

Strategic Marketing

Seven Steps to Marketing Success

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Strategy and Marketing

Introduction

As agencies market their services, they do so in an increasingly competitive market where differentiation is essential. Unfortunately, many organizations find themselves struggling to launch a series of marketing activities without a specific understanding of their long-term marketing goal. In doing so, they often spend more money than necessary, while lacking a mechanism to determine whether or not they have been successful. How can you avoid this common pitfall, thereby maximizing your company marketing dollar? Amazingly, just a few hours of dedicated strategy time could result in a significant reduction in marketing expenditures while preparing the business to take a quantum leap forward.

A Marketing Magic Bullet?

I often find myself explaining to business owners that successful marketing is not defined by what one does; rather, campaigns achieve results when the agency is focused on why they are utilizing certain techniques.

Across all industries, owners and executives strive to find the ideal marketing template that they can implement at their office and achieve unprecedented success. Unfortunately, this mystical “Marketing Magic Bullet” simply does not exist - Furthermore, there shouldn’t be such a template, as every marketing campaign must be specifically tailored to the individual business in the context of their unique growth objectives and market environment.

By definition, this is strategic marketing. Transcending tri-fold brochures, logo design and elevator pitches, the *strategic marketing* method produces optimal results simply because it is entirely focused on the realization of a very specific desired end. Rather than reactively launching marketing initiatives in response to an immediate need for referrals, or simply trying out what another agency has done, this approach places agencies ahead of the power curve by providing a proactive means of facilitating growth.

Needless to say, strategic marketing requires that owners and executives develop a vision of what they are trying to achieve. More than a general goal of increasing referrals, the vision forms the foundation of all future marketing efforts, including the agency’s goals, target audience, strategies, tactics and more.

Therefore, while there does not exist a “Marketing Magic Bullet,” there are methods that empower agencies to develop their own vision and tailored marketing strategies. It is in that context that we introduce Vision-Driven Marketing, an approach to strategic marketing.

Start with the End in Mind

The concept of *Vision-Driven Marketing* is actually quite simple - By starting with the end in mind, executives are better equipped to devise a strategy that will ultimately lead to success. The goal provides guidance, helping the organization to leverage the best possible techniques to generate an optimal result with the minimum required expenditure.

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In a *Vision-Driven Marketing* model, all of the agency's key marketing-related resources are marching in the same direction toward achievement of defined growth objectives. This includes intake, admissions services, marketing, sales, business development, senior management, and more. It is through this approach that businesses generate significant momentum.



Defining the Elephant

If marketing is this easy, why isn't everyone achieving extraordinary growth? As the old saying goes, sometimes there is an "elephant sitting in the living room that no one wants to talk about." When it comes to Vision-Driven Marketing, integration of employee resources is at the top of the list.

The Vision-Driven approach requires that everyone work toward a common goal. Once the goal is defined by the leadership, it must be communicated to the people – across departments - charged with carrying out the strategies and tactics. Each of the departments must then be willing to overcome company politics to carry out a common mission.

Unfortunately, many organizations struggle with this level of integration. Whether in the early stages or "full-blown," departments within these organizations operate in silos, where sales and marketing battle, marketing and clinical struggle to see eye-to-eye, and the employees selling the ideas aren't always aware of the impact felt by the operational people that need to pick up the pieces after something has been "oversold."

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As if this departmental *dis*-integration is challenging enough, the company leadership may complicate the situation by failing to intervene and/or lead the company through the strategic implementation process. In the book *Execution: The Discipline of Getting things Done*, Bossidy and Charan describe this problem with crystal clarity:

Most often today, the difference between a company and its competitor is the ability to execute. If your competitors are executing better than you are, they are beating you in the here and now...Execution is the great unaddressed issue in the business world today. Its absence is the single biggest obstacle to success and the cause of most disappointments that are mistakenly attributed to other causes.

The absence of execution is not generally a reflection of a company's leadership skills. Quite the contrary, it is often the by-product of employees that are constantly battling competing priorities. When future growth strategy competes for attention against today's fires, it is natural to spend the time focusing on dealing with issues that will make or break the business *today*. However, if organizations fail to plan for growth today, it is fairly certain that they will wake up three years from now in the exact same place.

