

Template

Digital Marketing Strategy Planning Template

Begin planning your marketing strategy using the RACE Framework



Part of the Digital Marketing Strategy and Planning Toolkit

The challenge to implement a fully integrated marketing approach is more crucial than ever before.

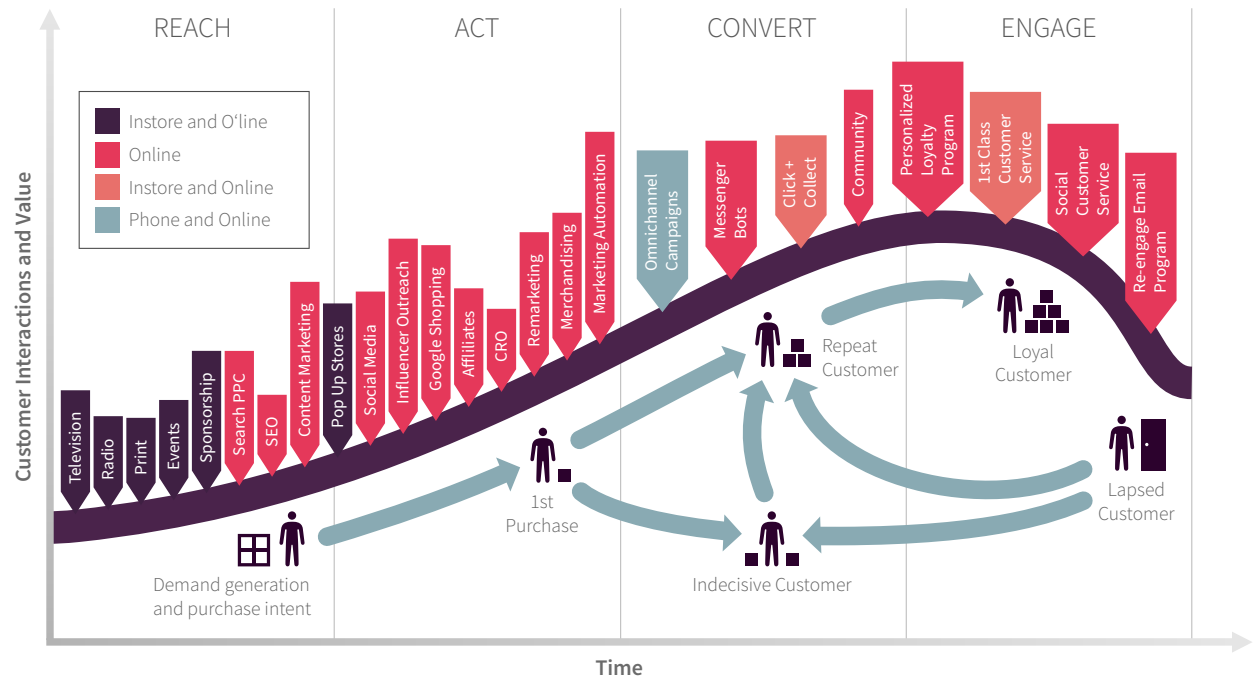
With customers choosing brands whose messaging, marketing and values go beyond the product, the need to rapidly transform your marketing efforts digitally, is critical to ongoing engagement and success.

Let's highlight a few key areas:

- Customer expectations of value are more complex than ever. As well as generally being better informed, they want a connection with brands that goes beyond quality products and competitive pricing
- Emerging technologies are making it easier to cater to customer needs and create opportunities in both B2B and B2C environments
- Engagement initiatives require consistent effort over time. The ability to adapt to shifts in consumer and channel preferences while remaining relevant is critical
- Targeted audience research is needed to reveal who your customers are, how they behave, and what platforms they prefer to use
- Integrating marketing automation into your digital marketing strategies is the key to consistent and reliable growth

So, where do you start?

The key to success is using a proven digital marketing growth process to leverage your specific knowledge of your industry to make the most of new and emerging technologies while consistently proving to customers that what you say is what you do.



Achieving digital marketing success in crowded marketplaces starts with a goal-driven, data-fueled digital marketing plan. Our scalable, principle based approach gives you the framework you need to achieve your digital marketing goals - whether working alone or within larger teams.

