

HOW TO WRITE A BETTER BRAND PLAN
THAT UNCOVERS OPPORTUNITY, DRIVES CHOICE & DELIVERS RESULTS
My top tips & tools from 20 years of big wins, a few fails & trying to do too much!

With the uncertainty, inconsistency and confusion the 2020's has bought it, it's no surprise that I have spent the better part of my working hours helping clients create clarity and direction via brand planning.

Together, we have tackled some pretty juicy brand challenges, made sense of the ever-changing external market and made logical, disciplined choices about which opportunities or threats to pursue and which distractions to avoid.

There have been many vital learnings and a-ha moments achieved, so along the way, I shared our tips and insights with my community, receiving some great feedback from you all.

So I have decided to collate it all into a Better Brand Plans guide to help others embark on a journey of strategic brand planning.

This guide will contain all the top tips and some of the tools I use during my planning process with my clients. Armed with this information, you too can embark on a process to write a better strategic brand plan that drives choice, creates direction and grows your brand.

HOW TO WRITE A BETTER BRAND PLAN
THE PROCESS, TOOLS & TIPS YOU NEED TO UNCOVER OPPORTUNITY, MAKE CHOICES & DELIVER RESULTS

- Chapter 1**
The importance of brand planning and a three-phase process
- Chapter 2**
Define your brand challenge before you start planning
- Chapter 3**
Take an outside-in approach to uncover growth opportunities
- Chapter 4**
Make choices about which growth opportunities to pursue
- Chapter 5**
Set the goalposts by writing specific, measurable objectives
- Chapter 6**
Choose the right strategies to score your goals
- Chapter 7**
The importance of writing tactical plans for all 4 P's
- Chapter 8**
Measure & track your plan's success
- Chapter 9**
Use brand planning to build the credibility of Marketing
- Chapter 10**
Implement a brand planning process in your company

Marca

This guide is a must-read if you:

- Want to write better brand plans & improve your current planning process to create clearer direction for your business
- Currently have too many initiatives on your plate, and you need to make choices to prioritise the big rocks
- Have previously worked for organisations that had a formal brand planning process, but your current organisation doesn't have one....and needs one
- Have never written a brand plan before, but you want to learn why it is so important and how to do it

Enjoy!

A handwritten signature in black ink that reads "Anne Ricci". The script is fluid and cursive, with the first letters of "Anne" and "Ricci" being significantly larger and more stylized than the rest of the letters.

Better Brand Plans start with a logical, disciplined process

Chapter 1: The importance of brand planning and the three-step strategic planning process

Now, the fact that you are here means that writing a Strategic Brand Plan is on your radar or is a skill you'd like to get better at.

But if you are like most of my clients, finding time to escape the vortex of the day-to-day operations of your brand and business is a complicated task.

Let me tell you, the benefits of taking time out to write a strategic brand plan for the year ahead are enormous!

- The plan creates a long-term vision & maps out a robust, sustainable growth path for the whole business to get behind. Let marketing lead the growth agenda.
- The plan provides clear direction to make your day-to-day actions & decision making more effective & efficient. Reduce the impact of the vortex by having a clear goalpost to work towards
- The plan will help you make choices & prioritise your focus. It will ensure your increasingly scarce resources and time are allocated to the initiatives that will make an impact. At its very core, Strategy is Making Choices.
- Set specific, realistic objectives and KPI's that you can track and report the results and achievements of the plan. Be the rockstar who can demonstrate their contribution to the business
- Achieving the above will help reinforce Marketing and your brand assets as the growth engine of the business.

To get you started, I have summarised my three-phase planning process I use with my clients which you can download [here](#).

Over the coming chapters, I will dig deeper and share various tips and tools that will help you break down the process into manageable chunks.



This three-phase approach ensures you:

1. Properly define your scope and brand challenge before you even start. (You don't want to get lost in the weeds!)
2. Undertake a thorough situation assessment to uncover powerful growth opportunities based on facts and insight.
3. Write a plan that sets measurable objectives and actionable strategies to solve your challenge, deliver results and inform your day-to-day actions and decisions.

I see too many companies and brands shortcut the problem and go straight to step 3 without first correctly diagnosing the issues that are stopping the brand from growing and conducting a robust search for market opportunities and company capabilities that could help them overcome these challenges.

