**BUSINESS**

**CASE**

*for new marketing technology*

A Proposal for Increasing Marketing’s Ability

to Drive More Revenue and Profitability with

Integrated Omnichannel Marketing Planning Software

 [Date]

 Prepared by

 [Name]

# OBJECTIVE

Facilitate a transformation in the strategic marketing planning process to increase marketing's effectiveness and drive more revenue and profitability

Shift from the current channel-centric approach of planning to an omnichannel customer-centric practice by

# implementing integrated omnichannel marketing planning software

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## Challenge: Current tools do not support integrated omnichannel marketing planning, defined as:

* A practice of strategically aligning and programming all channels and touchpoints to work together to create a cohesive and compelling customer experience that builds awareness and trust while advancing the customer journey to drive more revenue
* A practice of communication, collaboration, and workflow automation that eliminates redundancies and increases operational efficiency

## Opportunity: Expected business impact from an integrated omnichannel customer-centric approach

* Increased revenue: [Gartner has found](https://www.forbes.com/sites/shamahyder/2018/11/29/why-integrated-marketing-is-the-future/) that Integrated campaigns across 4+ channels outperform single or dual-channel campaigns by 300%. [Omnisend research](https://www.omnisend.com/blog/omnichannel-statistics/) found that Marketers using three or more channels in a campaign earned a 494% higher order rate than those using a single-channel campaign
* Increased profitability: [Deloitte research](https://www2.deloitte.com/content/dam/Deloitte/de/Documents/WM%20Digitalisierung.pdf) found that customer-centric companies were 60% more profitable compared to companies that were not customer focused

Current Tools & Proposed Change

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| **Tool** | **Used For** | **Action** |
| [slide design tool - e.g. PowerPoint, Google Slides] | Designing standalone static timelines for strategic initiatives and campaigns | Replace with integrated omnichannel planning solution |
| [spreadsheet tool - e.g. Excel, Google Sheets] | Tactical planning siloed by channel; each channel’s independent sheet is formatted to accommodate its unique data set | Replace with integrated omnichannel planning solution |
| [project management tool] | Efficient management of assignments, shows people’s current tasks and due dates, completed tasks are hidden, workflows streamline implementation | Set up 2-way sync with integrated omnichannel planning solution |
| [production tool] | Channel specific design and development of marketing communication vehicles and assets | Set up 2-way sync with integrated omnichannel planning solution |

# SITUATION ANALYSIS

Current tools do not support integrated marketing planning

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| **Challenge** | **Risk** | **Business Impact** |
| Channels are planned in silos | Uninformed channel-centric decision making. Incongruent disconnected customer experiences, disjointed customer journeys. Negative drain on brand trust, conversion rates, customer satisfaction, customer retention | Lost revenueLost profitability |
| No way to connect tactics to objectives and strategy which live in separate documents | Team members are unable to see how their work contributes to the overall customer experience and company’s success. Pulls down productivity and job satisfaction. Planning objectives become channel focused. Random acts of marketing fail to advance the customer journey | Lost revenueLost profitability |
| No visibility into the unified marketing plan / omnichannel customer experience | Unable to identify opportunities, gaps, overlaps, and disconnects across channels. Leads to fragmented customer journeys. Meetings and email relied on to keep people informed. Lack of team member accountability. One off timelines are designed for executive presentations. Pulls down productivity and job satisfaction | Lost revenueLost profitability |
| Unable to filter by campaign or promotion | Cannot optimize cross-channel coverage, timing, message sequencing to effectively advance the customer journey | Lost revenueLost profitability |
| Inability to react quickly to changing market conditions | Missed opportunities, slip ups | Lost revenue |
| Poor communication and coordination with sales, product, customer support | Missed opportunities, fractured customer journeys. Negative drain on brand trust, conversion rates, customer satisfaction, customer retention | Lost revenueLost profitability |
| No historical marketing plan of record | Hinders the ability of the team to learn, adapt, and optimize efforts. Constant reinventing of the wheel for each planning cycle. Lack of knowledge transfer. Stagnant or slow sales growth. Inefficient spend of marketing budget | Lost revenueLost profitability |
| Siloed budget management | Budget prone to being out of sync with the current plan. Contributes to inefficient spend of marketing  | Lost profitability |
| Current tools not designed for marketing planning | Inordinate amount of time spent designing static campaign timelines, formatting spreadsheets for channel specific plans, and replicating plans in presentations to update leadership. Marketing plan rarely updated or requires double data entry. Pulls down productivity and job satisfaction. Contributes to errors in execution | Lost revenueLost profitability |

CMOs cite organizational silos as

their biggest internal challenge to meeting revenue targets.

