

HOW TO BUILD THE MARKETING PLAN OF A GROUP



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There is a lot of literature on how to develop a marketing plan. But there is little when it comes to writing a plan at the level of a group or at the level of a business unit (BU). Often used improperly, the term « plan » can be mixed with other « corporate » jargon, such as vision, ambition, or strategy. One can also wonder how to develop a group-wide marketing plan when the core business of every BU's is so different from others; sometimes even mixing B2B with B2C activities within the same group. Also, the positioning of the headquarters' (HQ) marketing team (when there is one) and the level of centralization, determine the tools available to the subsidiaries, their internal customers.

This white paper aims at clarifying the way a marketing plan is built, and at providing with a methodology.

Question of jargon

There are several definitions of what a plan is, and this multiplicity can lead to potential confusion. In this white paper, the following definitions have been agreed upon, by choice.

Purpose



Reason of being of the company

- Why was the company created? What does she want to do?
- Elements: for whom, what value proposition, what impact
- The purpose is public, known to everyone, internally and externally
- 🌐 the whole company / the whole group
- ⌚ doesn't change over time

Values



What will guide the company, principles at the origin of choices and actions

- What's right and good? With what principles to act?
- Elements: beliefs, principles, attitudes
- Values support the company's purpose
- Values are often public, but not always
- 🌐 the whole company / the whole group
- ⌚ doesn't change over time

Vision



Direction, desired future state of the company

- Where are we going? What do we want the company to become in x years?
- Elements: at least the purpose
- The vision is based the purpose and can be written only when the purpose is clear
- The vision is not public; it is known internally, not externally
- 🌐 the whole company / the whole group
- ⌚ can evolve over time when the context evolves, but always based on the purpose

Strategy 	<p>How the company will move towards the vision, high-level action plan Mandatory - never optional</p> <ul style="list-style-type: none"> - How to achieve the vision in the next few years? - Format: description of high-level axes that define the path to vision - The strategy can only be written when knowing the vision - 🌐 the whole company / the whole group, or at the level of a BU - 🕒 to renew periodically, often every 3 to 5 years
Ambition 	<p>High-level numbered action plan</p> <ul style="list-style-type: none"> - How much are we going to reach? What investment is needed to achieve this? - Elements: goals, actions, resources - Ambition is a numbered variation of the strategy - 🌐 cf. strategy - 🕒 cf. strategy
Plan 	<p>Details actions to be taken</p> <ul style="list-style-type: none"> - What actions? What performance indicators? - Elements: actions (SMART), milestones / planning, KPI, resources - The plan can only be written once the ambition has been finalized - 🌐 by function (marketing, finance, etc.), by BU, by subsidiary, by region, etc. - 🕒 1 to 3 years, renewable on a yearly basis

In a more visual way, here is the interdependence of the concepts.



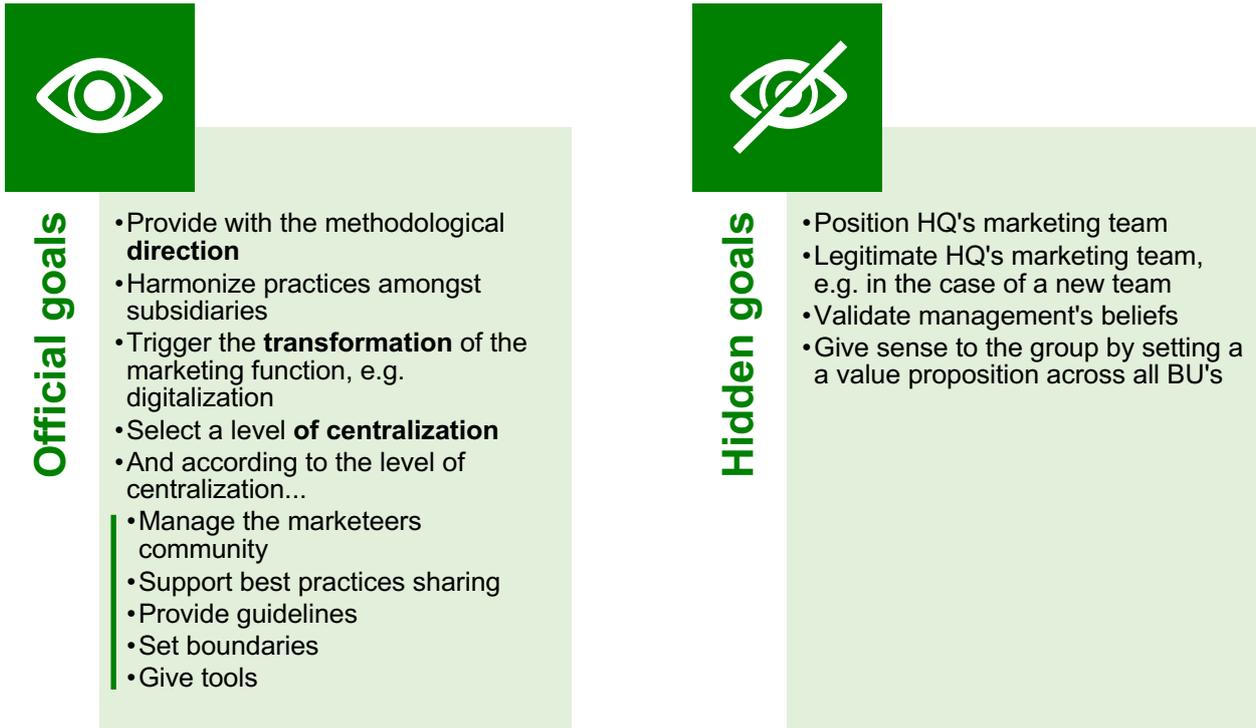
A plan is therefore the most specific and the most pragmatic piece.

