



# “Marketing Campaign Development” Book Excerpt

What marketing executives need to  
know about architecting global  
integrated marketing campaigns

**By Mike Gospe**

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## Introduction

While many of us will recognize a good, well-thought-out marketing campaign when we see one, the single, basic truth about world-class marketing campaign development is that it is easy to say, but hard to do. It is hard to do because we all like to take short-cuts. I hear the lament all too often: "I'm over-worked and don't have the time to think strategically," or "Planning is overrated. I just need to get these projects done." As a result, we take short-cuts like "Ready, fire, aim." Lack of planning is the slippery slope that leads to wasteful marketing. Then one day we get the call from the corner office to come and explain why our marketing efforts did not produce the desired results.

Luckily, developing world-class marketing campaigns is achievable for any marketing team. Successful marketing requires following a disciplined, systematic approach to working cross-functionally and cross-regionally in order to prioritize marketing objectives, design a customer-engaging go-to-market strategy, and execute the plan. This book is your guide. It will show you how to optimize your marketing efforts and achieve an even greater return on your marketing investment.

I've been there. I know. For more than 20 years I've worked the angles of campaign management. I've led a team of go-to-market strategists at Hewlett-Packard, guided a worldwide organization to tailor global strategies for regional application at Sun, and coordinated a team of corporate marketing experts to execute specific campaigns at Ariba. I've experienced the

euphoria of designing marketing campaigns that produced wildly successful response rates. And, I've earned battle scars with campaigns that were a disaster. In each case, I paid attention to noting why some worked and others didn't. Over the years I've collected and shared campaign development best practices with companies, clients, and colleagues. The result of this research is now captured in this book.

This book is not about marketing theory. It's a practical, pragmatic "how to" book designed for hi-tech marketing leaders, as well as corporate, regional, and marketing operations managers at every level. If you play a role in the development and execution of marketing campaigns, this book is for you.

This unique book takes you step-by-step through the disciplined, yet practical, process of architecting truly integrated marketing communications plans that work. In it, you will find a prescription for building a successful, repeatable campaign development process, including the necessary templates and helpful, practical techniques. The templates are also available online at: [www.kickstartall.com/campaign\\_development.html](http://www.kickstartall.com/campaign_development.html)

Good luck and good selling!



# 2

## Secrets of a Best-in-Class Campaign Development Process

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*The campaign development process is designed to drive, encourage, and optimize collaboration and teamwork across the organization. This chapter describes the basic process being used today by a number of leading high technology companies. Process flow charts, best practices, and practical tips and tricks are shared at each step in the process.*

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*"If you do your homework properly in the development of the communication strategy, it will result in a sharper, more persuasive integrated selling message directed to the most likely prospect."<sup>5</sup>*

**Don E. Schultz, Professor of Advertising and Integrated Marketing Communications, Northwestern University**

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5. Don E. Schultz, Stanley I. Tannenbaum, Robert F. Lauterborn, *Integrated Marketing Communications*, page 65-66, NTB Business Books, 1993

## What is the campaign development process, and what triggers it?

Whether your company is executing marketing activities according to a pre-defined plan or via an ad-hoc sixth sense, you are following a campaign development process. A “campaign development process” includes the steps you and your team go through to decide what marketing activity to do when and for which audience. Every company has a process, but they may not recognize it as such. What’s more, higher ROI gains are achieved when using processes that are thoughtfully constructed versus those that aren’t.

*“But do I need to follow this process for **every** marketing campaign?”* I hear you ask. The campaign development process we’re talking about is best used for only the most strategic, complex, high-stakes initiatives. By that I mean entry into a new market or aggressively stealing market share from a competitor. For campaigns that are “business as usual,” this process is overkill. Campaigns related to business basics, such as introducing a new set of features or new support options do not require as rigorous a process as described here.

After 20 years of in-the-trenches experience with a number of hi-tech companies as an employee and a consultant, I have discovered several secrets about what type of campaign development process produces consistently better results. Better quality leads, higher awareness levels, improved customer loyalty, and the highest marketing ROI are almost always achieved when marketing functional and regional experts and leaders participate in a structured campaign development process before jumping to the execution. To use another military analogy, this planning process follows the “ready, aim, fire” approach whereby military leaders decide what hill to take and plan how they will take it, prior to deploying the ground forces. The alternative is the “ready, fire, aim” approach which leads to frustration and wasted resources when campaigns have to be redesigned when the hills are re-prioritized but the ground troops have already been deployed.

