

# Ten Essential Steps of Marketing Planning

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## SUMMARY

The following 10 steps outline how to form a concise marketing plan to help firms achieve a higher level of business success. The terms goal, strategy, and tactic are defined.

## STEPS FOR MARKETING CONSISTENTLY

All architecture firms market, whether they have a formal marketing plan or not. Architects build relationships with their clients and seek a steady flow of projects in fulfillment of their practice goals. They pay attention to their clients' needs and find ways to meet new prospective clients.

Below is a list of 10 marketing planning steps. Most firms have already accomplished the first four, either deliberately or tacitly. Consistent application of all 10 can help you achieve a higher level of business success.

- 1. Determine the firm's mission.** Your mission statement reflects why your firm is in business, provides basic guidelines for further planning, and establishes broad parameters for the future.
- 2. Set company goals.** Goals define the overall results you wish to achieve, guide the development of a marketing plan, and shape the strategies needed to implement it.
- 3. Perform external analysis.** An external analysis examines trends in the marketplace, the local economic outlook, market types, available financing, and market needs.
- 4. Perform internal analysis.** An internal analysis looks at your firm's strengths and weaknesses. It should include a client review of your firm's performance.
- 5. Establish marketing goals.** Marketing goals should reflect what you think your firm can accomplish through marketing in the coming years: the amount of new business vs. old or repeat business, job and client profiles, and promotional and sales goals.

## 6. Define strategies to achieve your goals.

Strategies are specific activities to achieve stated marketing goals over two or three years. They range from pursuing a new type of client to expanding an existing market geographically or even adding or changing a specialty.

**7. Research and refine strategies.** Focus your energies as much as possible, selecting only those strategies that will make it possible to reach your goals.

**8. Create and refine promotional and sales tactics.** Tactics are short-term, immediate, planned actions undertaken to implement strategies. Tactics are specific reactions to research. Limit tactical planning to those tasks necessary to accomplish marketing goals.

**9. Implement the plan.** Once the plan is put into action, good coordination and record keeping are critical to its success.

**10. Evaluate the plan in action.** The entire marketing planning process must be continuously evaluated and updated. Conduct regular evaluations of your efforts to achieve your marketing goals, studying both successes and failures.

## GOALS, STRATEGIES, AND TACTICS

After reading the previous 10 steps it is important to understand what these terms mean for an architecture firm and see an example. Here are some brief definitions and examples of terms that clarify the author's vision of a goal, strategy, and tactic.

A *goal* is an end, a measurable state to be achieved within a specified time frame. A sample marketing goal is

"To increase our firm's revenues for private colleges and universities by 20 percent within three years. "

A *strategy* is a means by which a firm seeks to achieve one or more of its goals. A sample strategy to achieve the sample goal is

“To expand the services we offer existing university clients to include facilities management and project definition.”

A tactic is a specific short term action aimed at implementing one or more of the firm’s strategies. Two sample tactics the firm might select to implement the sample strategy are

“To develop a white paper describing the benefits of a post-occupancy evaluation. Obtain and publish testimonials from some of our past clients about what they have gained from these services. “

“To become active in newly formed educational facilities users group in our region: attend meetings, join our clients in offering tours of recently completed facilities, and/or place this group on our newsletter mailing list.”

However you define your goals, strategies, and tactics it is important to avoid meaningless generalizations such as these:

- “Our policy will be to lead the competition.”
- “We will offer a better product.”
- “We will get our image into the public eye.”
- “Our plan will increase sales.”
- “Our plan is to satisfy our customers.”

**Keywords**

- Practice
- Marketing
- Marketing plan

**RESOURCES**

**More Best Practices**

The following AIA Best Practices provide additional information related to this topic:

- 05.01.03 Measuring Marketing ROI
- 05.01.07 Make the Most of Your Marketing Materials
- 05.01.08 Marketing that Sets Your Firm Aside

**For More Information on This Topic**

See also “Marketing Planning and Strategies”, by Roger L. Pickar in *The Architect’s Handbook of Professional Practice*, 13th edition, Chapter 7, page 143.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at [bookstore@aia.org](mailto:bookstore@aia.org).



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