



THE HODGES PARTNERSHIP

# MARKETING & COMMUNICATIONS PLAN SELF-ASSESSMENT

Step-by-Step Guide



## BEFORE WE GET STARTED

**Establishing a strong, effective PR or marketing program is no easy feat – nor something that can be done overnight. It takes time, commitment and a little bit of gusto. But when done well, it can be transformative for an organization hoping to position itself to the stakeholders that matter most to its success.**

The challenge for many organizations is knowing where to start. A quick Google search on marketing trends will spit back a litany of strategies and tactics, each promising all that your organization is hoping to achieve. And many of these can be wildly successful, but you first need the right pieces and parts in place for that to happen.

This is where many organizations get tripped up. They understand the different elements of an effective PR or marketing program, but not the order in which they should develop them.

Think of building a successful marketing program like building a house. Many of the trendy strategies are akin to furniture and fixtures. They are fun and flashy. And they are easy to wrap your head around and articulate the value they'll

bring. But before you're ready for that stage, you have to build the house, which includes ensuring there's a stable foundation to support everything in the long run.

*The same is true for marketing.*

Before an organization can dive into certain marketing strategies, there are things that first need to be in place – at least if you want to be successful. This worksheet helps answer exactly that: What elements do you need to address and have in place before you can move on to the next one?

One important disclaimer: We're not saying that that you shouldn't do any marketing before preceding questions are answered. We're simply saying that the success most organizations expect to see from their marketing efforts can be achieved only when these foundational ones are in place.

A final note: This isn't a magazine quiz where we can diagnose you by the number of yes and no responses you check off. These steps don't need to be answered completely before you can move on.

**Now, let's dive in.**



## STEP ONE: BRAND IDENTITY

This piece can seem deceptively simple – who are you and what do you do? But it's much more than that. A clearly defined brand creates a visual aesthetic that should guide all creative materials, help articulate your message, differentiate your services from competitors and help prospects remember who you are and what you offer.

This should be the heart of your marketing efforts.

### **ASK YOURSELF:**

**What is your organization's mission statement?**

**What are your brand values?**

**Do you have an established brand voice that informs the tone and style of your internal and external communications efforts?**

**Do you have brand assets and guidelines to ensure that your identity is consistent across your marketing efforts?**

**What are your organization's value propositions? What makes you better than your competitors or unique in your industry?**

**How have you taken your mission, values and value propositions and expanded those into key messages and talking points for your organization?**



## WHAT SKIPPING THIS STEP MEANS:

Not having this step solidified creates a lot of problems that could have a ripple effect through everything you touch. Your brand could portray something totally different from what you offer. Your marketing efforts could come off as random and unfocused. You could be missing the opportunity to differentiate yourself from competitors...

*You get the point.*

Without a clear brand, you're just another organization without a clear voice or aesthetic to grab people's attention. But by answering these questions and taking a moment to reflect and create or refine your brand identity, you're grounding whatever strategy you build on top of it.



## STEP TWO: ORGANIZATIONAL AND BUSINESS GOALS

Okay, so you have a brand identity, meaningful values and key messaging that do a fantastic job at explaining why you're the best. Great, but you're not quite ready to dive into the nitty gritty of marketing.

What do you want to achieve as an organization? This is much (much) more than "make more money, get more clients, be the best." This needs to be a clearly stated goal for how your organization wants to progress in a specific period of time.

Clearly articulating this step doesn't just help PR and marketing, it guides and anchors all aspects of the organization. There can be a big challenge for some with this step, though, if they don't have a seat at the table when these conversations are happening. Additionally, even if these goals have been set, they might not be widely known or accessible throughout the organization. For individuals encountering these issues, completing this step will involve some detective work and advocating that your department be included in this discussions – or at the very least, routinely briefed following any goal-setting meetings.