Read on to get started with your journey.



INTRODUCTION

How to use this RACE Framework planning template

Aims of this template

This template will help you rapidly review and present a simple digital marketing strategy. It is based on the Smart Insights RACE Framework and six pillars of digital marketing success which ensures complete and comprehensive coverage of all the marketing activities needed to increase leads and sales across the customer lifecycle.

How to use this template

For each of the six pillars, you will be presented with a number of questions about your current digital marketing activities.

Use the checkboxes to quickly identify those activities that are in place.

Next, review the unchecked boxes and fill in the corresponding area of the table with the actions required in priority order, where possible.

Turning your plan into action with Smart Insights resources

This template will give you a good starting point. To fully implement your plan we will highlight specific Smart Insights resources to support action across all the essential activities.





Planning and Governance	Goals and Measurement	Media	Content	Experience	Conversational Messaging
<ul style="list-style-type: none"> • Strategic initiatives • Marketing integration • Digital transformation • Business and revenue models • Budgets and ROI • Systems, structures and processes • Resources and skills • Marketing technology 	<ul style="list-style-type: none"> • Forecasts • Digital KPIs • Digital dashboards • Customer profiles • Attribution 	<ul style="list-style-type: none"> • Paid media • Owned media • Earned media • Offline/online integration • Always-on and campaign investment 	<ul style="list-style-type: none"> • Content marketing strategy • Top-of-funnel (TOFU) • Middle-of-funnel (MOFU) • Bottom-of-funnel (BOFU) 	<ul style="list-style-type: none"> • Website customer journeys • Landing pages • Multichannel path to purchase • Conversion Rate Optimization • Personalization 	<ul style="list-style-type: none"> • Email marketing • Mobile messaging • Human-assisted chat • Automation and CRM

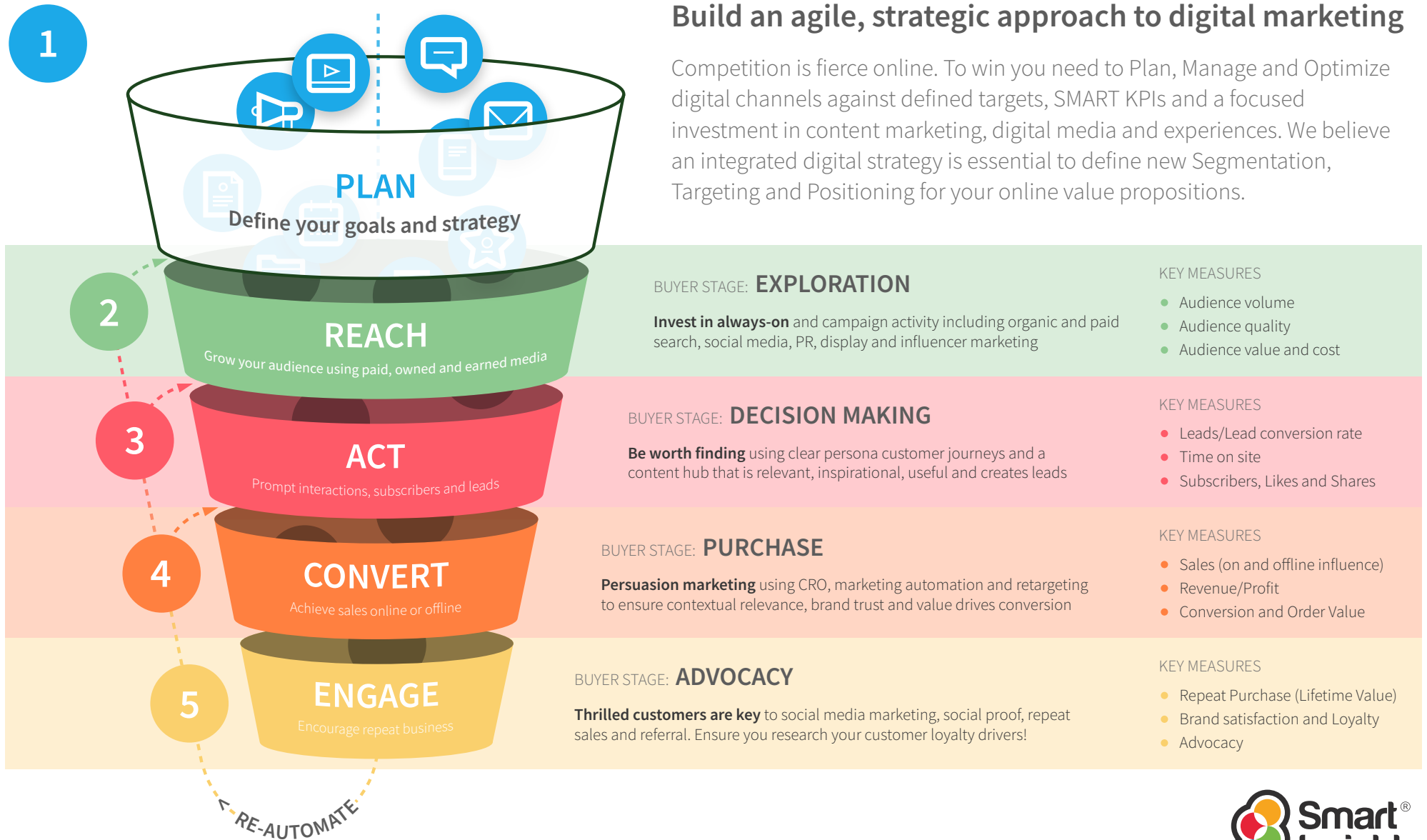
The six pillars simplify digital marketing complexity from hundreds of tools and communications that could potentially be used.

