

CASE STUDY

Mastering the Digital Marketing Plan

Professional Mastery Series

**Step-by-step guide with expert advice
and techniques for briefing an integrated
marketing communications campaign,
with Ogilvy's Mark Sareff.**





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Read this first

This template is for a digital marketing strategy – an ongoing business activity rather than a one-off campaign. It’s useful for briefing a digital agency as well as a tool for articulating a digital strategy for internal use.

Q: When it comes to filling in a digital campaign brief/template, what are the important sections that you would place special emphasis on?

Steve Hallam: If you are providing a digital agency with a brief, then I think it’s important to focus on the first few sections of this template, in particular, the sections about your objectives, the marketing environment, and your strategies. You should also be upfront about your budget.

It is perfectly fine to leave the tactics part for the agency to fill out in their response, or, if you wish, to provide some suggestions.

This is definitely a case of the more information the better – if you can give your agency detailed information about what you’re trying to achieve and what you think might be a good idea, then that is great – but you also want to provide freedom for your agency to innovate too. Your agency will probably think of strategies and tactics that you as the procurer might not.

Be fluid in your thinking. Be open to accepting new ideas and new direction that you may not even have considered. That’s what you hire an agency for in the first place!

Q: Everything is measurable in the digital landscape; so, how important are specifics in terms of objectives, or desired results?

SH: This template below is good in that it asks for a lot of objectives-based information. It is always terrific if a client is able to provide specific outputs that are desired, for example, the number of likes, shares, or page-views, ecommerce leads, or so on.

At the same time, we also want to know what your desired outcomes are. For example, a desired outcome could be ‘wanting to be well known in your market segment’, and have ‘first of mind recall for a particular type of product’.

Go through the S.M.A.R.T. (Specific, Measurable, Assignable, Realistic, Time-related) framework. That’s a pretty good guideline for creating objectives. Additionally, you should ensure that your campaign analytics, such as tagging and tracking, is robustly designed so everything can be measured and attributed accurately. Ideally this would include an overlay of omni-channel tracking and attribution so you can see the impact across all of your channels.

Q: How does a marketer ensure that a digital strategy remains in line with the wider umbrella of marketing objectives in the company?

SH: When completing this template, you may notice that information is asked for in a logical order, where each section provides information that links to the next section.

For example, if we've set up strategies that will allow us to hit our objectives, and we've set up tactics to allow us to hit our strategies, then all we really need to focus on is doing all the tactics and putting together a plan, and by default we should hit our objectives.

The heart of any good strategy is the linkage between objectives, strategies and tactics.

Bear in mind that there has to be consistency across your various digital channels, and that your objectives and strategies should align with your overall marketing plan.

Q: Who should be involved in the completing of this template?

SH: Depending on the size of your organisation, in the ideal situation, a digital campaign manager should be in charge of this, with input and/or review from the overall marketing team. There could also be involvement from the content and engagement team/s, if they exist in your organisation. Otherwise, this is where your agency will come in.

You may also want to involve your CMO and/or the C-suite as well. I would sit down with them to set and/or review the objectives, and have them help you align your digital marketing objectives with the overall business & marketing objectives.

Q: What are some of the most common mistakes you see in digital briefing from clients?

SH: First, you should give consideration to the different types of media as part of your campaign – bought, owned and earned. If you focus exclusively on bought media, then you're likely missing the impact that your own site/s can have and how you might earn media mentions from others. Earned media is quite often the most difficult to achieve but often resonates the most with customers

Second, you should baseline your current position so you have an understanding and measurement of your current marketing performance prior to commencing a campaign. This will also mean that any uplift that can't be directly attributed to the campaign can also be recognized.

Third, the Campaign Measurement (Test and Learn) section is really important. A lot of people tend to set and then forget. Markets crash and unexpected things happen. Strict campaign monitoring means you remain agile and can redirect investments if performance isn't measuring up. It's also incredibly important to build up a database of previous campaigns, with analysis on what has worked and what hasn't. This way, not only do you prevent past mistakes from happening, you can also incrementally improve on your previous learnings. It will also assist you with insights on customer journeys and this will in turn help you and your agency plan out what an 'ideal' customer journey might look like, and where & how to engage with the customer.

Finally, another major mistake I think some organisations make is that they think of marketing campaigns as a project rather than an ongoing business activity. Of course, certain times of the year, say Christmas, you do specific campaigns, but even then, it needs to be continual and speak back to your overall marketing plan. A digital campaign should not be just once-off project – it has to talk to the past and the future.

Part 1: Campaign Objectives

1.1 General aims for campaign

- General marketing aim of campaign and context
- Product categories or services targeted.
- Sales and lead generation goals.
- Positioning and brand communication goals.