The good news - Marketing planning is not a cumbersome process; rather, it is the people that make the process overly complex! An old saying goes, "How do you eat an elephant? The answer is one bite at a time!" The same goes for growth planning; just a little bit of time every day or every week will make the difference between that which is imagined and growth that is realized.

Focusing on keeping it simple, Vision-Driven Marketing can be broken into a series of simple and intuitive steps. Segmenting the "elephant" into its component parts, we offer the following seven steps to implement Vision-Driven Marketing.

Step 1: Define your Vision

Start by identifying a group of people who you feel would be most appropriate to discuss agency growth objectives. Try to have enough diversity of opinion at the table that you generate lively discussion, but not so much that you consistently digress into heated arguments. Once you have your group, set aside a standing meeting every week for the next 8 weeks, and use this time to develop your agency's vision and marketing strategy.

Begin with a structured session focused on your agency's vision for the future. Ask the group to imagine that they are now 18 months in the future, followed by brainstorming what the agency "has achieved" (past tense because everyone is "in the future") as a result of their marketing efforts. A few tips:

- Ensure that the discussion begins with a review of existing agency strategic goals—no need to reinvent the wheel.
- Be as specific as possible, ranging from a list of referral metrics to a discussion of the vision for the agency's marketing culture.
- Encourage the team to think beyond the day to day issues that may hinder success; rather, challenge them to imagine the way they would like it to be.

Completion of this step may require a couple of meetings. You know you are finished when you have a solid paragraph description of the ideal future that you envision for the agency.

Step 2: Evaluate Success Obstacles

High-achieving organizations will evaluate potential obstacles prior to launching new efforts. By looking potential problems in the eye, owners are better equipped to avoid potential pitfalls.

Ask all of the stakeholders to brainstorm a list of obstacles that could prevent the agency from realizing the above vision for the future. Consider financial resources, staff, marketing personnel, time, priorities, recruitment/retention, and competition. After you have a solid list, ask the group if the vision needs to be refined and make adjustments accordingly.

Step 3: Develop your Brand Identity

Every agency is different – a “brand” is used to authentically demonstrate organizational identity, differentiate services in the market and convey value in the most persuasive manner. Beyond your standard services (PT, OT, Skilled Nursing, Aides, etc.) and the payment sources you accept lay the description of your agency’s identity. Some questions for your team to consider:

- What do you stand for?
- What is your mission?
- What is your company culture? What do you want it to be?
- What image do you want to portray to the market? How is that different from today?
- What is the feeling you want your audiences to have about your business after they interact with you?

Once you have a firm sense of your agency’s identity, it is time to consider your audience. Termed “targeted communication,” this strategic method helps agencies “meet their audience where they are at” thereby ensuring that campaigns are targeted and effective. Gather your group together and brainstorm:

- Who are your audiences?
- What does each of your audiences care about?
- What value do you bring to each audience?

Remember - what matters to you may not necessarily matter to your audience. Place yourself “behind their eyeballs” and attempt to discern the fundamental reason that they would want to work with you. If you can hit this sweet spot, your marketing efforts become that much more powerful.

Step 4: Devise your Strategy

In steps 1 – 3, you have completed the essential work that prepares you to intuitively develop the marketing strategy that will lead to success. Gather together your team and brainstorm the activities and campaigns that will take you where you want to go in the next 18 months.

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Focus on the strategies that will bridge the gap between where you are now and where you want to be. Remember that strategies and tactics are two very different things. *Strategies* describe the avenues that you will pursue to achieve your goals. *Tactics* are the action items that operationalize your strategy.

Because one cannot apply the “marketing magic bullet” in this step, it is important that you use the first three steps as a launch pad. You have “plugged in” to your business in a way that spurs creative thinking about growth strategy. Now it is time to consider the avenues that will produce results, including:

- Public Relations/Media
- Intake Processes
- Direct Marketing
- Sales Training
- Channel Marketing
- Strategic Alliances
- Marketing Collateral
- New Technologies
- Internal Marketing

After your brainstorm is complete, critically evaluate all of the identified strategies in the context of your vision for the future. In doing so, you ensure that your efforts are in line with your goals and that you find the path of least resistance to translate goals into reality.