Our research shows that many people invest time and money without a plan, goals or measurement.

Our six pillars highlight the key investment areas that every organization, regardless of size or sector, needs to consider when they are developing their plans and priorities for interacting with and selling to consumers or businesses online.

We recommend that you review these success factors across each part of the RACE Framework which you will be guided through in this template.

The Smart Insights RACE Framework





PLAN

Plan: Define your strategy

To create an effective digital marketing strategy, you must first have a good idea of what you're currently doing, as well as your strengths and weaknesses.

It's also important to understand the market and your competitors' activities.

This will help highlight areas to focus on and enables you to create actionable, measurable goals.

Action points:

Identify all your current digital marketing activities.

Work out your strengths, weaknesses, opportunities and threats. The SWOT/TOWS frameworks are useful for this.

Outline goals and objectives and make sure they're Specific, Measurable, Attainable, Relevant and Timely (SMART).

Understand who you are marketing to, their needs, wants and expectations

Key performance measures:

Situation review (current output) | Set goals and objectives | Define prioritized strategy

Success factors and deliverables for this planning stage:

- Quantified opportunities based on benchmarking competitor activity
- Clearly defined goals and objectives
- A data-driven process through customized analytics and KPI dashboards
- A defined strategy with prioritized investments in digital marketing
- Defined customer personas and online value propositions

Take the next steps and turn your plan into action

Read our free Guide to Digital marketing success using the RACE Framework

This explains the five key activities to include within your plan to improve performance from your Plan Activities and gives examples of digital marketing techniques included in this template

[ACCESS NOW](#)



6 Pillars of Digital Success	Audit of current capabilities <i>Check the box for the activities you have in place.</i>	Strategic initiatives and actions <i>For the boxes that are unchecked, write your planned action in the space below</i>
1. Planning and governance	Have you audited your current digital marketing activity? Do you have a digital transformation change management plan? Do you have a defined customer acquisition plan? * Have you defined your online value proposition? Do you have prioritized investment for digital marketing activities?	
2. Goals and measurement	Have you developed SMART objectives that align with your forecast commercial contribution from digital channels? Have your Google Analytics goals, events and dimensions been customized? Do you have a digital performance review dashboard in place?	
3. Media	Have you reviewed your digital media effectiveness? Have you assessed your internal media creation capability? Do you have a budget for external media creation? Do you have an established media quality assurance process?	
4. Content	Have you assessed your content marketing effectiveness and ROI? Do you have a defined content marketing strategy?	
5. Experience	Have you benchmarked your website for usability and customer journey effectiveness? Do you have a defined plan for structured testing of your website? Do you have a CRO/personalization plan? *	
6. Conversational messaging	Have you planned your customer segmentation and targeting strategies? Do you have a defined customer engagement plan? * Do you have a plan for automated response technologies? *	

* Most needed in larger businesses



REACH

Reach: Grow your audience

Reach involves building awareness of your brand, products, and services on other websites and in offline media to build traffic to different web presences like your main site, microsites or social media pages.

