SEO Consulting

6 Steps to Compiling an Integrated Online Marketing Strategy

February 24, 2014

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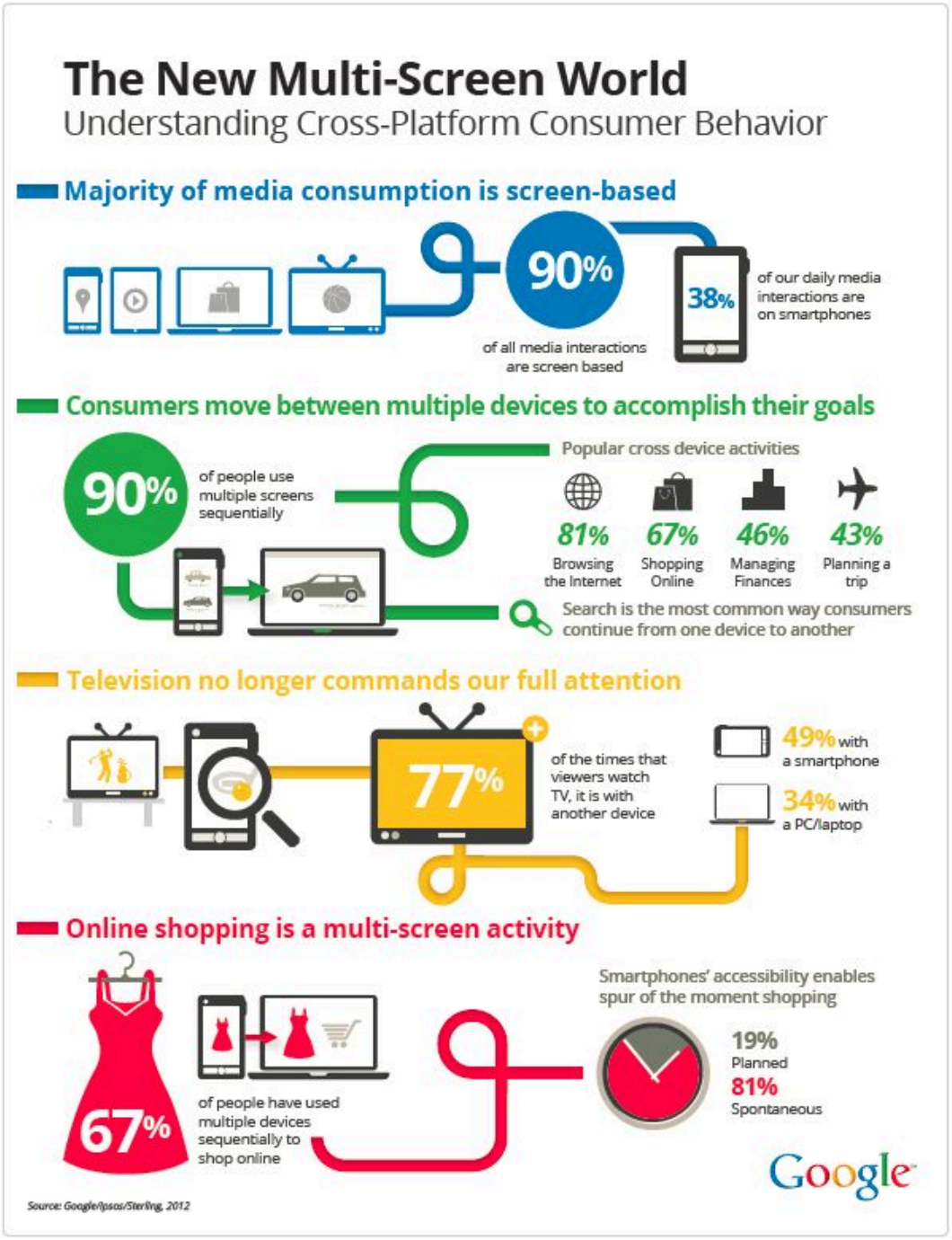
The online marketing community is often abuzz with excitement whenever we discuss the latest trends within our industry, such as omni-channel marketing, new and clever ways to leverage mobile, or the advent of changes in user behavior such as multi-touch/multi-devices. We all want to be on the cutting edge of technology/innovation and no one wants to feel as if they're lagging behind. Unfortunately the reality is there are hard resource constraints we all face, whether it be time or money. Simply put, no one has time to do it all. The real obstacle we all face is how do we prioritize any online marketing activity in a world that constantly demands more? How do we develop a consistent and integrated framework/workflow process in an increasingly complex ecosystem?



