Communications Planning Guide

As you map out your communications strategy, use this template to help you:

* Determine the appropriate set of communication activities based on the relationships among the communication, buying, and selling processes.
* Outline the use of messages and other communication tools throughout your selling process.
* Determine the appropriate communication vehicles you should implement for each audience, whether that audience is a customer, a channel member, or a partner.
* Determine implementation timing and the budget for each audience.

Create a new planning guide for each of your target audiences.

To insert the appropriate information for your plan, click a word enclosed in brackets and then type the correct information, such as the name of the audience or the name of your company.

## Communications plan for

* + 1. **Communication, buying, and selling processes**

The following diagram depicts the relationships among the communication, buying, and selling processes used with and by . In the row beginning with “Awareness,” the communication process outlines the key communication objectives that must be met to facilitate progress in the buying and selling processes.

You might need to modify the buying or selling process to reflect your company’s or your audience’s process.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication process** | | | | | | | | | | | |
| Awareness | | Credibility | | | | Interest | | Preference | | Selection | Loyalty |
|  | Lead generation | | | | |
|  |  | | | | |  | |  | |  |  |
| **Buying process** | | | | | | | | | | | |
| Identify the need | | Identify alternative sources | | Evaluate alternative sources | | | Select a short list of alternatives | | Conduct a technical evaluation | Purchase | Renewal |
|  | |  | |  | | |  | |  |  |  |
| **Sales process** | | | | | | | | | | | |
|  | Identify opportunity | | Qualify opportunity | | Plan the solution | | Propose the solution | | Provide due diligence | Close sale | Manage the account |

* + 1. **Communication process and the evolution of messaging**

As your company moves through the communication process, you must evolve your messages to map to the information requirements of your audience. In general, as you move through the communication process, your messages should provide more detail and substantiation about your business and products. Understanding the messages that are required to support the later stages of the buying and selling processes makes it possible for you to create better messages in the earlier stages of the process. The following table summarizes how and when you can evolve the essence, or the net “takeaway,” from your messages.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication process—net takeaway from messages** | | | | | | | | | | | | | |
| Awareness | | Credibility | | | | Interest | | Preference | | | Selection | Loyalty | |
|  | Lead generation | | | | |
|  |  | | | | |  | |  | | |  |  | |
| is in the business. | | | | | |  | |  | | |  |  | |
|  |  | | | | |  | |  | | |  |  | |
|  | ’s business is validated by the industry and your customers. | | | | |  | |  | | |  |  | |
|  |  | | | | |  | |  | | |  |  | |
|  |  | | | | | has a vision for and commitment to the business. | | | |  |  |  | |
|  |  | | | | |  | | | | |  |  | |
|  |  | | | | | has specific offerings and capabilities that meet customers’ specific needs. | | | | |  |  | |
|  |  | | | | |  | |  | | |  |  | |
|  |  | | | | |  | | has strong capabilities that make it competitive in the business. | | |  |  | |
|  |  | | | | |  | |  | | |  |  | |
|  |  | | | | |  | |  | | | You made the right choice in selecting . | |  |
|  |  | | | | |  | |  | | |  |  | |
|  |  | | | | |  | |  | | |  | delivered on its promise. | |
|  |  | | | | |  | |  | | |  |  | |
| **buying process** | | | | | | | | | | | | | |
| Identify the need | | Identify alternative sources | | Evaluate alternative sources | | | Select a short list of alternatives | | Conduct a technical evaluation | | Purchase | Renewal | |
|  | |  | |  | | |  | |  | |  |  | |
| **sales process** | | | | | | | | | | | | | |
|  | Identify opportunity | | Qualify opportunity | | Plan the solution | | Propose the solution | | Provide due diligence | | Close sale | Manage the account | |

* + 1. **Communication vehicle options**

The types of communication vehicles that you use to support different stages of the buying and selling processes are dictated by the corresponding communication objectives. In the row beginning with “Awareness,” the following table outlines the key communication vehicles that support each communication objective. Not all communication vehicles are required for you to relay your message to the market effectively. Use the Target Audience Profiling Questionnaire to understand fully how your audience finds information and to select the most appropriate communication vehicles based on your audience’s preferred sources for information.

In conjunction with the preceding table, which outlines the evolution of messaging throughout the communication process, marketing communications specialists can use the following table to determine how best to focus messages in each communication vehicle.

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| **Communication process—sample communication vehicles** | | | | | |
| Awareness | Credibility | Interest | Preference | Selection | Loyalty |
| Press briefing or tour, or both | Press mentions | Business white papers | Data sheets and other detailed product collateral | Proposal templates, invoices, and other company documents | “Thank you” and “just checking in” communications by e-mail, regular mail, phone, or other modes |
| Press releases and associated materials | Analyst quotes, references, and mentions | Press articles | Feature and functionality presentations, videos, and other types of demonstrations | Customer references | Internet marketing |
| Analyst briefing or tour, or both | Customer and partner quotes and references | Analyst papers and presentations | Printed customer success stories | E-commerce Web site |  |
| Company informational Web site | Company or product overview collateral | Conference speaker presentations | Capabilities brochure |  |  |
| Industry event trade show floor participation | Company or product overview slide presentation | Competitive positioning advertising | Return on investment (ROI) tools |  |  |
| Awareness advertising | Product overview demonstration on Web | Direct marketing | Technical white papers |  |  |
| Public relations | Press and analyst article reprints | Internet marketing | Direct-response advertising |  |  |
| Internet marketing |  |  | Direct marketing |  |  |

* + 1. **Communication vehicles selection for**

Use the Target Audience Profiling Questionnaire to get a detailed breakdown of your audience’s demographics and psychographics. This will help you understand how your audience finds information, and it will help you select the most appropriate communication vehicles based on your audience’s preferred sources for information.

In the following table, for each communication objective listed in the row starting with “Awareness,” list the communication vehicles that are most appropriate for your audience. By assigning vehicles to communication objectives, you get a sense of the timing and order in which you should implement your communication vehicles.

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| --- | --- | --- | --- | --- | --- |
| **Communication process—communication vehicles for** | | | | | |
| Awareness | Credibility | Interest | Preference | Selection | Loyalty |
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* + 1. **Communication vehicles tactical calendar for**

In the following table, list all your communication vehicles in the first column. Add rows if necessary. Change the month headings to correspond to actual month names. Place an “X” in the column for the month in which you want the communication vehicle to be delivered to your audience. In most cases, the delivery month will be different from the production month, which you’ll need for step 6.

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| --- | --- | --- | --- | --- | --- |
| **Communications vehicle tactical calendar for** | | | | | |
| Vehicle |  |  |  |  |  |
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* + 1. **Communication vehicles budget for**

In the following table, list all your communication vehicles in the first column. Add rows if necessary. Change the month headings to correspond to actual month names. Place the cost of each vehicle in the month during which you expect to pay the expenses for production of that vehicle. Total each column to determine your monthly budget. Note that for some vehicles, production will take more than one month, and in many cases installment payments will be required over a series of months.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Communications vehicle budget for** | | | | | |
| Vehicle |  |  |  |  |  |
|  | $ | $ | $ | $ | $ |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| **Total $** | **$** | **$** | **$** | **$** | **$** |

Repeat the preceding six steps for each additional audience.