It involves maximizing reach using continuous inbound communications and planned campaigns to create multiple interactions using different paid, owned and earned media touchpoints.

Action points:

Perform keyword research to find areas of strength and opportunity - both paid and organic.

Define your key brand messages, focussing on growing audience awareness, familiarity and purchase intent.

Create segments and goals in Google Analytics.

Key performance measures:

Audience volume | Audience quality | Audience value and cost

Success factors and deliverables for this planning stage:

- A clear picture of how your digital media channels collectively perform
- Standard campaign tracking and attribution for reviewing performance
- A gap analysis for target keywords based on different consumer search types to show opportunities for organic and paid search
- A social media campaign plan to promote the right content to the right people and work with relevant influencers
- A paid and display media budget and schedule defining investments to reach your audience

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1. Planning and governance	Have you created an acquisition budget and plan? Have you defined your key brand messages, focussing on growing audience awareness, familiarity and purchase intent? Have you performed keyword research to find areas of strength and opportunity - both paid and organic?	
2. Goals and measurement	Do you have a conversion-based forecast model for media ROI? * Has a keyphrase gap analysis been created? * Have you created segments and goals in Google Analytics?	
3. Media	Is your organic and paid search strategy (inc Ads display network) defined? Have you reviewed your paid media prospecting options (e.g. paid social and programmatic)? Has the partner and influencer marketing potential been explored?	
4. Content	Is your TOFU content optimized and attracting visits through organic search social media? Does your content address your audience's needs better than the competition?	
5. Experience	Is your technical SEO and organic social sharing integrated into the site to effectively attract inbound visits? Has your website been speed benchmarked to be effective on mobile?	
6. Conversational messaging	Has investment been made in permission-based publisher/event organizer email campaigns? Are you co-marketing with complementary list owners using email marketing? Are you using social selling, outreach and account-based marketing for ABM? *	

* Most needed in larger businesses



ACT

Act: Prompt interactions, subscribers and leads

Act is aimed encouraging interactions to generate leads. Rather than immediately focussing on conversion, you need to inspire interactions with your content and social media profiles.

You can then create a plan that will persuade site visitors to take the next step on their buying journey.

Action points:

Review existing landing pages qualitatively and quantitatively (analytics and user benefit).

Decide which customer actions make them a valuable lead.

Identify key 'moments' to encourage signups.

Key performance measures:

Leads | Dwell time | Shares/comments/likes

Success factors and deliverables for this planning stage:

- Identified website improvements to make customer journeys more efficient
- Optimized landing pages and content hub to maximize conversion to lead
- Clearly defined lead scoring based on customer personas, relevance to your business/service and level of buying intent
- A budgeted content marketing strategy to support acquisition
- An editorial calendar and campaign plans

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1. Planning and governance	Do you have a defined content marketing strategy? Have your interactions with customers been mapped across the entire path-to-purchase?	
2. Goals and measurement	Do you have a method of measuring the conversion rate for different types of leads or subscribers? Do you have a method of assessing the quality of visitors to your website (e.g. lead profiling and grading)?	
3. Media	Have you reviewed the percentage of interaction across desktop and mobile devices and the customer journey effectiveness? Do you have ad retargeting in place to generate leads (B2B and high-value)?	
4. Content	Is your MOFU content optimized and generating leads based on preferences? Is your content perceived as credible and trustworthy? Does your content put your audience's needs first?	
5. Experience	Are your landing pages optimized for generating leads (CRO)? Do you profile for relevant nurturing (e.g. lead scoring and grading for B2B)? *	
6. Conversational messaging	Are your targeted, branded welcome email sequences sent to new leads? Is your chat or community used to encourage prospect interaction? Is your chatbot system effective in meeting the needs of your audience?	