Official goals and hidden goals

The building of a group-level plan for the marketing function is not always straightforward. In some groups, there is only limited interest. In others, it is written, but at another, the level of a BU, where the offer is more homogeneous.

A marketing plan must meet clear and obvious objectives. And because the company is run by human beings, it also meets irrational or even hidden objectives.

These hidden goals are not to be overlooked.



Amongst the objectives, there is level of centralization for the marketing function. The different levels of centralization are described in the following article [Renforcer les départements d'un siège : comment en faire une opportunité ?¹](#). In function of the level of centralization chosen, some usages are most appropriate.

Groups marketing plan vs. subsidiaries' marketing plans

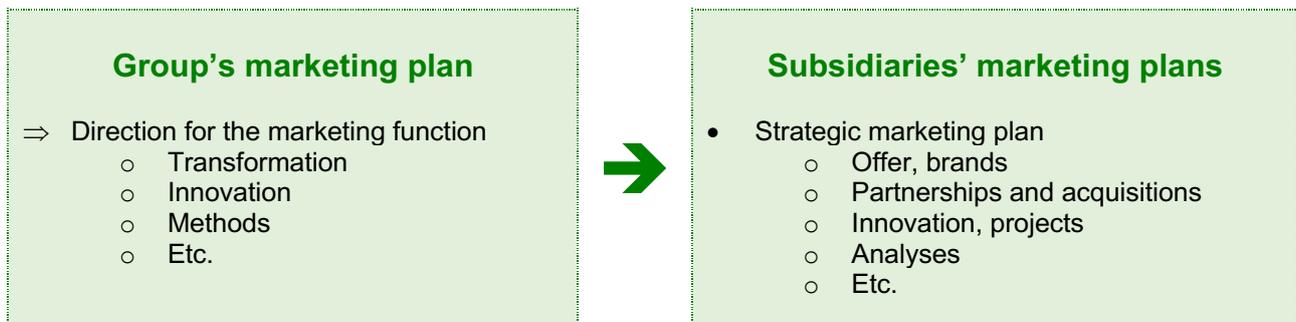
The group's marketing plan is different from the marketing plans of the subsidiaries.

One induces the others

The group's marketing plan must be built ahead of the subsidiaries' marketing plans. It should inspire and guide the subsidiaries. Therefore, the group's marketing plan must be cover period of time that is greater than the one of the subsidiaries'.

The nature of the content differs

Below are some elements of the two types of plans, highlighting the differences in nature.



¹ [Renforcer les départements d'un siège : comment en faire une opportunité ?](#), Les Échos, Delphine Fondu, April 2019

- **Support to subsidiaries**
Depending on the level of centralization
 - Community animation
 - Knowledge sharing
 - Guidelines
 - Tools
 - Etc.
- **Strategic and operational plans for centrally managed elements**
 - Key accounts / multi-subsiary clients
 - Shared tools
 - General contents
 - Global partnerships and acquisitions
 - Etc.

- **Operational marketing plan**
 - User experience
 - Lead management, CRM, loyalty
 - Content
 - Communication, plan media
 - Etc.
- **Resources (human, financial, IT)**



- The group's marketing plan should not go into such a deep level of details that it replaces the marketing plans of the subsidiaries.
- The marketing plans of the subsidiaries must be aligned with the group's marketing plan.

How to proceed?



Top-down or bottom-up?

Purists say the way to go is to start from the group's strategy, identify the marketing topics, and then draw the headlines of the group's marketing plan. Others build the group's marketing plan by synthesizing the points that are important in the mind of the VP of marketing or the CEO. And yet, others take the current projects lists and bind them. Fact is, everyone has a compelling approach. Ideally, a combination of those 3 approaches is the best way to go. But one thing is for sure, it is a « corporate » plan, and it is necessary to add « marketing techniques ».