These are the challenges that, as marketers, we are all facing. Coming from an agency background, I can completely relate to the feeling that the right approach is to do more (offer more marketing channels/provide more specializations). Having worked on a variety of clients stemming from diverse backgrounds, whether it be huge enterprises, VC-backed start-ups that have to provide monthly reports to their board, or working within a heavily regulated industry,

it doesn't seem like anyone is looking for more options. Too often this results in scope creep, extended timelines, and going massively over-budget. In actuality, most of us are looking for a simplified approach and a means of appropriately prioritizing the right activities in an industry that wants to pull everyone in too many directions.

Some of the biggest wins I've gotten for my clients was when I took a step back and focused on the fundamentals, like what goals should be targeting and how can we develop proper reporting to gain attribution for our work, where are we being inefficient with our existing resources and how can we streamline the existing workflow process, and how can we do more of what we're doing right? In order to be successful, it's not about doing more work, it's about doing more of the *right* type of work. **The purpose of this post is to help marketers determine how to start and execute an integrated online marketing strategy - how to simplify the process and make sure you're prioritizing the right type of activities to help you meet your overarching marketing objectives**.

Step 1: Ask the right questions

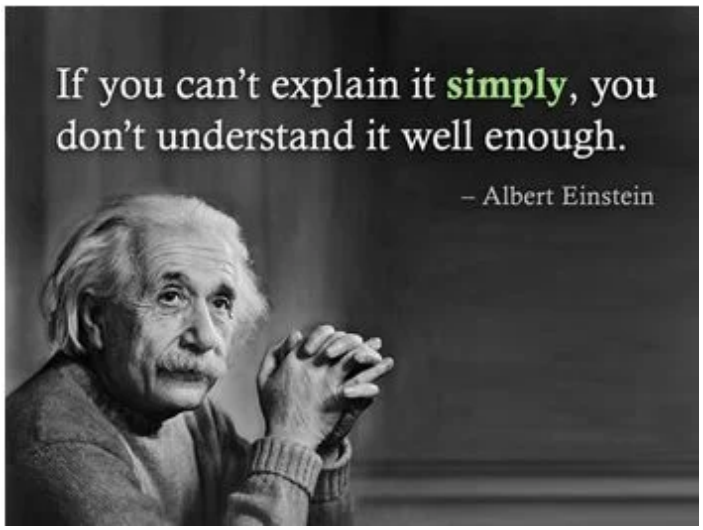
(Gain an in-depth understanding of how marketing fits within the organization)

This is the most important step when developing an integrated online marketing strategy and plan. Without a clear and in-depth understanding of why marketing is important for the business, it's nearly impossible to prioritize the different marketing activities and

determine whether or not you've hit and/or exceeded meaningful goals for the organization. Depending on the type of business and where the business is at, there are different functions for marketing. Is the goal building brand awareness, developing product awareness, creating product market fit, increase in visibility, or is it another means of lead generation/revenue generation?

At Distilled, we've determined that the best way to gain clarity on the goals of an organization is to undergo a discovery phase. We've established this discovery phase based on our previous experience working with clients where we executed marketing strategies and reported on KPIs that we later discovered were not as meaningful to key stakeholders as we had anticipated.