### **ASK YOURSELF:**

**What goals has your leadership set for the next six months, one year, five years, ten years?**

**Are your goals clearly defined and measurable (aka, are they S.M.A.R.T.)?**

**Has the organization's vision been communicated internally and do individuals and/or departments have an understanding of what their objectives are?**

**Do you have a clear understanding of who your competitors are?**

**Do you have a strong sense for which verticals/markets present the biggest opportunity for your organization?**

**What work has been done to ensure departments are aligned and collaborative to ensure progress is made toward the organizational goals?**

**What services/products/offerings are most popular/profitable with your customers/clients?**



## **WHAT SKIPPING THIS STEP MEANS:**

Do you like wasting money? Because skipping this step means you're going to waste money. Full stop.

Vague goals mean departments and individuals will interpret things differently, and subsequently, pursue strategies that aren't in line with what the organization is trying to achieve to remain profitable and to grow. It also makes quantifying success impossibly difficult. Establishing organizational goals means departments, including PR and marketing, can create their own goals that dovetail and support the larger mission.



## STEP THREE: MARKETING, COMMUNICATIONS AND PR GOALS

Your organization has a brand! It has goals! So, how is your department going to support those elements?

Like the previous section, this step is critical in developing focus and differentiating success from failure. It's also a tremendous opportunity to help your department shine, while also supporting the greater goals of the organization. If the organization knows exactly what success looks like (and that definition of success is measurable, and of course, reasonable), you can develop a plan that fully supports those goals.

### **ASK YOURSELF:**

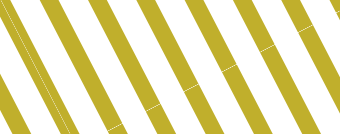
**How does your department support the organizational goals outlined by your leadership?**

**Are your goals clearly defined and measurable (back to the S.M.A.R.T. goals from the previous step)?**

**Does your organization have adequate staff and budget to meet those goals?**

**What KPIs are important to leadership?  
What KPIs are important for your specific department goals? Sometimes, these may be different.**

**If your organization is sales-driven, are marketing and sales departments aligned – strategically, tactically and administratively?**



## **WHAT SKIPPING THIS STEP MEANS:**

Unless you like leadership questioning the value you and your department bring to the organization, do not skip this step. This step ensures you think through what you need to be successful and how to push back or re-align expectations if you don't have the staff, bandwidth or budget to meet your company's broader, organizational goals. And having all the goals defined – both at the organizational and department level – then allows you to better define your personas to ensure you're talking to the right people who will help you get results.





## STEP FOUR: PERSONA DEVELOPMENT

According to Domo, in the digital world, every minute there are 347,222 Instagram stories posted, 147,000 photos uploaded to Facebook and \$1 million spend by consumers online. Every single minute.

That's a crowded space.

It's no surprise that people tune out any and all messages that don't personally resonate with them. This is exactly why you need to understand who your ideal customers are, what pain points they're trying to solve, how they like to receive information, etc.

Trust us, you can spend a lot of money on really smart-sounding content, but if it's not written in a way that speaks to who you're trying to reach, and if it's not posted where your target customer gets information, it's all for naught.

### ASK YOURSELF:

**Who do you need to be reaching to achieve your marketing goals?**

**Have you defined these personas and/or revisited them recently (let's say, in the last five years)?**

**What is your persona style – does your team like full-fledged, named personas complete with a photo? Or, do you just need a snapshot view to serve as a reminder for your team?**

**Do you understand the latest challenges and issues facing your personas?**

**Do you have a strategy in place for communicating to each persona based on their needs and preferences?**

**Do you have persona-specific messaging to highlight the products, services or experiences most relevant to them?**

**Do you have a process for accepting and reviewing feedback from these personas?**



## **WHAT SKIPPING THIS STEP MEANS:**

We're not saying you need to have the life story created for all of your personas, but if you don't have these defined in some way, your organization likely will come off as sounding like it's trying to reach everyone, which invariably means you'll reach no one. Stick with five or fewer personas and prioritize them. This will help with the tactical planning, like content and channels – you know, the fun stuff.