* Most needed in larger businesses



CONVERT

Convert: Achieve sales online or offline

This is the conversion from lead to sale. It focuses on getting your audience to take that vital next step which turns them into paying customers.

It's important to remember that payment can be made through online e-commerce transactions or offline channels.

Action points:

Identify conversion funnels and paths to purchase.

Understand what level of personalization can be achieved with your current resource.

Establish a communication process between your marketing and development teams.

Key performance measures:

Sales (on and offline -influence) | Revenue/profit | Average order value

Success factors and deliverables for this planning stage:

Effective email and ad nurture and retargeting process

- A plan to implement personalization elements to your site based on customer behaviour
- A website that is fully optimized for mobile browsing
- A multichannel marketing plan that lets customers reach you through different 'conversation marketing' options such as email, LiveChat, and product demos
- A list of key pages to be optimized through AB testing

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1. Planning and governance	Do you have a structured testing plan in place? Have you defined your CRO or personalization plan? * Is your testing regular? Does your current digital marketing activity support offline conversions by the sales team?	
2. Goals and measurement	Is Google Analytics e-commerce tracking relevant for your business? Do you use attribution to review digital channel performance? * Is the influence of digital channels for prompting offline sales understood?	
3. Media	Are you investing sufficiently in Google Ads and paid social retargeting? Can you attribute conversions to individual media types?	
4. Content	Is your BOFU content optimized and developed to match preferences that nurture on the path-to-purchase? Does your structured testing programme for CRO support growth?	
5. Experience	Are your basket and checkout processes effective and efficient (E-commerce businesses)? Is multichannel selling used to support conversion (Non e-commerce)? Is your personalization effective for return visitors and customers? Do you have a seamless conversion journey?	
6. Conversational messaging	Do you have an automated email nurture sequence? Is site personalization in place and optimized, possibly including artificial intelligence? Are you using digital sales assist (e.g. online demonstrations, sales calls and webinars)?	

* Most needed in larger businesses



ENGAGE

Engage: Encourage repeat business

Customers are great, but repeat customers are even better. Now you need to keep adding value to your brand experience so that buyers become brand advocates.

This can be achieved through post-sale nurturing, such as storytelling, case studies and engaging social content.

Action points:

Outline your onboarding process using email and online messaging

Establish your multi-channel customer service process

Identify post-sale customer data for areas you can use in remarketing communications

Key performance measures:

Repeat purchase (lifetime value) | Satisfaction and loyalty | Advocacy

Success factors and deliverables for this planning stage:

- A welcome sequence for onboarding new customers
- A list of website elements that promote customer engagement and loyalty
- A refined customer service process to deal with queries through multiple channels
- Email marketing campaigns designed to keep customers interacting with your site and your products.
- A social media plan that amplifies the human element behind people who have already bought from you.

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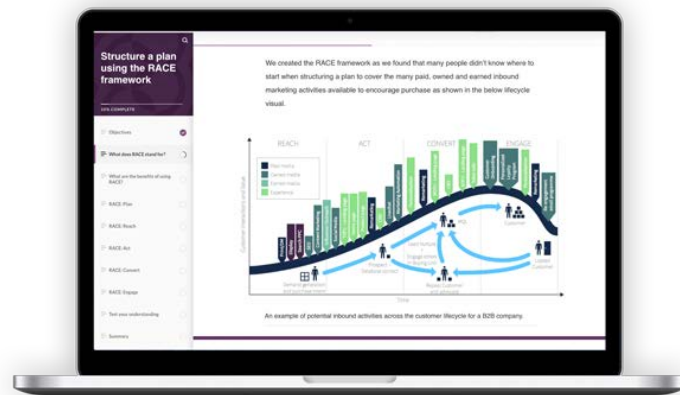
[ACCESS NOW](#)