Depending on the client, I have sat down with the VP of sales, head of product, head of events, the CTO, the CFO, head of marketing, and account managers to gain an in-depth understanding of their priorities and their pain points. Ultimately, in order to focus on the right type of marketing activities, we need a 360-degree view of what would have the most impact to the business from different perspectives.



Sample questions:

High-level financial perspective (for CEOs/CFO/high-level directors)

- Is the company self-funded or VC-backed?
  - What implications does this have on our engagement together or the financial milestones we want to hit over the next 12-24 months?
- Is the company profitable and, if so, how long has it been profitable?
- What is the company's annual revenue?

High-level business perspective (for CEOs/CFO/high-level directors)

- What is the business's unique value proposition?
- What are the overall business goals and objectives that we want to hit over the next 12-24 months?
- What are the overall infrastructure and resources that would be required to hit these goals?

High-level growth perspective (for CEOs/CFO/high-level directors)

- How does your company set goals and strategy around growth, expansion, and optimization of your business? Who dos this and how often do you revisit it? Who sits in on this conversations from the marketing department?
- How does your business determine how much money each year is invested into the growth/expansion of the business?

- Has the amount you've invested into growth fluctuated over the years or has it stayed consistent? Why?
- How much of your marketing budget do you invest into offline vs online per year? Why? Has the amount fluctuated much year to year and if so, what do you attribute the fluctuation to be due to?

VP of sales

- Discuss what the normal sales cycle looks like
- Discuss who on the sales team has the deepest understanding of the product and customer needs
- Discuss main objectives the sales team has when making a sale and how they qualify a lead
- Discuss trends and demands of products/services
- Discuss strategic partnerships the company has and creative ways to leverage them

Head of marketing

- Review marketing team roles, KPIs, and get a better understanding of the roles the team is currently hiring for
- Overview of different digital marketing channels, activity performed over time across these channels, and overall market performance
- Discussion of overarching marketing objectives/goals and the opportunities for growth
- Are there marketing channels you are currently not investing into that you want to be investing into? What's kept you from

investing in those channels to date?

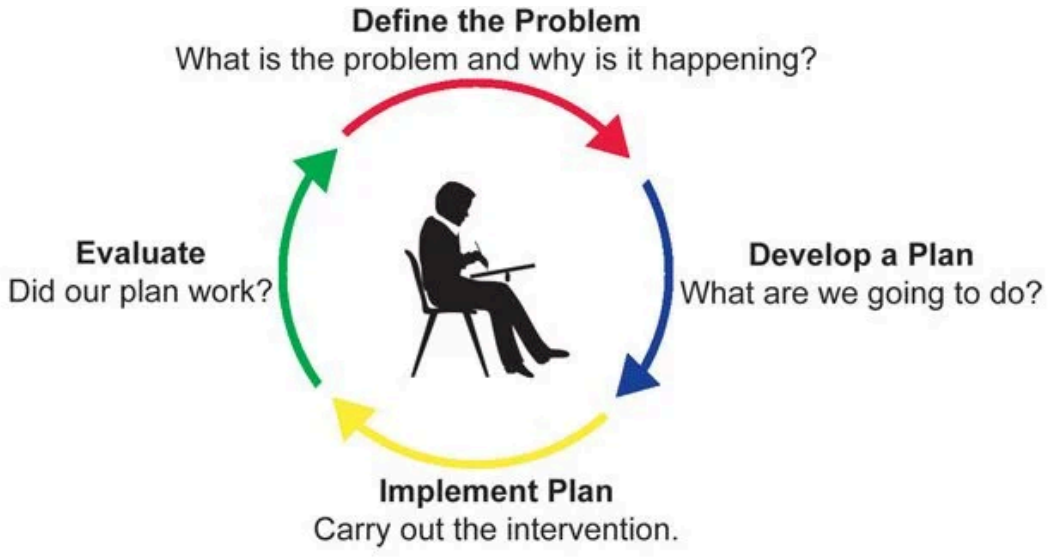
- What are your highest margin products/services? What are the lowest?
- What are the products/services that attribute to the largest revenue drivers for the business?
- Do you have any new products/services that you are trying to bring to market? Why?
- What are the challenges/opportunities you see in bringing this new product/service to market?