The following three chapters will demonstrate how necessary these first two steps are to ensure your resulting strategy is grounded in facts, insight & logic – ensuring the plan is actionable and will deliver the results you desire. This is probably the biggest and most impactful change I implement with my clients when I start working with them. They quickly realise that doing the hard yards up front ensures you get a killer brand plan at the end.

Are you ready to write a better brand plan? Get started by downloading the Better Brand Plan process summary [here](#)

Define your sandpit before you start digging

Chapter 2: Define your Brand Challenge before you start digging for answers

One of the most significant barriers stopping brand teams from writing a brand plan is that they fear they will get lost in a time-sucking rabbit hole of data and analysis and not come out the other end with anything new or actionable.

Valid call – because I have seen it happen many times! We have so much data and information available to us that it is very easy to get lost in the weeds and not find anything meaningful

But I have found it won't happen if you **define your SANDPIT upfront to frame a more targeted, efficient planning process!**



Now you are probably thinking, "Anne, what has a sandpit got to do with brand planning?"

Good question!

Before you start writing any plan, you should always spend the time to fully understand and define the main problem or challenge that the plan needs to solve.

The definition of this challenge becomes your sandpit, and it will guide a targeted, efficient situation assessment to uncover your opportunities to grow.

You will know exactly where to dig for facts, insights and answers.

Think about it. You are more likely to find your answers quickly in a defined sandpit than searching endlessly in the Sahara desert! You should refer back to your sandpit for guidance and context whenever you feel like you are getting lost in the weeds or straying off course.

Defining your sandpit is not time-consuming and is the critical first step in the three-phase planning process.



You can Define the Challenge by asking a few top-line questions about the brands current performance to expectations and the broad market dynamics affecting that performance.

This doesn't need to be an intensive analysis; it should be based on what you already see in your numbers or conversations you are already having with your team.

You only need to spend an hour or two making sure you have correctly understood, chosen and defined the **real challenge** your brand is facing. Once you know the problem you are solving, it makes writing the solution a lot easier.

You can [download some of my prompting questions](#) here to get you started.

Send me a message anne@viamarca.com.au and share your answers with me. I'd love to hear about the challenges your brand is facing, and I am more than happy to give you any feedback.

I also have a great one-page template, complete with an example, that can help you effectively articulate your Strategic Challenge and sandpit. Your sandpit sets the context and becomes your north star for the rest of the planning process, so you must get this right.

Let me know via return email if you'd like me to send it to you or if you'd like some feedback on your thinking.

anne@viamarca.com.au

Uncover ground-breaking, actionable insights

Chapter 3: Take an outside-in approach when searching for growth opportunities

Last chapter we talked about **defining your sandpit** to frame a more targeted, efficient planning process. Before you start writing any plan, you should always spend the time to fully understand and define the main problem or challenge the plan needs to solve.

This definition will now guide the 2nd phase of the planning property, FIND OPPORTUNITY.



Your sandpit will ensure you are digging in the right places to find potential answers to the brand challenge. I call these possible answers your Strategic Options! The aim is to uncover multiple Strategic Options so you can make informed decisions about which ones are the best options to take.

Which choices will solve your Strategic Challenge?

Which choices will grow your brand?

The first step to finding these Strategic Options is to conduct an **outside-in situation assessment**

Your situation assessment should be conducted from the **outside-in** because

opportunities to grow are found outside the organisation

while the capabilities to unlock that growth comes from inside the organisation

What does an outside-in situation assessment look like?

1. The first step of the assessment should always be to find those new **opportunities or threats** via an external assessment of your market. We call this the **4C External Assessment** as you should cover **C**ultural trends, **C**onsumers, **C**ategory performance and **C**ompetitive actions.
2. Only then do you conduct an internal audit to understand your **current or potential capabilities and barriers** within your brand and organisation. We call this the **6P Internal Assessment** as you should cover **P**ositioning, **P**roduct (or Service), **P**romotion, **P**lace, **P**rice/**P**rofit & **P**eople/Expertise
3. Finally, you connect the two to make it actionable. This step involves matching the external opportunities or threats with your internal capabilities. Which market opportunities (or threats) is your brand and business best placed to tackle and deliver the growth you need?