1.2 Goals

What do you hope to achieve from this campaign? Provide detailed goals if possible, for instance:

- Reach (number of prospects reached on third party sites).
- Incremental unique visitors or visits to site.
- Incremental social engagement (target number of 'Likes' on Facebook, Twitter followers or email signups).
- Marketing outcomes and conversion rates.
- Campaign response – leads or sales percentage.
- Email sign-up percentage.
- Where to buy and where to be seen.

1.3 Branding objectives

- Brand awareness – how will the campaign increase brand awareness?
- Brand familiarity – which products are featured in campaign, what is the emphasis?
- Brand purchase intent goals – how is the campaign intended to directly and indirectly influence sales?

1.4 Measurement

What will be implemented to measure success?

1.5 Budget

Be upfront about how much money has been budgeted for this campaign.

Part 2: Market & Environment Analysis

2.1 Target audience

Target audience segmentation and personas:

- Demographics (Age, gender, social groups, or B2B demographics – members of buying unit, company size and sector, etcera).
- Psychographics (interests, attitudes, opinions).

2.2 Audience motivations (scenarios)

- Typical customer motivation and/or scenarios for responding.
- Customer journeys.
- Who are the key influencers?

2.3 Competitors

- List direct competitors and their core value propositions.
- Indirect competitors.
- Any possible category imitations.

2.4 Intermediaries

Different types of digital channels that you could use to increase audience reach:

- Horizontal portals and mainstream media.
- Niche or vertical industry sector media sites.
- Niche social networks.
- Aggregators and super affiliates.
- Small affiliates and blogs.

2.5 Media consumptions and buying process

- Which media sites or portals do your customers typically use, how web savvy are they?
- What is the process by which they select products (search key phrase sequence)?
- Who do they trust? Why?
- How does a brand gain their respect and attention?

Part 3: Campaign Strategy

3.1 Strategies for each objective

How will you address the audience with the offer, message and positioning that you have created? Use any research/insight from section two. Think about:

- Is your audience online? Is digital the lead or support to traditional offline broadcast media?
- Are there times of the day when your audience is most likely to be receptive? Timing is everything.
- Are you looking to interrupt with advertising or build relationships?
- How can you add value so that the audience is motivated (directly or indirectly) to spread your message for you?
- Do you want to create excitement with prizes and give-aways or maybe you need to incentivise transactions?

3.2 Strategies for each form of media

- How will you use each of the three types of digital media?
- Owned: what do you already own and how can you use that to your full advantage?
- Earned: blogs, social media, partner sites – how to engage and generate interest?
- Bought: where will you advertise for best impact?

3.3 Ideal customer journey path

Append a customer journey map.

Part 4: Tactics

4.1 Campaign concept

The hook, theme or main message you want the audience to recall and act upon.

4.2 Value proposition

- Outline the benefits to the customer and the corresponding features that deliver these benefits.
- How does the value proposition differ per channel and which channel is preferable and why?
- Why would someone take up an offer and what would make them not?

4.3 Ideas for main creative concept

What attracts attention and proves relevance to potential customer?

4.4 Owned media

- How will you produce content that is suitable and attractive?
- Optional: insert or append a content strategy document – can any existing content be used?

4.5 Earned media

- Part of your campaign might be reaching advocates:
- How do you attract key influencers?
- What will they like?
- How do you reward them?

4.6 Credibility

How do you prove what you say is valid?

4.7 Key brand messages

Not all prospects will be familiar with your brand. What are the brand values or the brand essence that you want to communicate? For example: price, convenience or quality based.

4.8 Tone of voice

How do you want to sound? For example: straightforward, friend or adviser. Serious. Energetic. Dynamic.

4.9 Creative

Opportunities and collateral available for:

- Rich media and video.
- Content and guides.
- Viral effect – what will be the viral agent?

Part 5: Campaign Plan and Budget

5.1 Bought media

Online potential media sources. Specify sequence and their approximate budget split:

- Paid search ads.
- Display ads.
- Search engine optimisation.
- Third-party newsletter ads.
- Website downloads.

5.2 Owned media

- Co-branded campaigns.
- House lists.
- Communications on website.
- Additional content.

5.3 Earned media

- Blogs and RSS.
- Social media marketing.
- Viral marketing.

5.4 Available budget

Total budget available for:

- Strategy, planning and research.
- Creative and content assets (eg. videos).
- Bought media.
- Earned media.
- Testing and in-campaign optimisation.

5.5 Cross-channel integration

How should this activity integrate with other marketing activity?

Part 6: Campaign Measurement

6.1 Current baseline

Outline the current performance baseline.

6.2 Integration

How will integration between different media channels be assessed?

6.3 Media plan

Sequence of waves of campaign.
Append a media schedule if applicable.

6.4 Progress

What KPIs do you want to put in place?

6.5 Test and learn

- How will you monitor and adapt the campaign?
- Plan for optimisation.
- When to re-evaluate.



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