Step 2: Identify the problem statement and the meaningful goal(s) the marketing team can/wants to impact

Once we have an in-depth understanding of the client's, department's or businesses's overarching goals and objectives, we should then be able to explicitly identify the problem the organization is facing, as well as the meaningful goals we can and want to impact. It's important to make sure that we aren't spreading ourselves too thin by trying to accomplish/impact too many goals/objectives, but sticking to the ones that would be most meaningful to the overall business based on the information we received from step 1.

For this specific post, I'm going to provide a sample scenario to make this entire process a little more concrete. Let's say, hypothetically, I have identified that the problem is a successful organization wants to enter into the online marketing realm, but

doesn't know where to begin. However, we do know that the immediate and most meaningful goal for the client's overall business would be to increase the number of leads the company receives. This specific objective is one I've commonly come across with either B2B companies or any service-oriented organizations (like agencies or firms).



To put it succinctly, the problem statement for the organization would look something like this:

Problem statement:

"In order to continue the company's current 5-year trajectory, the organization needs to discover other methods of garnering leads to support the company's growing market share. These channels need to (1) be effective in targeting the company's core audience of small and medium sized businesses (generally less than 200 employees) (2) become an effective framework for ensuring that these channels have the potential to generate good leads for the company's sales force and (3) that we are consistently aware of the need to develop

mechanisms for reporting, so that the organization as a whole has a deeper understanding of how much budget they should be allocating to which departments in the future."

The sample goals for such an organization that would help support the problem statement could be:

- Specify the appropriate marketing channels/platforms that will help the company increase the number of leads generated.
- Once we have identified these channels and launched campaigns on these platforms, we will need a process to put together stretch growth projections.
- Once we have met these stretch growth projections, we need to establish a very clear framework of what resources it would take to continue investing in these channels.