***The most important benefit in embracing a campaign development process is that it invites cross-functional participation.***

By its nature, cross-functional participation avoids the problems associated with dictating marketing tactics to the team that they may not understand or agree with based on their own experiences. In the end, when there is a lack of participation in building a balanced campaign strategy, the resulting tactics appear random and unconnected. They fail to produce results or worse, confuse the market.

This chapter is broken down into three parts: an overview of the process, a summary of key roles and responsibilities amongst team members, and answers to some common questions. Here, we'll lay out the basic steps that form the best, most collaborative campaign development process.

## **Part 1: Overview of the campaign development process**

### ***From campaign kickoff to final sign-off***

A company's business planning cycle is ongoing (see Figure 1). It begins with the strategic foundation (box #1) which specifies the business goals that must be met, and when they must be met. But, it doesn't prescribe how. The "how" will be developed in the campaign development planning phase (box #2), which is the focus of this book. Once the campaign plan (or integrated marketing plan) has been established, the company moves into the execution phase (box #3). All the while, careful attention is being paid to the reporting of results and fine tuning of the programs (box #4). The final analysis then becomes an input into the next business planning cycle.



**Figure 1: A Company's Business Planning Cycle**

We will assume that a company's strategic foundation has already been established and well communicated to the marketing and sales teams. This is an important expectation because campaigns that are not well-grounded end up wasting resources, creating internal frustration, and confusing the target market.

## **How the most successful companies develop their best campaign plans**

First off, I should explain that the campaign development process is not an isolated process. In fact, it is an overlay to the annual business planning, department planning, and budgeting processes that exist in almost every company, large or small. All senior marketing executives ask their directors and department heads to submit a functional plan once a year. This functional plan includes a summary of programs or

tactics they plan on executing, along with headcount and budget requirements. Like pieces of a jigsaw puzzle, the marketing managers will produce their piece of the puzzle. Unfortunately, it is not always clear what the puzzle will look like when the pieces are put together. This is where the campaign development process comes into play. When a campaign development process is initiated, it forces the marketing functions to integrate their efforts to a much greater degree. The result is the formation of marketing functional plans that fit together cleanly to produce a crisp, clear picture.

The campaign development process is about **integration, team work, and cross-functional partnership**. In fact, the process is not worked for process' sake; it's worked to encourage the best, most insightful, most collaborative discussions so optimal marketing mix decisions are always reached (see Figure 2). This collaboration results in a 360-degree view of the marketing challenge and opportunity. Through the magic of working the process, all of the marketing media managers (e.g., press relations manager, advertising manager) come together to reinforce and drive an ongoing, meaningful dialog with a prospect or customer that will grow over time and result in a higher degree of customer loyalty.

**Why is a formal campaign development process important?**

1. It drives purposeful, cross-organization, worldwide collaboration and teamwork.
2. It establishes a consistent, systematic approach for synchronizing multiple (and possibly competing) campaigns.
3. It speeds time-to-production and lowers the development costs of all marketing materials because costly rewrites are avoided.

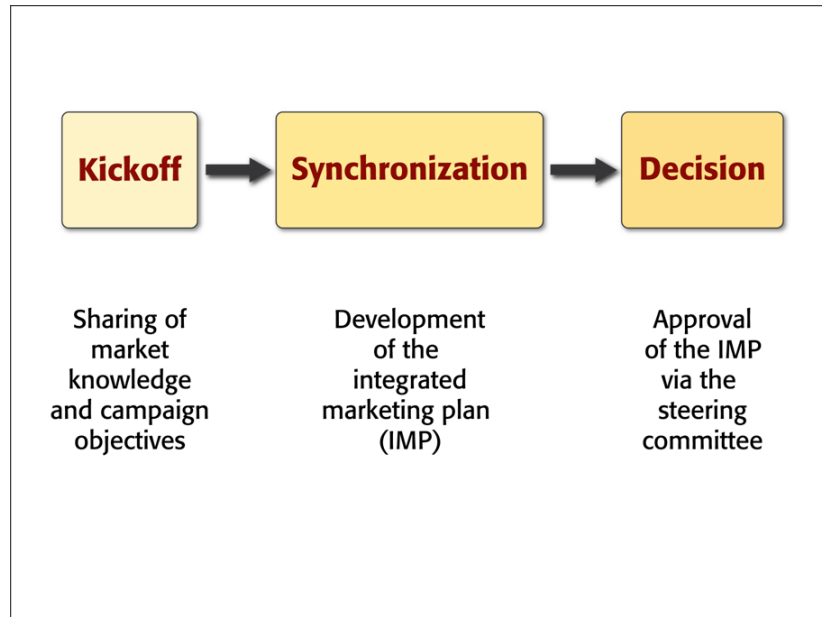
***Figure 2: Campaign Development Process***