Step 5: Create a Tactical Plan

Once your strategy is in place, it is time to map out the most efficient and effective path to produce optimal results. This step is quite simple; yet, it is an activity that is commonly skipped. A few tips:

- List all of the action steps associated with each key strategy.
- Include every step, no matter how mundane.
- Assign a lead.
- Assign a due date, and hold the team to it.
- Monitor the list and check it off when it is done!

The Tactical Plan can be housed electronically (in an Outlook Public Folder for example), or on paper. Either method is fine, provided that it remains at the forefront of the agency’s attention.

Step 6: Implement the Plan

Often easier said than done, this step requires follow-through. Implementation often comes into conflict with other agency priorities, and this can present management challenges. The good news – You already have a plan, responsibilities and timelines. Now it is a matter of staying focused:

- Hold your “Leads” accountable
- Revisit the plan every week

- Celebrate progress and key milestones

Step 7: Measure the Results

As outlined in the very beginning, the purpose of this effort is to achieve a specific desired end...Is the plan working? In Step 1 you defined a series of company goals. As the plan is implemented, benchmark progress against these performance metrics. If you are succeeding—Celebrate! Implementation of these plans requires significant work from the staff. It is important to recognize these efforts and demonstrate appreciation. This recognition will energize them even more!

If you have not observed the desired results, critically evaluate the plan and course correct as needed. A few questions to consider:

- Has enough time passed?
- Have you created momentum?
- Is your message on target with your audience?
- Do you need to refine the plan?

It is important to note that course correction is a natural part of implementing a marketing strategy, as nothing is perfect right out of the gate. Therefore, leave room for adjustments and be persistent above all else. You are a few minutes a day away from the success you want to achieve. Day-to-day challenges will always get in the way; the question is how you manage them.

Conclusion

While the concept of Vision-Driven Marketing is simple, many executives make it overly complex. Therefore, remember to keep it simple—this does not need to be perfect, it just needs to be a compass helping you to navigate along the path of success.

I recently read a quote that said, “That which you think on manifests.” In other words, by envisioning a positive future full of success, you are already on your way to making it happen!

About the Author

Heather is the President and CEO of Heather L. Rooney Strategy and Marketing, a national marketing and strategic planning firm. With an innate ability to forecast future trends, Ms. Rooney is among the most respected growth strategists in the home care industry.

Having been a member of the home care community for more than 10 years, and with nearly 18 years of sales and marketing experience, Ms. Rooney is accustomed to guiding a diverse cadre of home health, hospice, private duty organizations in their quest to transcend performance plateaus. From small agencies to large national chains, she is known for infusing clients with energy and empowering companies to achieve unprecedented growth.

Ms. Rooney serves on the Board of Directors for the Community Health Accreditation Program (CHAP) and the Distinguished Board of Judges for the Stevie Awards. She is a nationally respected keynote presenter and published author on topics related to emerging market trends, sales, marketing, business development, business intelligence, leadership, strategic planning, growth, and more. Amidst her diverse content expertise is one essential thread: she is consistently recognized for her ability to cultivate vision, build unity of purpose, offer practical guidance and inspire change.

Ms. Rooney is also an award-winning CEO - She was named the 2008 Entrepreneur of the Year by the Stevie Awards for Women in Business, and she won the 2006 Stevie Award for Best New Business.

Prior to founding Heather L. Rooney, Heather built and directed all aspects of Sales, Marketing, and Business Development for a leading provider of business intelligence in home health, hospice and private duty. Her background includes real estate investment, franchise businesses, international pharmaceuticals, cultural diversity, non-profit juvenile delinquency prevention, community policing, and federal grant management. She is a trained conflict mediator and professional facilitator.

Heather graduated Magna Cum Laude and Phi Beta Kappa from the University of Washington with a focus on Criminology, Sociology and Criminal Justice. She resides in Seattle with her husband and young daughter.



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