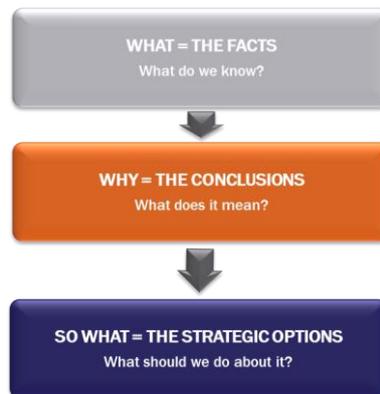
Perhaps this is better explained in this image:



A logical process to conduct the situation assessment is required

The art of finding these opportunities and building actionable insights takes practice and a disciplined and logical assessment process I call **Connect the Dots**. Much like a constellation, this process is about connecting different fact sources together in a way that uncovers actionable insights and a story of opportunity and growth for your brand

This process helps you convert the What (the facts) into the WHY (the conclusions) and the So WHAT could we do about it (the Strategic Options).



My top tips to ensure success in this Connect the Dots phase:

1. **Take a disciplined approach**, otherwise you will get lost in that time-sucking rabbit hole of data and surface with nothing.
2. **Strong insights = strong strategy**. Your situation assessment and resulting strategic options set the foundations for your plan, so it is essential to get it right. Do not cut corners or fast track this step of the planning process. If you do not uncover the right growth opportunities, you won't choose the right strategies to deliver the growth.
3. To find those breakthrough opportunities to grow, you need to **look beyond the obvious and connect the dots in a way that your competitors are not**, because they have access to the same data as you do. Connect the dots and build your story several times to find a unique way in. One that gets you excited for the future and instantly springboards ideas.

If you'd like a deeper explanation and demonstration of the Connect the Dots process and the situation assessment phase of the brand planning framework, then please reach out to me at anne@viamarca.com.au. I find the Connect the Dots process is best explained via a practical application and guided facilitation through the process, using your own business, brand and data. I have a suite of

tools, templates and workshops to ensure the fact collection is effective and efficient and that the resulting Strategic Options are exciting & viable growth opportunities for your brand.

Just like defining your sandpit, you must give your situation assessment the due diligence to ensure:

- a. you uncover the most exciting and viable opportunities to grow your brand
- b. understand the capabilities and barriers that will either make or break the pursuit of this growth.

I would love to help you get there.

Fewer, Bigger, Better

Chapter 4: Making strategic choices about which growth opportunities to pursue

I often meet with clients who have written a good strategic plan full of fantastic ideas. But they are struggling to get traction and deliver the promised results. Not because the opportunities weren't real, and the strategies/tactics weren't right.

It is because they are trying to do too much and don't have the right prioritisation and resource allocation in place. The small pebbles are sucking up time and resources that should be put behind the big rocks.

It's a great reminder that while we can go through the process of writing strategic brand plans, we can't forget the core fundamental underlying the discipline of strategy development, that

Strategy is Making Choices.

- Which market opportunities should we pursue (or threats should we tackle)?
- Which strategies and tactics will we prioritise and action?
- What level of investment will we make behind each?
- And most importantly, how will we measure success?

Making choices is the single most important part of the planning process..... but it is also the hardest. Make the right choice, and you'll deliver the results. Make the wrong choice, and you may end up wasting a lot of time and money.

FEWER, BIGGER, BETTER

If you followed my Connect the Dots situation assessment process, you should have a list of viable and exciting Strategic Options from which you need to choose a few to pursue.

Remember, Strategic Options are those market opportunities or threats that your brand & business has the capabilities to pursue.

Plotting, prioritising, and choosing which Strategic Options is the next step in Phase 2 of the planning process



To complete this phase, I like to use a simple 2 x 2 grid that will help you segment and prioritise your potential opportunities using two sets of criteria:

1. The potential **impact** the opportunity or threat may have on your organisation
2. The **ability** for your brand and organisation to execute against it



This prioritisation exercise will help you segment your opportunities into one of four quadrants, ready to prioritise.

1. Easy Wins - the low hanging fruit. Significant impact, easy to do. These are the ones you should prioritise for the short term and resource accordingly.
2. Bold Moves - harder to do but will make a significant impact. Put them in your long-term plan and assign resources to build the capability to execute.
3. Second Tier - smaller impact but relatively easy to implement, so assign the minimum resource required and get them out the door.
4. Why Bother - throw them out or put them aside for the next planning horizon if you think the potential impact might grow over time.

Once you have your opportunities plotted on the grid, it is time to prioritise and make the tough choices about which ones will make it through to the final phase of the planning process TAKE ACTION, where you set your objectives and choose your strategies and tactics.