When a consistent, systematic process is not followed, team members remain siloed. They spend a lot of time debating priorities, strategies, and time tables. Frustration levels rise because decisions are second-guessed. And, the creation of marketing deliverables from press releases to website and collateral design take multiple iterations that would have been unneeded if a stable strategy and direction had been agreed to and communicated widely before production began.

## **Breaking down the basic campaign development process**

Although each company will have a slightly different campaign development process, there are three primary stages that all processes have in common: Kickoff, Synchronization, and Decision (see Figure 3).

Kickoff meetings literally mark the beginning of the collaborative campaign development process. Synchronization meetings are tools used to help the team develop the IMP and address gaps, issues, and road blocks. Because resources are limited and business priorities must be established, a campaign management steering committee is required to provide the proper guidance. This steering committee is designed and run similarly to the product development steering committee. It is an executive body responsible for approving integrated marketing plans for the most strategic campaigns. It is also a point of escalation for resource and budget issues.



***Figure 3: Three Phases of the Campaign Development Process***

Marketing campaigns don't build themselves. And, they are not built by a single person. However, they are driven by an anointed campaign manager who has the responsibility and authority for bringing people together to tackle the marketing opportunity. It is critical to understand that while led by a campaign manager, the campaign strategy and tactical plan will be developed by a team via this collaborative process. The designated campaign manager may reside in product marketing, corporate marketing or field marketing. The role of the campaign manager is further explored in Chapter 7.

## The Kickoff Meeting: prelude to planning

**Purpose:** *To educate, inform, and align the marketing team*

**Meeting host:** Campaign manager

**Participants:** A representative from each corporate marketing discipline, product marketing, field or regional marketing and sales

**Agenda:** To introduce the campaign and walk through the primary data and background that is required in order for the functions/regions to develop specific programs to support the campaign.

**Meeting design:** Lecture and Q&A

**Meeting length:** 1-2 hours

The campaign development process officially starts with a public kickoff meeting led by the designated campaign manager. However, before the kickoff meeting is held, some careful preparation is required. In most cases, the CMO or VP of marketing will have named and introduced the marketing campaign concept (sometimes referred to as initiatives) for the fiscal year and then anointed a campaign manager to lead each campaign.

The campaign manager's first duty is to research the opportunity, gather key market and competitive information, and then work with the executive team to confirm the specific goals, objectives, general resource requirements (including rough budget guidelines), and timing of the campaign. This information becomes the solid foundation upon which the campaign details will be built. To be sure, the campaign manager does not do this in isolation. The best campaign managers are politically-savvy marketing leaders; they will interview stakeholders and experts inside and outside the company in order to scope the campaign appropriately. With this information in hand, the campaign manager is ready to introduce the full campaign scope to the rest of the global marketing team. This takes place during the kickoff meeting.



It is important to understand that the kickoff meeting is not about dictating or even brainstorming the marketing tactics (That happens later.) Instead, the kickoff meeting is a prelude to planning. The campaign manager uses this meeting to educate, inform, and direct a larger team of marketing experts who will be called upon to execute the campaign. The campaign manager will also describe the process they will follow during the coming weeks. (See Chapters 4 and 5 for more detail.)

