Introduction

Digital Marketing Planning Template

Welcome

Thanks for downloading this Smart Insights template. We hope you find it useful in creating a plan to make more use of online 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". A common format helps align your plan to other marketing plans!

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 fact-based and state assumptions, 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 monthly or quarterly.
- ☑ **There isn't a perfect plan**. What's needed changes according to each business!

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 recommend the SOSTAC® planning structure developed by PR Smith, Dave Chaffey's co-author on *Emarketing Excellence*.

SOSTAC® gives a great framework for business, marketing or digital marketing plans since it's simple and logical, so it's easy to remember and to explain plans to colleagues or agencies. Each of the six areas help in separating out the key strategies, for example customer acquisition, conversion and retention.

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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