

CFAM4.3.2

Develop direct marketing plans



Overview

This is about developing direct marketing plans and associated budgets. It includes establishing and coordinating the messages to be communicated, agreeing the direct marketing media to be used, and piloting campaigns where required.

This unit is recommended for marketers with responsibility for developing plans towards the implementation of a direct marketing strategy. Such marketers might be employed directly by an organisation involved in direct marketing to their customers, or work for an agency/consultancy.

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Performance criteria

- You must be able to:*
- P1 identify and prioritise direct marketing objectives consistent with the agreed direct marketing strategy
 - P2 define the needs and characteristics of target customers
 - P3 interrogate the existing customer database to locate good potential customers and to identify those existing customers where long-term business relationships are to be fostered
 - P4 identify opportunities for tailoring products/services, and also the direct marketing communications, to address particular needs and characteristics of target customers
 - P5 evaluate potential marketing tools, channels and techniques and identify those best suited to achieve the objectives, and to address the needs of target customers taking into account costs, benefits and the calculated return on investment required
 - P6 identify and agree the preferred tools and techniques, and determine the actions required to realise the direct marketing objectives
 - P7 identify any relevant test plans and their objectives
 - P8 assess and identify the resources required to achieve the actions within an agreed timescale, determining where particular resources may need to be sourced from a third party supplier(s)
 - P9 prepare and agree implementation plans which set out clearly the agreed actions, timescale and budget for achieving the objectives
 - P10 identify and agree procedures for monitoring progress against agreed budgets and schedules
 - P11 ensure that the direct marketing plan is in line with all aspects of the organisation's marketing communications and satisfies all relevant legal, industry and organisational guidelines

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 what direct marketing is, as opposed to 'mass marketing', its relative benefits and limitations to organisations and their customers
- K2 the role of direct marketing within an integrated organisational marketing strategy
- K3 the principal direct marketing channels available, their relative merits, and the circumstances where organisations may prefer particular options
- K4 the importance of, and benefits to be derived from, a customer database for effective direct marketing
- K5 the topics to be covered in a direct marketing plan
- K6 how to identify potential risks in relation to achievement of the objectives
- K7 the importance of determining and demonstrating anticipated returns upon investment proposed, and of setting out a convincing justification in support of your case
- K8 the importance of consulting with colleagues and other stakeholders during the development of the plan, and how to do this effectively
- K9 how to develop measures and methods for monitoring and evaluating performance against the direct marketing plan
- K10 the public and ethical issues associated with direct marketing

You need to know and understand:

Industry/sector specific knowledge and understanding

- K11 legal, regulatory and ethical requirements in the organisation's sector
- K12 market developments in the organisation's sector

You need to know and understand:

Context specific knowledge and understanding

- K13 the market in which the organisation works
- K14 the organisation's actual and potential customer base, and the extent of its existing customer database
- K15 the needs and expectations of the organisation's actual and potential customers
- K16 the organisation's actual and potential competitors and partners, and the key features of their strategies and plans
- K17 new and available market opportunities
- K18 the organisation's selling process and how the direct marketing plan will support this
- K19 the extent of any existing direct marketing activities by the organisation including existing planning and implementation systems which may be required for the approval of direct marketing plans
- K20 colleagues and other key stakeholders, and their needs and expectations
- K21 processes for consultation within the organisation
- K22 source of information that can aid monitoring and

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Additional Information

Behaviours

1. You balance overall marketing objectives and the needs of others with those of the plan when allocating resources and responsibilities
2. You set demanding, but achievable objectives
3. You produce and test a variety of options before making a decision
4. You demonstrate behaviour which shows respect, helpfulness and understanding
5. You identify people's information needs
6. You listen actively, ask questions and clarify points to check mutual understanding
7. You encourage people to ask questions
8. You present information clearly, concisely and accurately

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