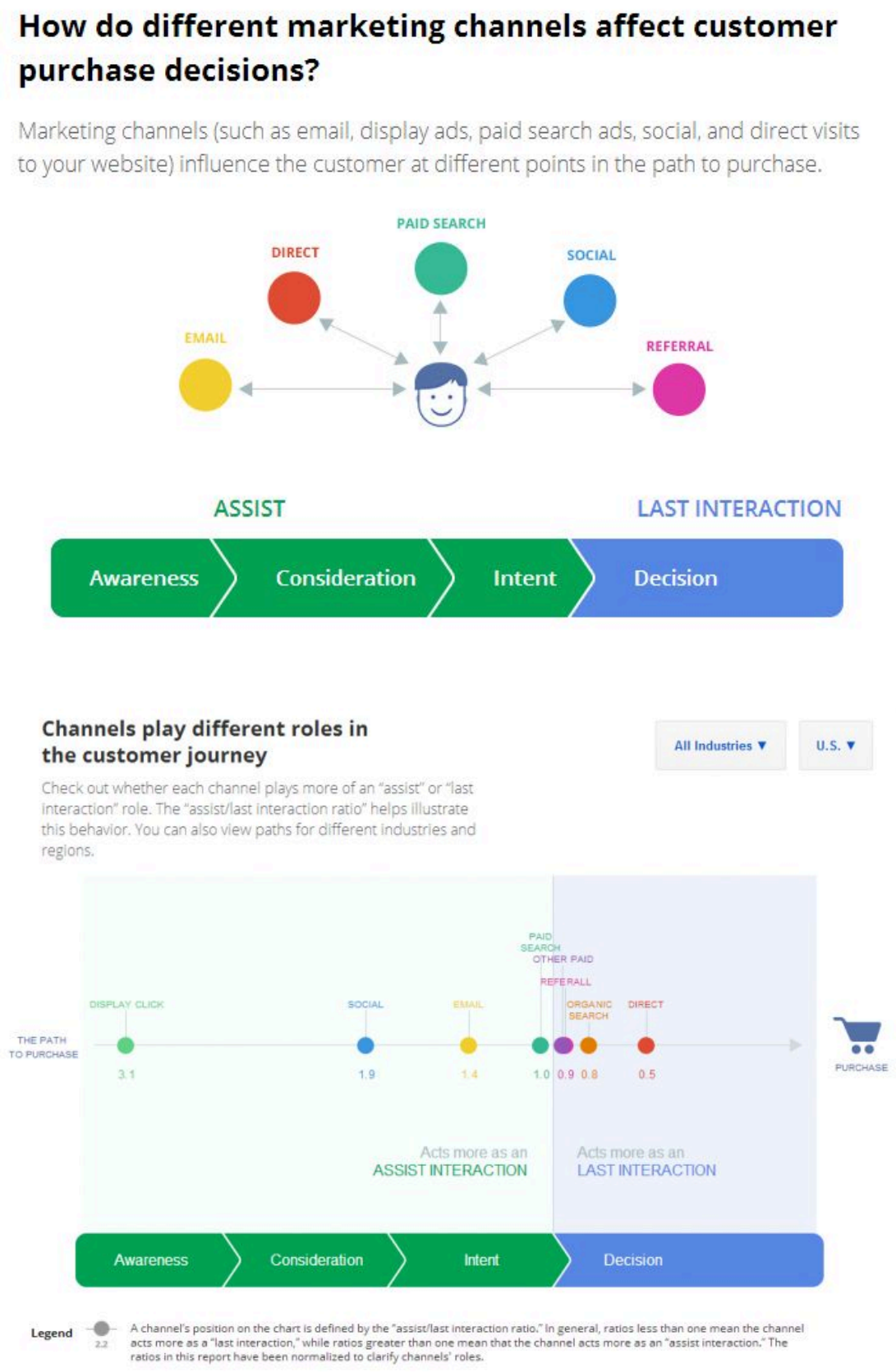
Most of the organizations you're currently working with have previously invested into different online marketing channels. As a result, the goals for your organization may distinctly differ from the ones listed above. In situations where a company has previously invested into online marketing, before you establish concrete goals for the organization, you should first analyze the performance of these channels and identify areas that can be used to improve its performance , such as improving the integration between different marketing channels, identifying methodologies to improve the conversion rates of those channels, or having stretch goals we want these channels to meet.

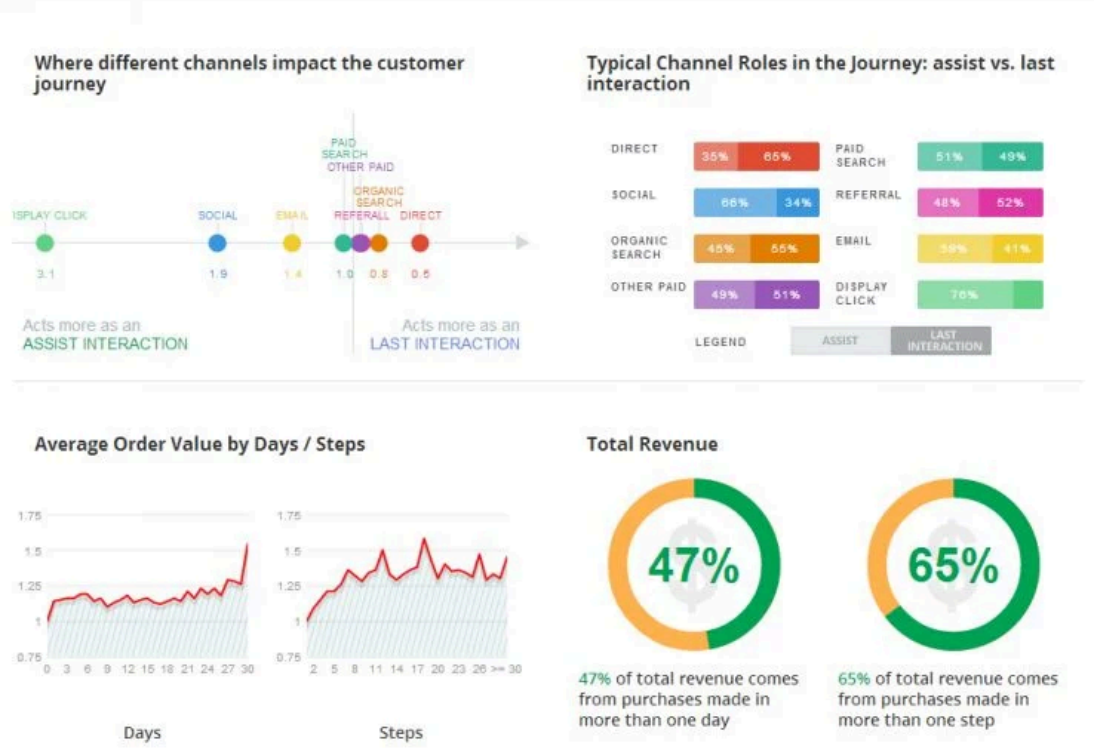
Step 3: Develop a methodology for identifying the appropriate marketing channels/activities to invest in