💬 Tips & Tricks
To select an approach, do not hesitate to start bottom-up, then validate with stakeholders and finally link with the strategy



To do list ahead

The quality of the plan can be improved by conducting some analyses ahead:

- Competitors' benchmark
- Market trends
- VOC - Qualitative and quantitative customers' needs
- Return on experience on past actions



Methodology

Despite all that is written above, the secret lies in a good communication with the group's management team, the BU and the subsidiaries. Writing such a plan can only be done in an iterative way by exchanging a lot, and with a lot of people.

💬 Tips & Tricks
Move forward in an iterative mode and validate with a stakeholder on every iteration

4

Validation

Crucial step in the planning process, getting the buy-in of a group marketing plan is done by improving the plan with the value input of everyone. It is possible to move forward, e.g. from the most operational person to the most conceptual person, or bottom-up in the organization.

Format

The plan's **level of detail** must be consistent with the company's practices. It must also comply with the ways of working of the person who is going to carry it. Some companies even go so far as imposing a frame.

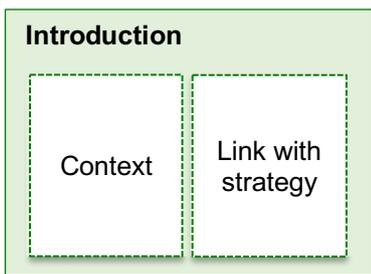
Similarly, some companies include **budget request** in the plan, while others do so in a separate process. Budget included or not, the term of the plan goes with the fiscal year.

Here is an example of the overall structure of the plan.

Introduction

The introduction should be brief, and it should encompass at least:

- Context
- Link with strategy



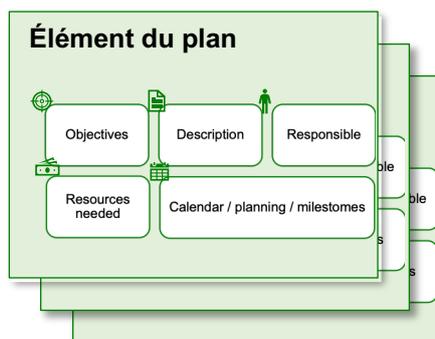
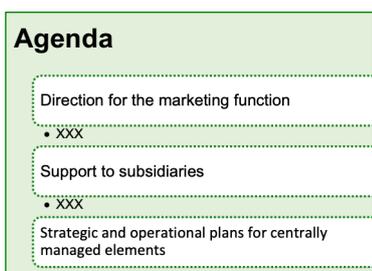
Body of the plan: the elements of the plan

The elements of the plan must reflect the positioning of HQ's marketing team. For example, if the central team is positioned essentially on transformation topics, the plan should cover only transformation actions.

The example below shows a hypothetical exhaustive structure.

- ⇒ Direction for the marketing function
- ⇒ Support to subsidiaries
- ⇒ Strategic and operational plans for centrally managed elements

There will be a description for each element of the plan: objectives, tasks description, responsible, calendar / planning / milestones, resources needed.



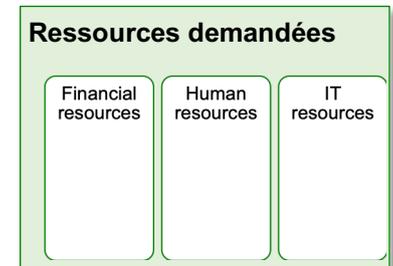
🗨️ 1 year, 2 years, 3 years, what horizon?

The duration of the plan depends on the sector. In a highly competitive or changing rapidly sector, it is best to go for a shorter term. In some cases, when the environment is very very dynamic, even 1 year may seem unrealistic. In less dynamic sectors, it is possible to go up to 3 years, but rarely more.

Resources (optional)

At the end, a recap of the resources requested is good to prepare to the budget process.

- Financial
- Human
- IT



Appendix

In the appendix section, it is possible to add the analyses conducted ahead of the planning process. Those can help explaining some of the decisions made to build the plan (see above – competitors' benchmark, market trends, VOC - qualitative and quantitative customers' needs, return on experience on past actions), or any other relevant element to the plan.

🗨️ B2B vs. B2C

How does a B2B group marketing plan differ from a B2C plan, knowing that B2B and B2C can co-exist in a same group? They don't differ! The objectives, the method and the structure at the group level remain the same. Beware, the marketing plans of the subsidiaries do differ in a B2B from a B2C environment.

Conclusion

Finally, and after describing what a group marketing plan is, its structure, the methodology to build it, one can imagine that by extrapolation, all this also could apply to finance, HR, IT group plans.

The author



With more than 20 years in an international environment, in both B2B2C and B2B, Delphine helps the management of large groups in declining their marketing strategy to all entities. Her marketing experience includes, amongst other things, structuring complex programs at the group level, designing and launching new international offers, organizing expertise transfer in the context of transformation (digital ... or not), shaping an ecosystem that drives innovation, digitalizing marketing, and developing group marketing plans.

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