Source: [the CMO Council and Televerde](https://www.marketingcharts.com/business-of-marketing-117343)

# SOLUTION

# Annum

Annum’s integrated planning solution brings all initiatives, campaigns, channels, content, online and offline tactics together in one unified calendar view so marketers can identify opportunities and gaps, optimize the omnichannel customer experience and drive more revenue. <https://www.annumplanning.com/>

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| **Benefit** | **As a Result** | **Business Impact** |
| Empowers customer-centric decision making by centering cross-functional marketing teams on the omnichannel experience  | Teams deliver more cohesive and compelling omnichannel customer experiences and strategically align channels to advance the customer journey. Lifts brand trust, conversion rates, and customer retention | Increased profitabilityIncreased revenue |
| Eliminates random acts of marketing by connecting tactics to strategy | Ensures tactics are aligned with business goals and objectives. Team members see how they contribute, enhances job satisfaction | Increased profitabilityIncreased revenue |
| Informs planning by highlighting holidays and seasonal customer insights | Makes it easy to identify opportunities for tying into cultural events and determining optimal timing of in-market actions | Increased profitabilityIncreased revenue |
| Fuels strategic cross-channel decision making with views filterable by campaign, target audience segment, and more | Teams can optimize cross-channel coverage, timing, and message sequencing of campaigns and other initiatives. Then check for overlap with everything else happening | Increased profitabilityIncreased revenue |
| Helps teams learn, adapt, and optimize their efforts by serving as a historical marketing plan of record | Fuels optimization of marketing budget and sales growth and provides easy knowledge transfer when there are transitions in team members.  | Increased profitabilityIncreased revenue |
| Gets everything and everyone on the same page by serving as a single source of truth | Streamlines communication, fosters collaboration, and increases productivity. Provides accountability at the tactical level | Increased profitability |
| Purpose built intuitive design eliminates formatting and set up time | Teams begin planning quickly. Increases productivity and job satisfaction | Increased profitability |
| Simultaneous budget management keeps the budget automatically in sync with marketing plans | Empowers fiscally responsible decision making and budget optimization | Increased profitability |
| Fosters corporate wide customer-centricity and alignment between marketing, product, sales, and customer success | Teams deliver a more cohesive and compelling customer experience that advances the customer journey. Lifts brand trust, conversion rates, customer satisfaction, and retention | Increased profitabilityIncreased revenue |
| C-suite presentation ready | Eliminates the need to “design” one off timelines for executive presentations, increases productivity | Increased profitability |
| Automatically aggregates tactics buried in project management tools by [integrating with 1000+ apps](https://www.annumplanning.com/marketing-calendar/integrations/) | Eliminates the need for double data entry, keeps people working in their preferred tools, enhances plan accuracy and completeness, productivity and job satisfaction  | Increased profitabilityIncreased revenue |
| Provides business unit visibility via a [Lead and Nested connected calendar structure](https://www.annumplanning.com/marketing-calendar-software/enterprise-marketing-calendar-system/) for large enterprise organizations | Ensures alignment with corporate strategy and goals | Increased profitabilityIncreased revenue |
| Minimum set up, intuitive, self-serve how-to guides, support available via email and Zoom | Requires no IT involvement, marketers are empowered to manage their own customization of the tool, enhances productivity and job satisfaction | Increased profitability |

**Annum’s Integration Services**

Bidirectional syncs facilitated through Annum’s partnership with Workato, the leading enterprise-grade intelligent integration and automation solution, automate workflow from planning to execution. [Workato’s list of connectors](https://www.workato.com/integrations)

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| **Benefit** | **As a Result** | **Business Impact** |
| Eliminates redundant work of double data entry between the marketing plan and project management tools | Lifts productivity, job satisfaction, employee retention | Increased profitability |
| Eliminates the possibility of transcription errors | Improves accuracy of plans | Increased revenue |
| Omnichannel marketing plan is always up to date via automatic aggregation of channel plans | Streamlines communication and accurate information fuels better decision making | Increased profitabilityIncreased revenue |
| Team members can work in their preferred tools | Enhances productivity, job satisfaction, employee retention | Increased profitability |
| Breaks down data silos | Keeps teams aligned and fuels better decision making | Increased revenue |
| Results in a fully complete historical plan of record | Gives teams the ability to assess performance against everything that was in market so they can learn, adapt, and optimize cross-channel plans | Increased profitabilityIncreased revenue |

You’re already marketing across multiple channels.