The next step to develop an integrated online marketing strategy/plan to determine the appropriate channels to invest in based on the overall problem statement and the already established goals/objectives. For instance, in the example scenario established above, we've already deemed that our primary goal would be to increase the number of leads generated. Based on the fact that our sample has no clear foundation in online marketing, it would **seem unwise to invest too heavily at the beginning on online marketing activities that don't establish a clear feedback loop**. In addition, because of the company doesn't have an understanding of what are the key metrics they need to hit, we need marketing activities that help us establish a strong foundation for reporting.

As a result, for a company such as the one mentioned above, I would start off investing more heavily in paid channels, such as paid search, display advertising/retargeting, and possibly the development of affiliate advertising. Based on the successful launch of these channels, the goal is that overtime, we would develop an understanding of the core audience we want to target, the type of copy that would resonate with this audience, as well as which type of keywords that would convert best. This is not to undermine the long-term benefits of more inbound channels, like content strategy and SEO, but at this point in the company's online marketing

strategy/plan, we simply don't have the immediate resources to invest and prioritize heavily in these channels.





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That being said, understanding the type of ad copy and keywords that perform well in paid channels is a really important finding for the company's potential future work in other marketing activities, such as SEO and content strategy without needing these type of channels to complete redundant work. **Understanding the type of marketing findings from a particular marketing activity that are fundamentally important to other marketing channels is the beginning stages of developing a cohesive integrated marketing campaign.**

Step 4: Develop core objectives for the specific channels we would invest in

Once we've identified the specific marketing channels we want to be investing in and our goals, we want to outline some very core objectives that we want to achieve for each of these channels. This will be instrumental in helping the individuals who are responsible for execution to develop a strategy that will help support the overarching objectives.

Example goal: Launch the company's paid search account

For Q1, our objectives for the account might be to:

Objective 1: Gain an understanding of the type of ad copy, keywords, and landing pages that have successfully worked for your competitors

Objective 2: Put together a clear keyword hierarchy, ad copy tests, landing page tests, and overall bidding strategy for the paid search account

For Q2, our objectives for the account might be to:

Objective 1: Based on the re-launch of the paid search account, set and meet specific targets for budget and CTR/CPA goals in Q2. Since we're just starting the account and don't have a clear understanding of an ideal CPA or even the lifetime value of a customer, we are going to use generic targets for our initial foundation.

These would include:

- Meet the industry standard of achieving a 1% CTR
- In terms of cost per acquisition, given the simplified formula that CPA = total cost/number of conversions, we'll put together the

initial goals as:

- First goal is to hit breakeven point
- After achieving this first goal, the second might be to increase the profitability of conversions
- If we achieve the second goal, our third goal is to determine how to increase the amount of budget going to these channels without affecting overall profitability.