One of the best examples of a kickoff meeting was at Sun where the campaign manager hosted a structured meeting in a style similar to a press briefing. His agenda was clear and concise; he included guest speakers from product marketing to describe the target audience, and a speaker from analyst relations to update the team on a recent analyst report relevant to the industry. There was also plenty of time for questions and answers. During this meeting, he distributed a color-coded, bound set of reference materials that gave further details on the campaign objectives, target audience segmentation, product value proposition, customer references, relevant benchmark statistics, testimonials, and evidence to support their claims of product performance. In short, by the time the meeting concluded, all representatives of his extended team had 80% of the information they would need in order to draft a recommendation for how their function could support the overall campaign. The final 20% would be worked out as team members collaborated in the following weeks. An example of a typical agenda for a kickoff meeting is shown in Figure 4.

### **The best time to hold a kickoff meeting**

Kickoff meetings are usually either tied to the annual planning process or to a specific product launch plan. A typical campaign development process can take between eight and 12 weeks, depending on the complexity of the campaign. Ideally, from a timing standpoint, a typical kickoff meeting is held four to six months prior to the launch/execution date. This allows plenty of time for the team to work the details of the activities and offers once the strategy has been set. (As you will recall with the WebTone example in Chapter 2, the planning-to-first-execution timeline was 90 days: the kickoff meeting was held on January 2, with the first tactical launch executed on April 15.)

### **Integrated Marketing Plan – Kickoff Meeting Agenda**

#### Welcome and description of the marketing campaign (15 minutes)

- Introduction of the campaign name including a short description
- High-level marketing goals (upon which the success of the campaign will be judged)
- Time table indicating the duration of the campaign and the targeted launch date

#### Setting the stage (60 minutes)

- Market backgrounder
  - Target market segmentation, including the business problem the target audiences are trying to solve
  - Current (or near future) competitive alternatives
  - Partner or channel implications
  - Q&A
- Relevant product information
  - Product value proposition (as relevant to the intended target audience)
  - Product launch plan (if this is for a new product introduction)
  - Product roadmap (if multiple releases are going to be introduced during the campaign's time frame)
  - Q&A

#### Next steps (15 minutes)

- Action items for team members
- Where to get additional information
- Campaign development timeline
- Q&A

***Figure 4: A Typical Agenda for a Kickoff Meeting***

In reality, the team may not have the luxury of this much time. In that case, it is best to host a kickoff meeting as soon as possible after the executive direction has been communicated. But, keep in mind that a well-run kickoff meeting is not just thrown together. It is important that the campaign manager be well prepared to share this information in a coordinated, confident manner. Because businesses are moving quickly, the market analysis may not yet be complete in time for the kickoff meeting. However, there must be a reasonable amount of confidence in the available data and executive sponsorship in order for the campaign to be kicked off.

### **Who attends the kickoff meeting?**

In general, the kickoff meeting is open to anyone who has a need or an interest in the campaign. Since the objective is to educate, inform, and guide, the more widely this information is shared, the better.

Required attendees usually include:

- Product marketing representative(s)
- Partner and channel marketing representative(s)
- Corporate marketing functional representatives from
  - Advertising
  - Press relations
  - Analyst relations
  - Direct marketing
  - Event marketing
  - Collateral
  - Web marketing
- Regional marketing representatives
  - Americas
  - Europe, Middle East, Africa (EMEA)
  - Asia Pacific
  - Japan
- Sales representative or sponsor

Optional attendees may include executives, managers, and individual contributors throughout the organization including customer support, inside sales, and product management.

**Tips & Tricks for avoiding the three most common kickoff meeting disasters:**

- 1. Failing to hold a kickoff meeting:** When campaign managers decide they don't need one, they fail to engage the team that will be responsible for executing the marketing tactics. As such, the individuals never develop a common frame of reference, nor do they feel that they are part a larger team with a common goal. This lack-of-connection encourages siloed behavior and the development of discrete marketing tactics that are not integrated. It also encourages regions to (continue to) act independently from headquarters.
- 2. Dictating the details of the marketing plan:** Sometimes campaign managers go too far and prescribe specific marketing tactics at this meeting. The meeting and their role then become political because this approach implies the campaign manager has direct authority over the team, which is not usually true. Thus, it causes all kinds of frustration and angst within the team.  
  
