



## Three Pivotal Steps to Follow When Developing a Marketing Campaign

By Laura Patterson, President

If you're like many of our customers, you're in the thick of executing a plethora of various marketing campaigns at once. Often, these campaigns entail a number of moving parts, from different forms of content to a variety of selling channels. At a recent event where I was discussing best practices for measuring Marketing, one of the participants ask for a list of metrics he could use to measure campaign performance. This is when I realize that some people believe there is a specific list of [measures and metrics](#) everyone can employ.

So, I responded to *his* questions with some follow-up questions of my own.

1. Do each of your campaigns connect directly to a specific [business outcome](#)?
2. Do you have a specified performance target for each campaign related to the corresponding outcome?



The majority of companies run campaigns that are tied to either generating leads or inquiries, but oftentimes lack any specific performance targets. Let's delve a little deeper into the issue by considering the following: does it matter how many leads are generated for a given target in "x" time frame, for "y" product, with "z" rate of conversion to deals won?

If you don't know what you're aiming at, how can you measure whether you hit it or not? Just as a pilot works through a preflight checklist before departure, every marketer should follow three steps when developing and executing a marketing campaign:

### 1. Know Where You're Aiming

I've yet to meet a Marketing organization with unlimited resources. Therefore, every campaign must serve a well-defined specific purpose that will positively impact the business. Before you create a campaign, you must know what the campaign is expected to impact and how this impact will be measured. Avoid executing any campaigns if the business outcome isn't clear. Initiate a conversation with the appropriate people to find out, or collaboratively establish the business outcome.



### 2. Establish Performance Targets Before You Fire

Armed with a solid business outcome, your next step is to set each campaign's [performance target](#)—a specific goal the campaign will achieve within a specified time frame.

Executing on time and within (or under) budget is *not* the performance target. Rather, establish relevant and measurable performance targets that relate to the business needle you are trying to move. For example, if the desired business outcome is related to acquiring a specific set of customers in a new market or expanding the share of wallet among a particular customer segment, your performance targets for the program (depending on what it is and where in the buying cycle it is being deployed) may consist of a certain number of inquiries, appointments, or even quote requests.

Whatever the performance target, it should be defined in advance so everyone understands what results the program is expected to produce. Only by pre-setting the performance target can you know whether your aim is true.

If you are going to use your CRM (customer relationship manager) and/or MAP (marketing automation platform) systems, be sure you have a way to incorporate your performance targets.

### **3. Plan How to Measure Your Results**

Measurement cannot be an afterthought. Your business outcomes and performance targets provide insight into what data you will need to measure your program's performance, how you will plan to capture and manage that data, and what analytics you will apply to the data. To use any marketing technology to support your measurement reporting you need to plan for this in advance, such as your trusty CRM. Put your elements in place and to test your processes and systems before you hit the "send" button. This is the only way you will be able to truly determine whether the campaign is moving the needle when you review analytic reports. Preparation will help improve your performance management and measurement.

### **Closing**

Following this process for each campaign will do more than just enable you to measure success. It will ensure each campaign is linked to a business outcome the C-Suite cares about, and it will inform campaign component selection and therefore enable you to cost out the campaign accurately. Ideally, this process is followed at times budgeting/marketing planning occurs, and can be used to justify your budget (and if your budget is cut, to justify renegotiating goals/bonus components). [Got more questions? Let's talk.](#)

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