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What's the Big Idea?

Developing a strategy for your marketing and communications plan.

By Tom Rankin, APR

We've all heard the question, "What did he (or she) know and when did he know it?" The marketing communications version of this is, "What do you need and how do you know when you need it?" As we mentioned last time, the answer is found through strategic planning.

The word strategic is important here because many people think they are doing adequate planning when they decide to, "Do A, B and C." But this is simply a tactical exercise. It's like making a list of items to buy at the grocery store without regard to whether you're hosting a dinner party or just having a neighbor's kid in for lunch. The strategic part of planning provides context. It provides the rationale behind the list. It helps you define what you need and when you need it, and gives those elements meaning and direction.

Taking a Fresh Look

Strategic means looking at the big picture and to do that your communications plan needs to dovetail with your overall marketing plan. The problem here—planning marketing and communications—is that marketers become so familiar with the circumstances of their business that they don't really think about them. Rather than gather fresh data, they rely on old assumptions. Rather than bother with any rigorous new analysis, they jump to the same old conclusions.

To be an effective planner, you need to shake up your thinking and take a fresh look at your situation. One way to do this is to formalize the process by committing it to writing. You should also get others involved: your managers, sales force, operations and application people, perhaps even some customers. Brainstorm. Write things on big easel pads and stick them up on the walls. Here are some of the things you should look at:

Your Business

Who are you, really? A start-up, growing fast but with many hills to climb? A well-known behemoth, cruising majestically along, professionally managed from top to bottom? A business in transition with an engineer/founder retiring and new professional management phasing in? Is the business healthy and prosperous? Struggling? Have sales been hitting targets? Do you have the resources to fund growth, and will that require heavy capital expenditures? What do you bring to the market in terms of products and services? Are you state-of-the art, or tail of the dog? What are your strengths and weaknesses? What plans are in place/ needed to improve? Take a good, hard look here, and don't shirk the tough questions.

Your Market

What's happening out there? Is the market expanding, contracting (going overseas!)? Are new technologies changing the way things are done, new players/foreign competition entering the fray? What are the niches and opportunities? Do new customer processes present new opportunities? Can a more standard, or a more customized product and/or faster delivery times meet current needs? What major trends can you name, and are you swimming with the current, or shivering on the bank?

The Competition

Who are those guys, and what are they up to? How do you stack up to them, they to you? How are they handling the market situation? What are they presenting as their strengths/key messages? How can you counter? What are the chinks in their armor? Do a little undercover work at trade shows and get their pitch. Remember, even a dragon can be missing a scale in a vital spot.

Your Universe

As Todd Grimm asked in the [January issue](#), what is your particular spot in the market universe? Local, regional, national, international? Where do you play now, and more importantly, where would you like to play? What do you need to do to get there? Make a list. Make several lists.

Your Objectives

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Where do you want to be in one year, three years, five or even 10 years? Not all objectives can be accomplished in one year. Write these things down. Good strategic plans look long term.

Analyze This

Think of this whole mess of information as a chess board or football field and all those components as players with the ability to move in various ways. Then ask yourself, what is the dynamic here? Which way are things moving? What's driving the game? What strengths and opportunities do we have that can drive things our way? What areas of weakness can we improve on, which should we work around? In short, what do we want to achieve; what, realistically, can we achieve, and what do we need to do to achieve it?

From all this, you should develop a strategy statement. It doesn't need to be long or elaborate, just a few bullet points or a couple of sentences, but it should provide a clear statement of intent and direction that can serve as the basis of your overall marketing plan. It should be something that all of the key players in your organization can clearly understand, and more importantly, buy into.

To develop the specifics of a communications plan based on this overall strategy, think in terms of three questions: who do we want to talk to, what are we going to tell them and how are we to deliver the message?

Define Your Audience

Who do you sell to? Who influences that sale? Studies have shown that most capital equipment purchases are made not by individuals, but by buying teams frequently composed of between nine and 12 individuals, and rarely fewer than six. These teams include a broad slice of management disciplines and concerns—from engineering and accounting to R&D, purchasing, production, and yes, even senior corporate executives. Salesmen rarely have access to the entire team. In fact, one study showed that 64 percent of sales calls were directed at influencers, not decision makers.

Only by using other means of communication can you hope to reach and influence a significant portion of the buying team. And to do this, you need to know who they are, what their concerns are, what media they read, and how you can reach them.

What's The Message?

The thing about messages is that people get a lot of them. Too many, in fact. So they screen them, paying attention only to a certain few, and frequently making harsh judgments about those who propagate the others. So messaging is not a thing to be taken lightly if you want your communications program to succeed. In determining what you are "going to tell them," it is not enough to extol the long catalog of your virtues. You also should consider what your audience might want to hear.

Put yourself on the other side of the desk. What is it about your organization, products, processes and services that is important to your customers and prospects? Why is it important to them? What are their needs, and how can your offerings satisfy them? Bear firmly in mind that your prospects really don't care about you unless you give them good reason to. It's not personal; they just have their own pressing concerns.

Focusing on customer concerns is fertile ground for your messaging. Talk about this with your sales force. What do prospects ask most about? What needs do they typically express? What issues? What are their hot buttons? What offerings—other than price—are the real deal closers? Conversely, what makes their eyes glaze over?

Also, take a good hard look at your competitors' promotions and literature. This will give you insight into what they consider to be key messages. Don't simply copy these, but try to backtrack from them to discern their strategy. Then figure out how you can differentiate yourself from them and use their platform to your own advantage.

Figuring out how to deliver these messages cost-effectively takes us into the rather large realm of communications tactics. We'll talk more about these elements in upcoming columns.

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