A good campaign manager will likely have some rich insight and knowledge about the market, region, or the marketing activities which will apply best. But, an experienced campaign manager will know that campaigns for large, multinational companies are complex by nature and must have cross-functional cooperation in order to develop and then execute a balanced campaign. He or she will invite the appropriate individuals to participate in the planning process, thereby gaining their wisdom, knowledge, and most importantly their commitment to execute the plan with their full energy and a positive attitude.
- 3. Failure to describe the process:** Whether or not this is the first time the team has gone through the campaign development process, the campaign manager must always end their meeting with a clear roadmap of next steps so the team members know what is expected of them. Milestones, due dates, and timetables must be clearly communicated. If team members leave the meeting unclear on what they need to do next, the meeting has failed.

## Synchronization Meetings: building the IMP

**Purpose:** *To develop a working draft of the Integrated Marketing Plan*

**Meeting facilitator:** Campaign manager

**Participants:** A representative from each corporate marketing discipline, product marketing, field or regional marketing and sales.

**Agenda:** For the marketing media experts to share program recommendations, identify gaps, and gather feedback on where/how their function can support the achievement of the campaign objective.

**Meeting design:** Collaborative working sessions conducted over several weeks.

**Meeting length:** 4 – 8 hours each, depending on the agenda

### What are synchronization meetings?

Having conducted the kickoff meeting, the team is now grounded in a common understanding of the marketing opportunity and the campaign-level goals. With that as background, the focus of the next eight–twelve weeks will be on developing an IMP.

A synchronization meeting is a structured brainstorming, collaborative session where the team comes together to get real work done in constructing the IMP. An IMP template is provided so team members can collect their thoughts and share recommendations (e.g., functional goals, objectives, metrics, programs and activities). As each member presents their material, the others ask questions, helping to identify gaps and overlaps and ultimately construct a comprehensive campaign.

Throughout this process, there will be a series of synchronization meetings, some formal, some informal. Whereas formal synchronization meetings are structured as ½ day or day-long practical working sessions, informal synchronizations may take place daily between individuals. There is no question that some of the most insightful recommendations and creative ideas will be generated in these collaborative sessions. Depending on the complexity of the campaign, more or fewer of these synchronization meetings will be required.

Each formal synchronization meeting will be moderated by the campaign manager. Participants include functional and regional representatives. The objectives of the synchronization meeting series include:

- To develop the first or subsequent draft of the IMP
- To hear functional/regional recommendations and build a comprehensive view of the total campaign and the supporting programs (at a high level)
- To look for gaps, potential synergies with other campaigns, as well as risks and dependencies
- To discuss and debate implications and areas for further refinement
- To get a rough idea of resource and budget requirements

#### **Four types of synchronization meetings**

Depending on the complexity of the campaign or the extent of the global reach of the campaign, multiple synchronization meetings may be required. There are four types of synchronization meetings; some of these may be combined.

***By synchronizing the media, you are deploying a cohesive sustained dialog rather than the fragmented scattershot of messages often experienced by customers or prospects.***

### **Synchronization Meeting #1: Architecting the campaign map**

This is the first synchronization meeting and usually takes place one week after the kickoff meeting. The focus of this meeting is on the strategy and programs (not the tactics) that support the campaign. The goal is to produce a campaign map – literally a mapping of the set of agreed-upon programs that will comprise the overall campaign. (Recall the WebTone campaign map shown in Figure 1.) Chapter 4 explores the concept and purpose of the campaign map. The goal of synchronization meeting #1 is to rally the team in support of which, and how many, of these programs are necessary to achieve the campaign's objective.

### **Synchronization Meeting #2: Aligning multiple campaigns**

Synchronization meeting #2 is a reality check. When companies are running multiple campaigns, it makes sense to synchronize the campaigns to understand where they overlap. Overlaps can commonly occur with common target audiences, products, vehicles, and timeframes. For example, one company was running five campaigns thought to be unique. However, as the campaign maps for each were developed, they discovered that three of the campaigns were targeting the same audiences (CIOs of Fortune 500 companies) at the same time (April) with some of the same products. By discovering this overlap, they decided to combine two of the three campaigns, and to shift the third campaign for execution later in the year.

With the campaign map now illustrated, an executive summary of the campaign strategy is produced and then shared with the steering committee at the Gate 1 review meeting. Once approved, the team is ready to prescribe the supporting activities and offers that will make up each supporting program. Those will be generated during the synchronization #3 meeting.