I find making choices is probably the hardest part of this process for my clients. Not only are you so close to the options and the implications of your decision but you likely have some internal politics to deal with as well.

If you'd like someone to help you make those tough calls with a fresh set of impartial eyes and plenty of experience facilitating these decisions, then you know where to find me 😊. Just hit me up on email to set up a session

anne@viamarca.com.au

What gets measured, gets done

Chapter 5: Set the goalposts with specific, measurable objectives

We recently saw the perfect example of “what gets measured, gets done” when COVID vaccine rates were slow at the outset. It wasn’t until our Premiers set specific targets, with rewards promised for when we reached those targets and daily reporting of our progress, that we saw the rates exponentially increase.

This is why setting specific, measurable and achievable objectives is such a critical part of your brand plan. It gives everyone a goal post to work towards and the ability for you to track and report your achievements.

Give some one a goal to achieve, it is more likely it will get done.

If you have been following my planning process, you have now

1. Identified the core strategic challenge your brand is facing and that your plan must answer
2. Conducted a thorough, logical and disciplined situation assessment that connect the dots in a way that uncovers & chooses the exciting, viable Strategic Options that your brand and business has the capabilities to pursue (or the threats and barriers it must overcome to protect & grow)

Now it is time to move to phase 3 TAKE ACTION! It is time to start writing the plan to derive growth from these opportunities.



Your brand action plan will need to consist of three components:

- a. **O**bjectives. The **O**utcome and the metrics you use to measure success. i.e. commercial results and brand health metrics
- b. **S**trategies. The **S**olution to getting there. To achieve the outcomes and metrics stated in the objectives. i.e. meeting new needs, entering new occasions, overcoming barriers, improving availability, building brand equity
- c. **T**actics. The **T**asks you need to perform, i.e. launch or improve a product or service, communicate a key message, gain distribution, implement a profitable pricing strategy - with specific timings, resources and investment required

I always start with the objectives because we need to know the end game to then craft the necessary strategies and steps to get there.

First, I like to define the broad objective.

- a. What is the **consumer outcome** we need to achieve to optimise the growth opportunity we have found in the sit assessment? Ultimately there are four ways you can grow a brand by changing consumers purchase and usage behaviour

Four Ways to Grow



Maria[®]

- b. What is the broad **measure of success**? e.g. the commercial metrics you'd like to achieve such as sales, share, profit? Or the brand health metrics such as awareness, trial and repeat or brand equity attributes.

Then I determine the Strategies and the Steps we need to get there, e.g. Meet new needs, enter new occasions, overcome barriers, build equity etc (I'll dive deeper into Strategies next Chapter)

Finally, I return to the Objectives to complete the maths and set the specific targets I will use to measure success. **When I know the steps I will be taking, I will have a much better idea about how far I will move the needle.**

Are you clear on the measurable outcomes your brand plan needs to deliver?

Allocating specific metrics is often the hardest and, therefore, the most evaded step in writing a brand plan.

I often see broad, fluffy objectives such as "Grow awareness of our brand and attract new consumers to deliver sales of \$5M"with the \$5M figure coming from the finance forecast. Sometimes there isn't even a sales target in the objective

What I'd prefer to see in this objective is:

- Who is the new consumer you are attracting - demographically & attitudinally?
- What is their current awareness of your brand, and what's your target awareness?
- What's the maths behind the \$5M? How many of these new consumers will you need to attract, and how much will they need to spend to get to \$5M? Can it be done?

Putting the maths behind the numbers and spelling out the specific metrics you need to achieve will ensure **your objective is measurable and achievable**. Then, throughout the execution of the brand plan, you should be tracking your progress to these objectives, course correcting when required and then shouting from the rooftops when you achieve the objectives!

THIS is how you build credibility and support for your brand plan & marketing investment within the organisation. **Show them specifically how you are moving the needle to grow the business.** But more on this in Chapter 8.

So, where do you get the data and rationale to build your objectives?

From your situation assessment, of course! Another critical reason it took us five Chapters of emails before we got to the action phase.

Linking the situation assessment to your objective setting is THE most important step in the planning process. It shows that the facts and data behind the Strategic Option you have identified has been used to inform the outcomes you expect when you pursue them. Setting objectives is not about setting lofty, pie-in-the-sky ambitions. It is about setting specific, measurable, accurate, realistic and timely goals – based on fact and logic!