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1. Planning and governance	Have you conducted customer research focusing on digital channel effectiveness? * Do you have a 90-day planning process for implementing your email contact strategy including 'always-on' and campaign activity?	
2. Goals and measurement	Are the custom dimensions set in Google Analytics used to track returning customers? * Is customer or email subscriber engagement tracked? Are your customers profiled for characteristics, value and preferences? Do you assess customer satisfaction with digital channels and loyalty drivers?	
3. Media	Has your use of customer lists in Google Ads and paid social been reviewed? Have you reviewed and optimized your Google Ads brand campaigns? Is your organic social media amplification effective for acquisition?	
4. Content	Is your ROFU content optimized and have a retention focus for existing customers? Is your personalization effective for return visitors and customers? Is your customer support and care content effective (e.g. FAQs and knowledge-bases)?	
5. Experience	Is your on-boarding process effective for new customers? Is the customer journey for returning visitors and customers effective? Have loyalty drivers been researched to identify barriers to repeat purchase?	
6. Conversational messaging	Have you reviewed the email and website or mobile app you use for customer on-boarding for effectiveness? Are your customer newsletters targeted and optimized? Are you using targeted customer email communications? Are you using a customer communications preference centre and privacy options? * Are you effectively using social media to develop customer communities? *	

* Most needed in larger businesses

Ready to start creating your RACE winning strategy?



You have identified key areas for improvement and now you need to create a digital strategy, organize your activities, and put your plan into action.

That's where the RACE Growth Process comes in.

Whether you need to refine your personas, start using a new social media platform or review your SEO activities against current best practice, we've got you covered.

Smart Insights offers digital learning modules, guides, and templates across all channels of digital marketing. With business membership, you'll be able to take action directly and see results sooner.

Take the next step toward a winning marketing strategy



Team Development

Track learning and give your team the freedom to learn anytime and anywhere, by combining training with application.

[UPSkill My Team](#)



Business Growth

Grow your business by learning and applying up-to-date best practice and the latest marketing techniques.

[Grow My Business](#)