### **Synchronization Meeting #3: Developing program blueprints**

Synchronization meeting #3 is about diving into the specific activities and offers that make up each of the recommended programs. As such, each program will have a blueprint that shows how the combination of media types is used to create a personalized, engaging dialog with the intended audience. Chapter 5 introduces the blueprint concept and

details the seven basic program blueprint types. The campaign team will work from these models to determine which ones apply and then customize them to meet their specific market needs.

It is important to understand that we are still in the planning stage – not the execution stage. This means that we want to map out a path for engaging a specific target audience so as to communicate a specific message or message theme. This is not about tactical planning where we list out every action item for every email that will be deployed during the course of the program. Those tactics will be captured, managed, and monitored during the execution phase of the campaign; but that level of detail is not appropriate during the planning process.

#### **Synchronization Meeting #4: Aligning regional activities**

Synchronization meeting #4 is also a reality check. When multiple campaigns are intended to be introduced within a region at the same time, the execution of those activities may be constrained by the limited regional resources. To help avoid miss-set expectations and disappointment, a separate synchronization meeting may be needed for regional managers to prioritize the multiple campaigns and their supporting programs. Conducting this synchronization meeting early can help teams avoid producing blueprints that will never be acted upon in the regions.

#### **Three secrets for managing successful synchronization meetings**

Synchronization meetings can be wildly successful or downright painful. What makes the difference? The secrets to success are the following:

- 1. Structured meetings:** The campaign manager provides structure to the work session. This means that the campaign manager will act as a moderator and will develop a crisp agenda with a clearly-stated meeting objective. The campaign manager ensures that all participants have a chance to contribute and be heard. They are also in charge of taking notes and capturing action items.



2. **Active participation:** Team members are active participants in the meeting, assisting the campaign manager at each stage of the campaign development process. All participants come prepared to share their insights and recommendations, having completed any assigned pre-work.
3. **Professional engagement:** Only constructive dialog is allowed. Ground rules are set and reinforced to encourage open and honest discussion that is respectful of all team members.

## Decision: steering committee review meetings

**Purpose:** *To gain approval of the IMP at Gate 1 and Gate 2*

**Meeting host:** Chairman of the steering committee, usually the VP of marketing operations

**Participants:** Steering committee members

**Guests:** The campaign manager and selected team members who will participate in the presentation

**Meeting design:** Presentation and Q&A

**Meeting length:** Typically 60 minutes per team presentation

For large multinational companies, marketing campaigns can be complex and detailed. This is especially tricky when multiple campaigns may be initiated at the same time with overlapping objectives. When resources are limited, business priorities must be established. A campaign management steering committee is required to provide the proper guidance. As mentioned earlier, the steering committee is an executive body responsible for approving integrated marketing plans for the most strategic campaigns. It is also a point of escalation for resource and budget issues.

The steering committee review is not to be taken lightly. The campaign team must be fully prepared to present their campaign strategy for Gate 1 review and then the program details for Gate 2 review. They must have their facts straight and be prepared to describe and even defend their recommendations.

**Campaign management steering committee, defined:**

- Comprised of VPs of marketing operations, product marketing, marketing communications, field marketing, regional marketing
- Focuses on strategic topics related to marketing messaging, communications, and customer engagement models and methodologies
- Makes operational decisions regarding campaign development, prioritization, regional considerations, and resource allocations (budget and headcount)
- Reviews and approves (or disapproves) the IMP at two phases:
  - Gate 1: approval of the campaign strategy, including the campaign map
  - Gate 2: approval of the program blueprints that include the recommended activities and offers

**Why are there two steering committee reviews?**

The objective of the Gate 1 review is to set forth the campaign strategy, including the resource requirements, necessary for success before work actually begins on the tactics. Countless hours and dollars have been lost in marketing activities being developed that later got cancelled or flat out missed their mark. Gate 1 is intended to help guide and reinforce team decisions so these precious resources are not wasted. (See Figure 5 for an example of a typical Gate 1 agenda.) Only once Gate 1 has been reached and approved, will the teams be allowed to focus on the specific activities and offers that will comprise the overall campaign.