Finally, try and craft your objective into a pithy one-liner which is easy for the whole organisation to adopt and repeat. It can become your growth mantra and rally cry.

And you know what is coming next..... I have a template and some foundational formulas to help you set your objectives and then do the maths to confirm your metrics and targets. Every situation is different, so feel free to drop me a note to work through your individual needs.

Building the Strategy Bridge from opportunity to results

Chapter 6: Choosing the right strategies to score your goals

Last chapter we moved into the action phase of brand planning, laying out your desired Objectives to pursue the Strategic Options you identified in your situation assessment.

To recap, your brand action plan will need to consist of three components:

- a. **O**bjectives are the **O**utcome and the metrics you use to measure success. i.e. commercial results and brand health metrics
- b. **S**trategies are the **S**olutions to get there, to achieve the outcome and the metrics. i.e. meeting new needs, entering new occasions, overcoming barriers, improving availability or building brand equity
- c. **T**actics are the **T**asks you need to perform, i.e. launch or improve a product or service, communicate a benefit, gain distribution, increase the price

So it's no surprise that this Chapter's email will focus on Strategies, i.e. the Solutions we choose to use, to achieve our desired outcomes.

Yes, there is that word again – Choice! Based on our brand and business's capabilities and barriers, we have already chosen which market opportunities or threats we wish to pursue.

Now we must choose which strategies we will implement to take advantage of these opportunities, overcome the threats, and achieve our objectives.

And there are often several options from which you could choose.

 New Needs/Benefits	 New Occasions	 Overcome Barriers	 Improve Availability	 Build Equity
How might we tap into new or broader consumer needs, problems or purchase drivers to encourage new or increased usage?	How might we find new occasions or usage ideas for our brands and existing products?	How might we remove the barriers that are preventing consumers to using us more often or at all?	How do we expand the availability our brand into new channels, markets or strengthen it's presence in existing channels & markets	How might we build the emotional connection with our brand, boost the personality or immerse consume in an experience to strengthen the bond with the brand?

To help my clients make these choices, I like to talk about the strategy bridge.

One side of the bridge sits your current challenges and opportunities, as identified in the situation assessment.

On the other side of the bridge is your desired future state, as determined by the Objectives.

You now need to choose the right strategies which will allow you to cross the bridge from 'NOW' to the 'FUTURE' successfully.

For example:

If your 'NOW' has uncovered an opportunity of a growing, sustainably-aware consumer segment who are entering your category because of the planet-friendly benefits of plant-based foods

And you have set the 'FUTURE' objective to attract a younger, sustainably-focused SINKS and DINKs to grow household penetration of your plant-based meal range by x% and market share by y%

Then what might be the best choice of strategies to attract this segment and achieve your objectives? You could:

1. Focus on the benefits such as the planet friendly benefits of plant-based meals vs the meat alternatives?
2. Overcome the taste barrier that might exist?
3. Improve availability of your range where this segment shops for dinner?

You need to ask yourself, which options are the most compelling to these potential new customers and within your brand's ability to execute?

Finally, remember our choice mantra – FEWER, BIGGER, BETTER?

It is essential to conduct another round of prioritisation in the action phase to ensure you don't try and commit to too much, stretch your resources too thinly and not deliver on anything properly.

If you'd like someone to help you make these important choices, you know where to reach me and my tool kit of logic and discipline 😊

The magic is in the 4P marketing mix

Chapter 7: The importance of writing tactical plans for all 4 P's

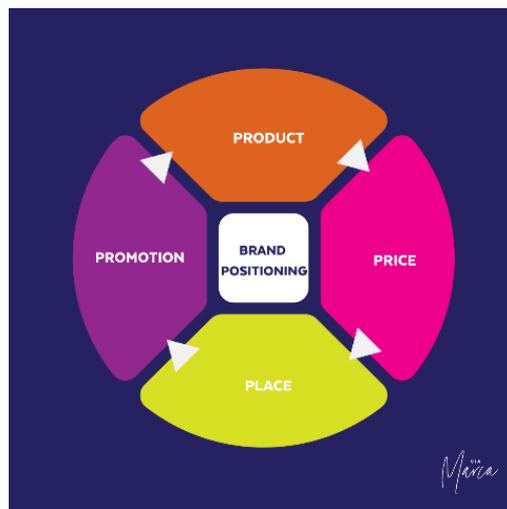
Over the course of the last 6 chapters, I have been moving through my brand planning process with tips and tools to help you write better brand plans that will bring clarity, create direction and deliver prioritisation & focus to your day-to-day.

