media marketing 7 Steps to Success Guide
- ☑ Detailed guides to Facebook, Google+, Pinterest and Twitter marketing

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Tools to help you create and implement your plans

Benchmark your capabilities compared to your competitors

We're big fans of scoring the current digital marketing capabilities of a company, so you can show your colleagues how your different digital marketing activities rate now and how they need to be improved in future. This is a core technique for arguing for additional investment in digital marketing and for reporting on progress.

Recommended resource? Smart Insights Benchmarking Tools
We have developed a series of tools to help develop strategy and to make the case for more investment in digital marketing. These are:

- ☑ **Digital Strategy Toolkit**. Expert members can download examples and editable template as part of our which includes *Powerpoint*, *Word* and *Excel* templates to help build your marketing plan and explain to colleagues or clients.
- ☑ **Digital Marketing Healthcheck**. Score your company or clients in the 5 key areas of PRACE. This is more suited to small and medium sized companies and is available free for use by Basic members.
- ☑ **Digital marketing audit**. A more detailed spreadsheet based technique for assessing a company in 6 key areas. More suited to larger organisations or use by consultants.
- ☑ **Business case template**. Improvement needed can be justified through this template and the companion Ebook.

Take the next steps to improve your marketing skills and results

Try our free interactive digital marketing health check available to Basic and Expert members to help rate your current digital marketing capabilities and receive recommendations on how to improve results.

▶ **Upgrade to Expert membership! View the full range of Expert member resources**

All the best for your journey

Creating or refining a plan is just the beginning of the journey to making the most of digital and social media. We hope our guide has helped you on your way? Please let us know any questions you may have through our free Digital Marketing Answers Forum.

Thanks, *Dave Chaffey*, *Dan Bosomworth* and the Smart Insights team.

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