To drive more revenue, these channels need to work together

to advance the customer journey.

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G2 Reviews - [5.0 out of 5 stars](https://www.g2.com/products/annum-integrated-marketing-planning-calendar/reviews)

Capterra Reviews [5.0 out of 5 stars](https://www.capterra.com/p/251290/Annum/#reviews)

“Annum has allowed the team to move from clunky excel spreadsheets to a tool that illuminates not only our goals and objectives but allows us to illustrate our actions proactively out to our cross-functional partners. Annum is giving us the ability to harness the overall business objectives and strategically plan our marketing initiatives to ensure we're not 'marketing for the sake of marketing' - but ultimately, developing actions that resonate with consumers in achieving our business goals and objectives.” - Joe, G2 review

“Annum allows various teams to quickly see what everyone is working on, how things can be leveraged across channels and platforms, and what goals are being met by each element of the integrated marketing plan.” - Mariana, Capterra review

“As a CPG company with 3 sales channels, we work with multiple agencies and freelancers to support our marketing needs. Annum allows us to centralize the tactics for better planning. Now, we are able to control the projects in-house v. multiple Gantts or boards controlled by our outsource partners. They feed into our platform (Annum).” - Brian, G2 review

“Annum has helped our team manage our content workflow and increased our efficiency! We primarily use the tool for channel planning, and I particularly appreciate the features that allow the team to sort and adjust the view. I cannot recommend Annum enough - and bonus, the smart team behind this tool provides top notch customer support with impressively short response times.”- Lesa, Capterra review

“There isn't another tool on the market that tops it and does what you need. We like how it's pre-built for marketers (with channels, campaigns, tactics), easy to use, color coordinated, and customizable. The several views help our multiple stakeholders get the exact view they are looking for and help them understand our campaigns and objectives. It's been essential to our marketing success!” - Ashley, Capterra review

“If you're looking for a tool to provide organization and clarity to your cross-functional marketing team, Annum provides that exact solution. Have instant visibility across teams, track campaigns and improve line of sight for collaborative projects all in one place.” Gabby, G2 review

“Say goodbye to 20 spreadsheets, disjointed silos, and wasted time and money. This tool positions teams to work smarter, so they can move the needle in a big way.” - Lynn, G2 review

When social, email, and website messaging are at odds,
you look like you don’t know what you’re doing.

It fractures customer trust in your brand and derails prospects on the path to purchase.

**SOLUTIONS EVALUATED**

Annum’s [Comparison of the “Best Marketing Calendar Software” on G2](https://www.annumplanning.com/wp-content/uploads/2024/02/Comparison-of-G2s-Best-Marketing-Calendar-Software-V6.pdf)

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| **Tool** | **Demo** | **Trial** | **Pros** | **Cons** |
| [Name] | X | X |  |  |
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# 5-POINT PLAN TO BECOMING MORE CUSTOMER-CENTRIC

Getting everyone and everything on the same page is the first step in smashing organizational silos and transitioning from a channel-centric approach to planning to an omnichannel customer-centric practice.

1. Implement integrated omnichannel planning software
2. Hold monthly integrated planning meetings dedicated to optimizing the omnichannel customer experience
3. Identify weak links in the customer journey
4. Establish prioritized cross-channel and departmental marketing objectives
5. Create and execute a strategic content plan that shores up the weak links and advances the customer journey from awareness through purchase to brand advocacy

This approach is detailed in Annum’s [5 Point Guide to Smashing Organizational Silos](https://www.annumplanning.com/organizational-silos/)

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# RISKS INVOLVED WITH STICKING TO THE STATUS QUO

When teams maintain a siloed, channel-centric approach to planning, brands risk:

* Inefficient resource allocation
* Disjointed and clashing customer experiences
* Erosion of brand trust
* Missed growth opportunities