This chapter, we move into the last phase of the plan development - the tactics!

The actual activities and projects you will resource and execute to achieve your strategies and deliver your objectives.

To have the best chance of hitting these metrics, you should be developing tactics across the entire marketing mix - all 4P's - Product, Place, Price & Promotion

(Or possibly 6 or 7 P's depending on where you work :) But let's not get into that debate!)



However many P's you work with, the point I want you to take away is that you should INTEGRATE your tactics across as many P's as you can to deliver more effective growth plans and achieve our Choice Mantra – FEWER, BIGGER, BETTER.

There is no point placing a brilliant **Promotions** campaign in the market if the **Product** doesn't meet consumers needs or expectations created by the campaign, they can't find the product in the **Place** they would expect to be able to buy it, and the **Price** isn't what the consumer would expect to pay for it.

All 4 P's are inextricably linked to the other, and when working cohesively, they form the positive brand experience necessary to drive growth.

However, many of my clients will stumble across a barrier at this stage of the process, and I will hear

“But Anne, we don't own all of the P's in the marketing mix, so how can we develop a plan for all of them?”

It's true, not every brand manager has full OWNERSHIP of the P's

But it shouldn't stop you from having a degree of INFLUENCE over them.

And to lead the integration of all P-tactics towards the common goal of brand & business growth.

Even if you don't own certain parts of the marketing mix, you should seek to align & integrate your brand strategy with the other functions, who do have ownership at this point of the planning process.

The most effective way to achieve this integration is to take your cross-functional P-owners on the entire brand plan journey with you.

- Get them to help collect facts and fill the buckets that are relevant to their P and area of expertise
- Involve them in both your Insight and Planning workshops, so they uncover the opportunities to grow and co-create the objectives and strategies with you
- Then develop the integrated 4P tactical plans together.

A brand plan may be led by the brand team, but in reality, you need the whole business aligned and involved in its execution.

You need:

☞ The R&D teams or Service Operation teams to ensure they are building an offer that solves your consumer's problems

☞ The sales team to align their distribution & ranging strategy to where your consumers are looking for your products or services.

☞ The sales & finance teams to ensure consumer behaviour is factored into pricing decisions alongside margins & profit

This collaboration will ensure you develop a consumer-centric yet commercially minded plan and work cohesively to execute it rather than in functional silos.

If you'd like some help leading an integrated planning process, this is where I can help because I have done it many, many times :)

Bringing your cross-functional partners in increases the number of participants and complexity, but I can help you run this process seamlessly. I can:

- Brief participants on their role and required contributions
- Facilitate engaging, productive workshops that bring cross-functional teams together, collaborating to develop consumer-centric but commercially minded plans.
- Bring a fresh perspective to your business and push your thinking to uncover new, actionable insights & opportunities.
- Unlock a complete set of tools (over & above what is in this guide) to drive disciplined & logical thinking.
- Share my proven formulas to uncover breakthrough insights, be ruthless with prioritisation & develop a set of objectives, strategies & tactics that cover all elements of the marketing mix

Let's get your entire team on the same page, be driven by your shared consumer, and develop plans that meet your business's broader commercial needs and capabilities. Send me an email so we can set up a time to chat further.

Did the plan deliver what it promised?

Chapter 8: Measuring & tracking your plan & its success

It's all well and good to write a killer brand plan that looks spectacular on paper. It's grounded in insight, sets clear & measurable objectives and selects the right strategies and tactics to achieve those objectives.

But the true test of a killer brand plan is whether it actually delivered what it said it would? Did you meet your objectives, hit your tactical KPIs and generate a return on your marketing investment?

Writing a strategic brand plan takes time and effort and often needs a considerable amount of money and resource to execute it in market.

And it is not something you do once and never have to think about again. You need to do it year in, year out. And some industries, more often than that.

So it is critical, as commercial business leaders, that you track and demonstrate the impact your plan has had on the business.

You need to demonstrate the plan's return on investment.

