



Q&A with A&J Presents:

# HOW TO ALIGN YOUR MARKETING PLAN WITH YOUR STRATEGIC PLAN



Marketing  
Strategy

**1**STEP

# Welcome!

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- Ground Rules
- Introductions
- Our Why
- “How to Align” Presentation
- Q&A & Discussion

# Ground Rules

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1. You're muted so use chat, or unmute yourself to ask questions.
2. Be respectful. When you're not muted everyone can hear and see you.
3. We will end early or right on time.

# 1 Bold Step

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Jennifer Jurgens,  
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Adam Clarke  
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We believe that everything can be more efficient; but especially the sales and marketing process. So we apply LEAN principles to create systems, order, and accountability to generate demand, increase sales, and prove return on marketing investment.

We believe that marketing is measurable, and therefore manageable, VALUE-ADD. **(and not OVERHEAD)**



# Jay Hidalgo

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Jay Hidalgo has a mind for business, and a heart for seeing people succeed.

For more than 20 years, he's helped executives at businesses, non-profit organizations, and ministries grow their organizations, improve operational efficiency and reach their markets.

The approach is fairly straightforward: Help the company or individual become aware of their current state; identify where they are able to go; then create and implement the right strategic process and framework to get there.



# Why Q & A with A & J?

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There's so much going on; wouldn't you like to be able to ask marketing experts questions and get straight (and free) answers?

***We thought, yes!***

We all have a little Zoom fatigue so let's make this interactive.

# Why Align Marketing Plan to Strategic Plan?

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# Disaster on the Inside...

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# 9 Principles to Effective Strategy Planning

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1. Manage the Whole
2. Breakthrough Is Horizontal
3. The Truth Sets Us Free
4. Perspective before Planning
5. Make the Vision Clear
6. Focus on the W.I.N.s
7. Form Follows Function
8. Constant Adaptation
9. If You Plan Your Work and Work Your Plan, Your Plan Will Work.

# The Real Estate Agent is the Marketer

- You help present the company.
- If you present something that is a mess internally, who wins?
- You need to understand where the organization is headed.
- You need to align your marketing goals directly with overall company goals.



# Marketing House

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Mission & Vision

Values

Company Focus Areas

Marketing Focus Areas

KPIs and Initiatives

# Example of Alignment

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**Vision:** We believe education makes life better so we equip the educational community to conquer their challenges by providing software and services that improve the learning experience.

**Values:** Respect. Learning. Trust. Excellence.

**Company Focus Area:** Sales & Marketing Alignment.

**Marketing Focus Area:** Solid Marketing Operations & Systems.

**KPI:** 3X Proven ROMI.

**Initiative:** Marketing Automation & CRM systems implemented and integrated, fully operational by end of Q2, 2021.

# 4 Tips for Making it Work

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Create & Document the Plan.

Strategy vs Execution.

Make Work Visible. Keep Teams Informed.

Continually Improve Processes.

*“Some people think the big idea is in the ‘what’. I believe that the big idea is in the ‘how’.”*

- Jen Jurgens

# Questions and Answers?

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Is Now the Time to Try New Marketing Avenues or Expand on Tried & True?

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## Q and A



# Thank You!

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Save the Date for our webinar Nov 4th at 2:00pm:

**“Help! My Boss Has Too Many Great Ideas!”**

**How To Wrangle A Leader That Is A Visionary**

**Find us**

**[JayHidalgo.com](http://JayHidalgo.com) or [1BoldStep.com](http://1BoldStep.com)**