For Q3, our objectives for the paid search account might be to:

Objective 1: Review initial targets and determine:

- **If we met these targets, the creation of new stretch targets.**
- **If we didn't meet these initial targets, develop a clear understanding of what it would take to meet these stretch targets and execute upon the strategy.**

Step 5: Put together a brief and an efficient/integrated workflow process for marketing activities

One of the most important takeaways I've learned when developing and executing an integrated marketing campaign is the **value of putting together an extremely clear brief.** Writing a concise, well-thought out, and clear brief is challenging, but proactively putting one together will ultimately save everyone money and time. A clear brief makes it explicitly clear whether or not the outcome met the overall objective and if an activity/channel was successful or not. This is especially important when a marketing manager/director is

juggling multiple balls in the air and can't manage the day-to-day execution of these activities.

Below is a fantastic video from The Skool Rocks that describes in-depth what makes a great brief, how to use it, and how to develop a brief for different audiences, such as internal teams and designers vs. developers. The audience for The Skool is targeted towards creatives and web designers, but this video has tons of key takeaways that are also directly applicable for online marketers.

Once the brief has been put together, it's important to work with the team to develop a very efficient/integrated workflow process to execute upon these marketing activities. Having a clear understanding of the specific activities and in what order they will be executed upon to meet clearly defined goals gets everyone on the same page. A carefully thought out workflow will eliminate any confusion, will take into account the different dependencies and when certain individuals should be checking in/having meetings with different departments, and have carefully set expectations for communication and meeting deadlines.

For instance, if the site needs to create new landing pages, the ideal scenario would be for the paid search/SEO/content/brand teams to work together to prioritize the overall layout and copy of the page. Otherwise, having the paid search team create PPC landing pages, then the SEO team create another set of landing pages, while the content team creates a third set of landing pages can be deemed overly redundant, which can lead to massive inconsistencies and scalability issues that may pop up on the site. That being said, there are clearly scenarios of which it is necessary for different sets of landing pages to be generated. The overall goal is of course, to reduce redundancy whenever possible.

Step 6: Report and reassess results and then expand or reallocate resources as needed

Once different marketing channels/platforms have been launched and there is ample data to be analyzed and reported on, it's important to reassess this information and determine whether the channel/activity has adequately performed and more importantly, **if the channel has potential to grow given its existing performance**. It's also important to consistently and strategically evaluate whether given the overarching business goals/objectives for the organization if budget and resources have been adequately allocated. If not, we need to determine whether any of it needs to be reallocated or further developed (example: making hiring decisions).

At the same time, it's also important to **reevaluate when it is appropriate to start initiating other marketing activities/platforms that have previously not been as big of a priority and how to properly integrate existing marketing activities with these new channels to ensure there is little to no redundancy taking place across platforms**. One other aspect to consider is to determine whether the incorporation of other tools/resources will make the entire process more efficient.

Ultimately, compiling an integrated online marketing strategy/plan can definitely be overwhelming, especially given the wide-range of different platforms/channels that currently exist within our industry (not to mention the continuous technological advancements that increase the number of platforms/tools that are available). It's important to develop a framework that ensures the resources (such as time, money, head space of individuals) is focused on the right set of activities that will help support the company's overall business vision, goals, and objectives. This type of framework is initially time-

consuming, but in the long run, can save a lot of confusion, when the complexities within an organization's marketing team increase. Having very clear objectives of why you're investing in a specific channel and for what specific purpose not only aids with reporting, but also ensures that everyone on the team (both internal and external resources) have a clear understanding of appropriate targets.

As the ecosystem of our industry becomes ever more complex, establishing a very clear framework for how to simplify the process and execute on the important marketing activities becomes increasingly more important. As marketers, let's embrace these new challenges and begin the process together. There's no better time than the present.

The author's views are entirely their own (excluding the unlikely event of hypnosis) and may not always reflect the views of Moz.

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