You need to measure and report back on whether your plan is achieving its objectives and the tactical KPI's, why it is achieving them and if it isn't, what you are doing to course correct it. Did you plan del

Now, tracking & reporting on your plans progress to demonstrate success and return on investment is the core reason we track.

But it isn't the only reason we should track.

If you work for a business that seems to prefer short term gains over long term brand building or see the sales function as the driver of growth and the marketing function as the "colouring-in" department (gosh, I HATE that term!)

showing the impact your brand plan and marketing investment has had on delivering revenue, profit and brand asset growth is the perfect way to demonstrate the commercial benefits the marketing function can deliver to a business

And help build your credibility as a function that leads the strategic growth agenda of the business.

I promise you that once you get one successfully executed plan under your belt, there will be no grumbling from leadership or other functions when you need to rally cross-functional resources to write, fund and execute the next one.

So do you have your brand plan tracker set up?

The tracker should contain each of your core objectives and tactical KPIs from the brand plan with a traffic light system and action plan clearly highlighting how you are tracking.

You should be reporting your progress monthly to your leadership team and other cross-functional partners who are vital to the execution of the plan.

But please don't try and sugarcoat the results. If things aren't going to plan, call it! And have a contingency in place to get you back on track.

Your end goal is to build your credibility as a commercial leader, so people need to trust your reporting. You don't want to be seen as a bullsh*t artist who covers up when things go wrong.

Be brave; call the situation and fix it. This will earn you a lot more respect than fiddling with the numbers until they look favourable and present a glowing report of your success.

Every set of objectives and available data is unique so if you'd like some help to design your brand tracker, just hit reply to this email, so we can decide which variables should be tracked and reported

Get others to see the value in brand planning

Chapter 9: Using brand planning to build the profile and credibility of Marketing in your company

Last year I sent out a survey to a selection from this community because I wanted to understand your current challenges in your roles and careers to better serve you and meet your needs

Hey, practising what I preach :)

I got an overwhelming response that your desire to think and act more strategically and with a long-term mindset is strong

But it is becoming increasingly difficult to action this desire because your senior leaders are more focused on prioritising short-term results and quick wins.

Now I don't have access to these leadership teams to try and shake some sense into them (unless you let me 😊)

So I thought about what actionable advice I could give you to help you convince your bosses to see the value in long-term, strategic thinking and brand planning, when all they want are results, now

Based on my experience of demonstrating the value in strategic planning both in my own career and more recently with my clients, here are my top tips to action:

1. First of all, adopt the mindset that you don't need to write a strategy every day, but you do need to execute and make decisions every day that align with your strategy.

Strategy is about making choices, so your strategic plan should inform every decision you make and action you take in your day-to-day. Therefore, depending on how fast your industry moves, you really only need to take time out to write a strategy about once a year. The rest of the time, you should be executing, measuring and course-correcting to implement the strategy and achieve your objectives.

2. Put a formal planning process onto your annual activity calendar, just like you would a launch or a campaign.

Schedule it in months ahead so everyone knows it is coming and has it in their work plan because everyone will need to be involved.

Ensure the time you choose considers the following:

- a. **It precedes the business forecasting and budget setting process.** The planning process should be completed before the forecasts and budgets are set. The selling point.....it will ensure your forecasts and budgets are based on real opportunity and action rather than a stab in the dark based on last year's results.
- b. **A time that might be quieter on the tactical demands of the business.** This is especially important if your business is cyclical. Schedule the planning process a few Chapters after your peak period finishes. Everyone will have had the chance to reset, and you'll have your peak season results and data to inform the next cycle's strategy.

3. Involve the leadership team in the process.

You don't need them to be involved in every detailed workshop, but you should engage them at several crucial points during the process

- a. Before you even start planning, **get them involved in defining the business problem or challenge that needs to be solved by the plan.** If you ask them to explain what is keeping them up at night or preventing them from hitting their numbers (and bonuses 😊) and then tell them you will write a data-backed plan to fix this, you will have their interest – mark my word!
- b. When you have completed your situation assessment, **present them with the juicy Strategic Options and growth opportunities you have uncovered.** Support these opportunities with killer facts and rationale about how attractive they are, so they can't wait to see the strategies & action plan you will construct to realise the growth potential.

4. Ensure your strategy presentation includes specific, measurable objectives that show how much value this plan will add to the business.