**Integrated Marketing Plan – Campaign Strategy Review  
Agenda – Gate 1**

- Campaign name & description
- Campaign objective(s)
- Value proposition
- Campaign map
- Tactical calendar (program view only)
- Rough budget estimate
- Key assumptions
- Synergies with other campaigns
- Open issues requiring steering committee guidance

***Figure 5: A Typical Agenda for a Gate 1 Review Meeting***

The objective of the Gate 2 review is to roll up all of the program blueprints (and their activities and offers) to evaluate how they all fit together. A sample of a Gate 2 agenda is shown in Figure 6.

**Integrated Marketing Plan – Program Blueprints Review  
Agenda Gate 2**

- Summary of revisions from Gate 1 meeting
- Overview of key program blueprints
- Program Executive Summaries
  - Program name, description, and objectives
  - Program blueprints (showing the connections between activities and offers)
  - Program calendar of major events
- Synergies with other campaigns and/or programs
- Open issues requiring steering committee guidance

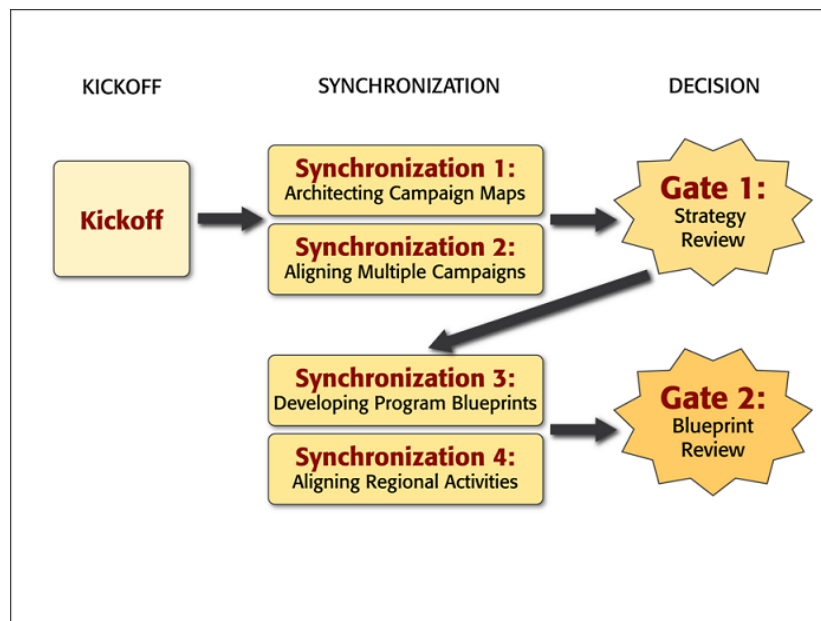
***Figure 6: A Typical Agenda for a Gate 2 Review Meeting***

During this review session, campaign teams can and should highlight gaps and overlaps and risks associated with being able to successfully deploy the campaign. Occasionally, campaigns will overlap and teams will be fighting for limited resources. In this forum, the steering committee can address those issues, make real-time decisions, and provide final guidance to the team as they prepare to execute the tactics of the campaign.

In addition to these two formal meetings, the steering committee is a resource to help resolve escalations. When issues arise due to changing market dynamics, product road maps, launch plans, etc, the campaign manager may decide to engage the steering committee to get guidance and resolve issues earlier rather than later.

### Putting it all together

Figure 7 shows the general process steps from the kickoff meeting to the final steering committee review meeting.



**Figure 7: Fundamental Steps in the Complete Campaign Development Process**

Despite these formal steps, much work gets accomplished during informal and impromptu meetings which I term “mini-syncs.” These hallway conversations and small group sessions can be incredibly productive. I’ve observed that cultures that encourage delegation and personal initiative produce the best plans quickly. It is important to note that every company will have nuances about this process that will be unique for their organization. However, the basic process steps will be very similar.