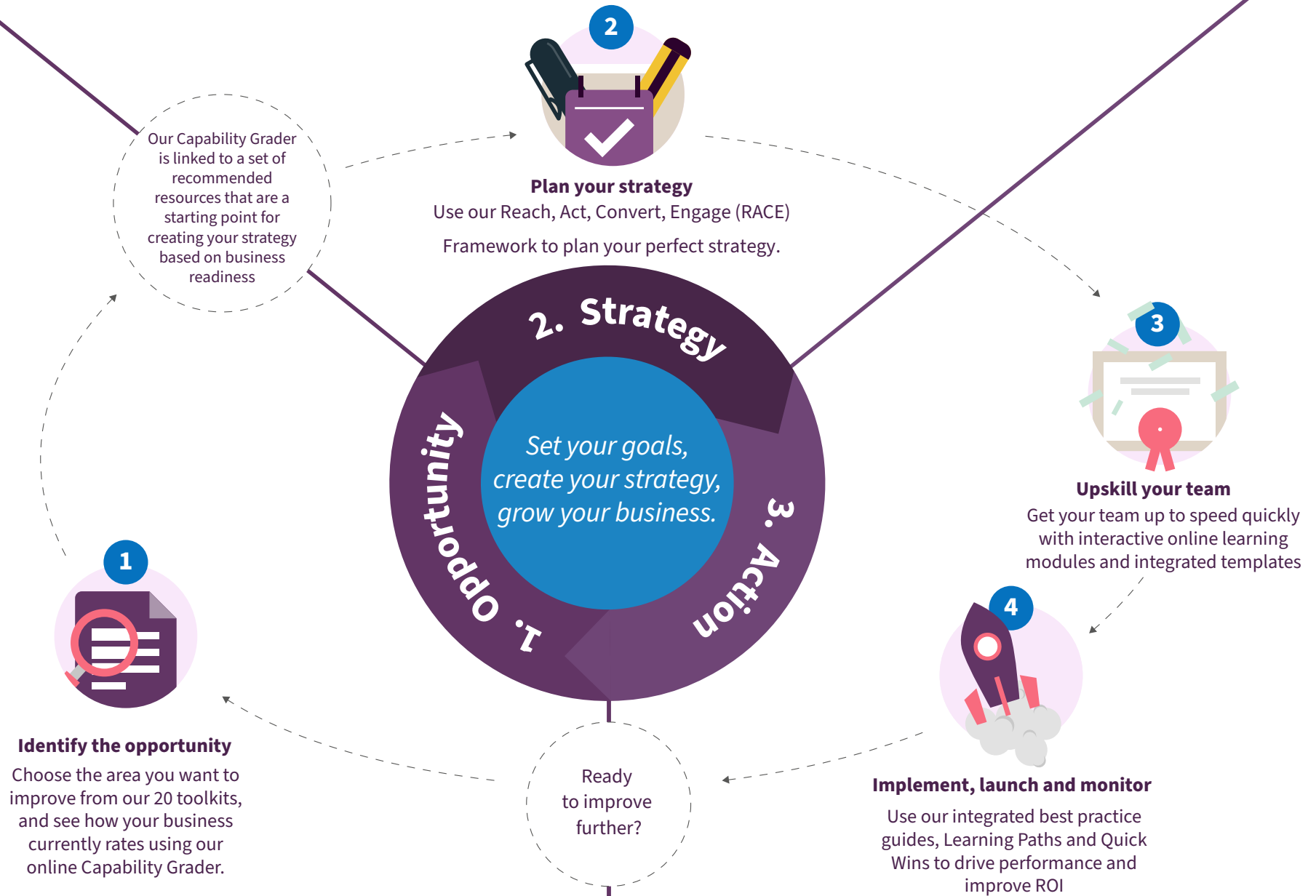


Book A Demo

Get in touch with one of our experienced sales representatives to take a guided tour of the Smart Insights platform.

[Book Now](#)

HOW DOES THE RACE GROWTH PROCESS WORK?





WHY DO BUSINESSES JOIN SMART INSIGHTS?

Common business challenges

“We can’t keep up with our competitors.”

Far from ‘use once and forget’ - our toolkits are updated on a consistent basis to ensure they feature the latest methods and implementation strategies for you to use - before your competitors do. For our members they’re a trusted companion, keeping them ahead of their competition.

“We don’t have an integrated marketing strategy”

We’ll show you how to take a structured approach using our RACE multichannel marketing system. The end result is a clear, defined strategy with clear KPIs and dashboards allowing you to control spend and measure return on investment.

“My team lacks the skills to make this a success.”

Digital marketing is complex, and using the latest methods can be difficult. That’s why Business membership includes e-learning for your whole team. Our members use it to monitor their team’s progress, discover (and fill) skills gaps and see improvement over time.

Five reasons you need Business membership

- 1. We’ll help you *GROW* your brand, your business and your marketing skills**
Our resources and advice highlight strategy techniques, best practice tips and real-life examples to reduce the guesswork involved in digital marketing.
- 2. We’ll help you *PLAN* more effectively and efficiently.**
With our templates, you’ll be able to quickly create digital marketing plans and budgets.
- 3. We’ll show you how to *TAKE CONTROL*.**
Our RACE system, templates and budget spreadsheets will give you the tools you need to plan, manage and optimize your marketing activities across all your digital and offline channels.
- 4. We’ll save you *precious TIME*.**
Time is a commodity that always in short supply, so it’s important to have a one-stop-shop for curated digital marketing advice and learning and improvement resources.
- 5. We’ll save you *MONEY*.**
With our best practice advice, you and your team will get it right first time and avoid costly mistakes. We’ll show you how to use analytics and KPIs to identify inefficiencies and highlight growth opportunities.



WHAT DO MEMBERS SAY ABOUT BUSINESS MEMBERSHIP?

We're proud to be able to say that since 2009, we've been able to help thousands of businesses of all sizes - and all over the world - improve ROI from their marketing activity.

It really doesn't matter whether you're an army of one, you work for a global powerhouse or somewhere in between. Business membership is relevant and has been proven to improve results.

Get better results

"I'd recommend signing up to Smart Insights for a suite of useful tools from planning templates to strategy docs and a variety of other guides to make your job easier."

Andrew Topliffe
Digital Marketing CoE Leader



Tenfold improvement

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Patricia Goldsmith
Director



Make your job easier

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Daisy Seymour
Marketing Director



Business membership gave me a true digital marketing structure ...

"...which I could share with business units across the globe. The cherry on the cake is access to best practices, guidelines, templates and insights on how to use them. Thank you!"

Cristophe Ferrasse
Global eBusiness Leader, Royal Canin SAS



+ 150,000 marketers in companies of all sizes