Lastly, if your personas haven't been updated in a while, your messaging will sound grossly out of touch. Hello, global pandemic.



## STEP FIVE: CONTENT, CHANNEL AND PROMOTIONAL MIX

Yes, there is still more to do, but we're almost there! Understanding your content and channel mix is where a lot of the big marketing trends start coming into play. But still, it's a lot more than "doing content marketing" or "writing a social media editorial calendar."

You need to be developing unique content that piques each of your persona's interests. It also needs to reach them where they are so they actually see it. Did you know only 5% of your social media followers see your content (according to Sprout Social)? If you're solely relying on organic social media posting to get the word out, well...we have some bad news for you.

### **ASK YOURSELF:**

**What channels are you using to reach each of your personas?**

**For your social media channels, do you have a defined purpose and brand voice for each of those?**

**Are the KPIs you're using to measure success align back to your department goals? The organizational goals?**

**What type of content do you produce? Does your content differ by platform?**

**What is your strategy for "slicing the content turkey" and breaking content apart and repurposing it across your organization?**

**Are you building out custom audiences and retargeting campaigns to ensure you're keeping prospective customers in your funnel?**

**Do you have a dedicated budget for content development and promotion?**



## **WHAT SKIPPING THIS STEP MEANS:**

You're going to be chasing \*a lot\* of shiny objects if you skip this step – again, wasting a lot of money.

Nailing down this piece helps you make informed decisions on how you should invest resources (both staff and out-of-pocket) to produce different types of content, manage a mix of platforms and produce advertising campaigns that ensure your content efforts aren't in vain. We meet with a lot of companies that haven't thought through this step and are haphazardly spending thousands on marketing efforts with no real rationale or expected ROI. That won't look good in the annual report...



## STEP SIX: PLAN/PROGRAM PERFORMANCE

Finally, the end – sort of. This last step is how you go about evaluating your PR and marketing program performance. With so many dashboards and reporting platforms, it is incredibly easy to go down a metrics rabbit hole and spend hours producing 50-page reports of tables, graphs and screen shots.

But if they aren't giving actionable insight, what's the point?

This step also answers how all your different efforts and channels work together. As the great Jack Donoghue says, "synergy." And, if you're not seeing all the cogs in the machine working together, this step helps identify what isn't working and what you can do to tweak the plan to get back on track.

### **ASK YOURSELF:**

**What cadence do you have for reporting?**

**What expectations does leadership have on reporting – format, depth, cadence?**

**Have all organizational and departmental goals been addressed in your reporting?**

**How does one channel impact another? Are there some channels that prove to have a better ROI (time and \$\$)?**

**Do you have built-in check-ins to make sure the plan is still on the right track?**

**What's your approach to ensure the plan is adjusted to get back on track?**

**Are there any knowledge gaps between perceived performance and measured performance?**



## **WHAT SKIPPING THIS STEP MEANS:**

Skipping this is what differentiates good from great. If you do all the preceding steps well, you'll likely have an adequately successful PR and marketing program. But if you've made it this far, are you really willing to settle for "adequately" successful? The more you can answer this section, the more likely you are to impress your organization's leadership, and in time, earn a seat at the table, if you haven't already.

## ARE YOU STILL WITH US?

You made it to the end, great! We hope this worksheet was helpful in developing a better understanding of not just what PR and marketing elements your organization needs, but what you should do first. It is remarkably tempting to jump to the “fun” stuff, but trust us, if you spend the time and money getting the foundational elements in place, you will be so much more successful down the road.

And if you were confused at any point during this exercise, please reach out.

We do this work every day; it's one of our core capabilities called Research & Insights. There's nothing we love more than helping companies of all sizes figure out their marketing efforts – even if it means pointing them to another specialist that is better suited for their current needs.

We just want to help.

### WANT TO GO DEEPER INTO USING CONTENT INTO USING CONTENT TO ACHIEVE PR GOALS?

Download our e-book *How Content Programs Have Become PR's Number One Strategy*