What specific revenue, profit, market share or brand asset growth will you deliver? Again, supported with clear and credible rationale as to how you built up these objectives

5. Ensure your strategy is agile with guardrails and contingency in which to flex tactically.

No matter how thorough and foresightful your situation assessment and strategy development is, you will likely get thrown a curveball during the year. Given the swift and sweeping changes we have seen in the last 2 years, I can somewhat understand why your leadership team may be so focused on the short term. But we need to regain a sense of balance between long term business building and short-term reactions. Build a strategically agile plan that considers and builds contingency for the what-ifs so that you can respond quickly

anne@viamarca.com.au

but in an informed, disciplined and thoughtful way.

6. When you deliver results, your leadership team will start to see the value in strategic planning

Once your plan is approved, this is where the rubber hits the road, and you need to deliver against what you promised.

Every time you present a piece of executional activity to the leadership business, reinforce the strategy behind it - every time! Show how your day-to-day actions link back to the strategic plan you have written. Constant reinforcement and repetition of the strategic intent behind the execution will eventually lead to the acceptance and adoption of the principle that 'strategy drives tactics. It will become an expectation and vernacular within the business. When your leadership team or anyone else asks, "what is the strategic intent behind this piece of work?" you know you have succeeded!

Regularly report back to the senior leadership team about how your execution is tracking to the objectives and KPI's you committed to in the plan. **Show how the business results link to the strategic plan and the resource and \$ investment behind it.**

In summary, for your leadership and the broader organisation to understand the value in strategic planning, you need to directly link it to the tactics and actions that deliver the business results.

To achieve this, you should consider adopting the logical and disciplined planning process we have outlined in this guide. One that:

1. Correctly defines your brand and business challenge before you start any work. Clearly demonstrating the problem that your plan will be solving will help establish buy-in and support of the process across the organisation. Show how you will solve their problems!
2. Undertake a thorough situation assessment based on facts and insight to uncover powerful growth opportunities. You can't argue with facts, and if you logically lay out the options and the potential impact they could have on your business, people will want to see how you are going to realise that potential with your strategies
3. Write a plan that sets measurable objectives and actionable strategies to solve your challenge, deliver results and inform your day-to-day actions and decisions. Show exactly how this plan will drive your business, clearly link the strategy to the actual executions and then report the plans progress and impact on results.

Make the Brand Plan process happen

Chapter 10: Implementing a brand planning process in your organisation

Over the last 9 chapters this guide has stepped you through my 3 phase planning process to define your brand challenge, find opportunities to grow and then write an action plan to bring those opportunities to fruition and deliver growth for your brand.



Now you are across the three steps to writing a brand plan and the enormous benefits you will gain from doing so:

- To create direction for your brand, your team and your business.
- To make the day-to-day decision making more effective and purposeful
- And ensure every dollar and minute you spend is allocated to making a difference and driving growth?

It's now time to execute that planning process and this is where I can help you!

If you are a DIY kinda marketer and feel like you can go it alone then I hope this guide has given you some structure and tools to go for it! Enjoy the ride 😊

OR.....

Maybe you'd like someone to help navigate you through the process?
Someone who has done it many times :)

anne@viamarca.com.au

Let me help you make your brand plan process happen. It is a big task and an important one.

Let me facilitate the process for you

If you'd like someone to guide your team through the process and to keep you on track while you still have day-to-day responsibilities. I can customise the approach specifically to suit your business and take the grunt work off your hands so you can give 100% effort to writing the strategy.

I can:

- Brief participants on their role and inputs, book and facilitate engaging, productive workshops that bring cross functional teams together, collaborating to develop consumer-centric but commercially minded plans.
- Bring a fresh perspective to your business and push your thinking to uncover new, actionable insights & opportunities.
- Unlock a full set of tools and workbooks above what I have given you in this guide to drive disciplined & logical thinking. I haven't given away all of my secrets and I will teach you how to use all these tools for future use.
- Share my proven formulas to uncover breakthrough insights, be ruthless with prioritisation & write specific objectives & strategies that will drive growth for your brand and organisation.

If you'd like my help, please send me an email and we can set up a meeting to set out your needs and timings.

And if you've got enough to get yourself started, then let's go! Gather the team, book in the workshops and set the timeline. I'd love to hear about your experience and results as you go. Plus any feedback on this guide is greatly appreciated 😊

Cheers,

A handwritten signature in black ink that reads "Anne Ricci". The signature is written in a cursive, flowing style.