

# FENESTRATION REVIEW ON

CANADA'S WINDOW AND DOOR MAGAZINE

Fall 2016

[fenestrationreview.com](http://fenestrationreview.com)



## SAYING THANK YOU

After 35 years, little things still  
mean a lot at Centennial Windows

WINDOOR PREVIEW - 2017 BUYERS GUIDE



# How to make a marketing plan

by Rich Porayko

**F**ailing to plan is planning to fail. With budget season upon us, this is a great time to look beyond the day to day and capture your vision for 2017 and beyond. If you don't already have a marketing plan, it need not be complicated. Depending on the resources available, an elaborate marketing plan is often not sustainable or achievable. Instead, a working marketing plan can be as simple as a spreadsheet with three tabs for Assumptions, Calendar and Budget. As the years go on, the tabs may expand but with trial and error, the information will only become more refined.

The assumptions tab is your roadmap on where you are going and how you plan on getting there. It covers overall strategic goals including target markets, economic climate, growth expectations, roles and responsibilities, new products, priorities, major projects, training plan and anything else relevant. Thirty-thousand-foot bullet points work best here.

Where assumptions are your strategic plan of attack, the calendar and budget are your ground level, month to month tactical projects and promotions that you plan on using to achieve goals. In a previous life, every time a magazine publisher sales rep would ask if my employer wanted to renew an ad, I would take the request to the sales manager and then the president. We'd discuss the time of year, editorial focus, artwork etc. Do that three or four times a month and you are looking at 36 to 48 ore more discussions each year on ads alone. Plus, creating art was always a scramble and we paid more because we reserved at a one-time rate. On-the-fly marketing wastes time and money.

A better way is to frontload the planning before the beginning of the year. Contact all the trade publications relevant for your market and request a media kit which will have prices, sizes, art requirements and editorial focus. Create a simple calendar table and populate which months have an editorial focus that aligns with your goals. Very quickly, the calendar paints a picture of the forthcoming year. Doing your media planning in advance can also lead to some serious savings. If you

plan on buying three ads in a year, booking the three-times rate will be significantly less than booking three single ads.

Preparing a media calendar will also allow you to create artwork to suite the message you are intending to convey. Rather than whipping something together at the eleventh hour, which is often disruptive and results in substandard quality, pre-booking lets the person responsible see what's coming down the pipeline allowing precious time to prepare rather than having the same discussion dozens of times.

To keep the data organized, I recommend including the costs in the calendar as a working document for the budget. The cells from the calendar can be easily linked to a basic marketing general ledger breakdown in the budget tab. This is handy so if the calendar changes, the budget will be automatically updated eliminating double entry and reducing human error while preserving the backup data.

Having a formal budget creates ownership and will also help prevent budget creep: the seemingly universal practice of random departments thinking it's okay to post expenses to the marketing budget. Employee events are often billed to marketing. Sounds petty, however this practice overstates expenses for one department and understates it for another. Pretty soon, no one trusts the data.

After completing the calendar and budget tabs, update assumptions with a concise summary of the two tabs. Now is the time to present to any stakeholders and get buy in. Tough decisions will need to be made and items may be officially approved, tentatively approved, parked or deleted. Note, tentative approval should be the exception rather than the rule. Approving, parking or deleting a project is definitive. Tentative is unclear, requires follow up meetings and the project risks the dreaded paralysis by analysis. Keep tentative approvals to a minimum.

Do or do not do, there is no try. A marketing plan that is not formally approved or actioned is not worth the data on your hard drive.

The marketing plan is a living document and if properly nurtured, will constantly improve.