## Part 2: Roles and responsibilities

I am commonly asked to describe the roles and responsibilities of players involved in this process. Although each company has its own uniqueness, Figure 8 provides some typical definitions and descriptions that will help you set some team, and individual expectations.

| Department                           | Responsibilities  |
|--------------------------------------|---|
| Campaign Management                  | Responsible for team coordination and managing the development of the IMP. Owner of the IMP process and author of the final IMP document.   |
| Corporate Marketing                  | Responsible for designing and executing the marketing media strategies and tactics (e.g. press releases, global lead generation programs, webinars, website, events, advertising).  |
| Field Marketing                      | Responsible for lead qualification and development of viable sales opportunities; supplements corporate marketing plan with local activities & offers (with an effort to leverage corporate marketing resources & materials). |
| Marketing Executive                  | Responsible for sponsoring the overall campaign; ensures alignment with company goals; removes roadblocks.  |
| Partner Marketing                    | Responsible for representing partner needs in the campaign development process; acts as the interface and liaison between corporate marketing and the partners.   |
| Product Marketing (outbound-focused) | Responsible for product strategy, target market segmentation, messaging, and content creation.  |
| Sales Representative                 | Represents sales priorities and objectives; provides input into the campaign development process; also communicates campaign status to the rest of the sales team.  |
| Steering Committee                   | Responsible for approving and prioritizing the campaign plans and resolving escalated issues that impact the successful execution of the campaign.  |

**Figure 8: Basic Roles and Responsibilities**

## **Part 3: Answers to the four most common questions about the process**

### **Who is responsible for the campaign development process?**

In most cases, a technology company will have a VP or senior director of marketing operations responsible for constructing the umbrella campaign development process. This person (or team) will also be responsible for producing the tools and templates, as well as training the rest of the organization in how to engage the process. The campaign managers may or may not report to the operations staff. Regardless, they will be working together closely to adopt and adapt the process in real time.

### **When do you need a campaign manager?**

Not all companies may need a formal campaign manager role. Smaller businesses that sell only a few products to a few audiences may indeed be able to manage the complexities of their campaigns within the structure of their current marketing team. However, if yours is a company with annual revenue of more than \$50M, markets in more than one geographic region, and a marketing budget of any amount, you can benefit greatly by making use of a campaign manager. Other factors include your specific campaign or product launch objectives, the breadth of your product offerings, or the number of targeted market segments you want to actively pursue. The more strategic or critical your marketing objectives, the more value a campaign manager can bring.

There is always a cost inflicted by a lack of strategic forethought and coordination. Although that cost may be intangible to upper management, it is nevertheless very real. Once a company reaches this size and complexity, it is guaranteed that some marketing dollars will be wasted and opportunities will be missed without the guidance and marketing discipline a professional campaign manager can bring.

**Is the IMP meant to be a tactical marketing plan?**

No. Remember, the IMP is not a tactical marketing plan. It is not intended to be the Gantt chart of all tactics and all action items. There are other tools better used for that once you pass Gate 2 and then get into the execution phase (which is outside the scope of the IMP). Instead, the IMP links activities and offers to programs and campaigns. Chapter 5 describes the level of detail appropriate in planning blueprints. For now, don't get caught in the weeds.

**How often do these campaigns get updated?**

After an IMP has been approved at Gate 2, you're now in execution mode. It's tempting to think that planning is now complete. But it's not. The world continues to evolve and your business conditions will change too. Therefore, it is best to review the IMP once each quarter, and plan a formal review with the steering committee every six months. That way, you have the ability to make changes proactively. The campaign manager's job is to keep an eye on the campaign and how the market is responding to it. He or she will track campaign results and report back to the steering committee during quarterly or semi-annual checkpoint meetings.





## About the Author



Mike Gospe is a co-founder and principal of KickStart Alliance ([www.kickstartall.com](http://www.kickstartall.com)), a marketing and sales SWAT team that assists businesses of all sizes in architecting and executing a variety of marketing and sales programs and plans. With more than 20 years of hi-tech marketing experience, Mike is an accomplished leader, marketing strategist and corporate executive, working with marketing leaders to architect and hone their strategies, processes, and plans.

Mike wears the victories and battles scars of campaign development, having worked eight years in the trenches as a campaign manager and then as the director of the campaign management team at both HP and Sun. As a result, Mike was recognized as being one of the key architects that helped these companies reinvent their approach to global integrated marketing planning and execution.

As a recognized leader, Mike has authored a number of marketing and sales-related articles, and is a frequent guest speaker at venture capitalist and marketing forums on the topics of business and marketing planning, messaging, and sales development. He has a BSEE and an MBA from the University of Santa Clara. Mike and his family live in Los Altos, California.

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