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COURSE BROCHURE

Marketing Strategy and Planning Training Course

16 – 20 August 2027
New York

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Ref: 1_48 **Date:** 16 – 20 August 2027 **Location:** New York **Fees:** 7900 GBP

Marketing Strategy and Planning is a 1-week training course for marketing, brand and product leads that ends with a working annual marketing plan each participant brings back to the team. Organisations now compete for attention across more channels and with more data than ever, so a clear strategy and a disciplined plan decide where budget and effort go. Jupiter Prime Training runs this course on marketing strategy and planning.

The Bigger Picture

Three forces shape marketing planning today: customers who move between digital and physical channels, executives who expect marketing to prove its return, and fast-changing markets that make last year's plan out of date. A team that plans well aligns spending with growth goals and earns the trust of finance and sales; a team that plans badly spreads budget thinly and struggles to explain results. The course rests on the SOSTAC model Situation, Objectives, Strategy, Tactics, Action, Control, PESTLE and SWOT analysis, segmentation, targeting and positioning STP, the Ansoff growth matrix and the extended marketing mix 7Ps.

Who Gains Most

- Those responsible for writing and owning the yearly marketing plan for a business unit or brand
- Those who manage a product or brand portfolio and decide where it should grow
- Those who allocate marketing budget across channels and campaigns
- Those who lead business development or sales and need marketing aligned with targets
- Those who brief agencies and internal teams on campaign priorities

Marketing teams gain most when the plan owner, a brand or product lead and the person who manages the budget attend together and build one shared plan.

Perspectives and Capabilities

By the end of the course, participants will be able to:

- Assess the market, competitors and customers with PESTLE and SWOT analysis — for the situation review that opens the plan
- Design segmentation, targeting and positioning choices — for decisions on which customers to serve first
- Align SMART marketing objectives and KPIs with business goals — for agreement with senior leadership and finance
- Weigh growth options with the Ansoff matrix and competitive strategy choices — for the strategic direction of the plan
- Apply the 7Ps to turn strategy into channel and campaign actions — for the teams that deliver the plan
- Communicate a budgeted plan with a measurement framework — for approval and quarterly reviews

Key Terms at a Glance

- Marketing strategy — the long-term choice of which customers to serve, with what value proposition, and how to win against competitors.
- Marketing plan — the document that turns the strategy into objectives, actions, budget, timings and responsibilities for a set period.
- SOSTAC — a planning model in six stages: Situation, Objectives, Strategy, Tactics, Action and Control.
- Positioning — the distinct place a brand or product aims to hold in target customers' minds compared with competitors.
- Marketing KPI — a measure that shows whether marketing activity is moving the business towards an agreed objective.

Course Journey

Day 1: The Market and the Customer

- SOSTAC Planning Model — Structure for the Annual Marketing Plan
- PESTLE Analysis — External Forces Affecting Demand and Growth
- Competitor Analysis — Where Rivals Are Strong and Exposed
- Customer Insight and Buyer Behaviour — What Drives Purchase Decisions
- SWOT Analysis — Turning Findings into Strategic Priorities

Team takeaway: a shared situation analysis that every member can use as the starting point of the plan.

Day 2: Choosing Where to Compete

- Market Segmentation Methods — Grouping Customers by Needs and Value
- Target Segment Selection — Weighing Attractiveness Against Capability
- Positioning Statements — Defining the Brand's Distinct Place
- Value Proposition Design — Matching Offer to Customer Problems
- Ansoff Growth Matrix — Choosing Between Markets and Products

Team takeaway: an agreed list of priority segments with a positioning statement for each.

Day 3: From Objectives to the Marketing Mix

- SMART Marketing Objectives — Linking Marketing Goals to Business Targets
- Porter's Generic Strategies — Cost, Differentiation or Focus Choices
- Extended Marketing Mix 7Ps — Product, Price, Place, Promotion and Service
- Pricing Strategy Options — Value, Margin and Competitive Response
- Integrated Channel Planning — Combining Digital and Offline Touchpoints

Team takeaway: objectives and a marketing mix outline the whole team can test against its own activities.

Day 4: Budget, Resources and Measurement

- Marketing Budget Methods — Objective-and-Task Versus Percentage of Sales
- Resource and Agency Planning — Who Delivers Each Activity
- Marketing KPI Framework — Measures for Awareness, Leads and Revenue
- Marketing ROI Analysis — Comparing Return Across Channels and Campaigns
- Dashboard and Review Cycle — Tracking Results and Adjusting Spend

Team takeaway: a draft budget and a KPI dashboard that link every activity to a measure.

Day 5: Building the Annual Marketing Plan

- Action Planning and Timelines — Turning Tactics into Owned Tasks
- Risk and Contingency Planning — Preparing for Market Changes
- Situation and Strategy Review — Checking the Plan Against Day One Findings
- Plan Presentation to Leadership — Securing Approval for Budget and Priorities
- Annual Marketing Plan Assembly — Completing the Team's Working Plan

Team takeaway: a complete annual marketing plan ready to share, present and put into action.

Putting It to Work Together

The following are suggested activities a participant can lead in the first month back.

- Run a two-hour workshop where the team reviews the annual marketing plan and agrees owners for each action.
- Present the plan's objectives, budget and KPI dashboard to finance and sales leaders to secure shared targets.
- Set up a monthly review that compares results in the annual marketing plan with the KPI dashboard and adjusts spend.

Questions Leaders Ask FAQ

What is marketing strategy and planning, and why does it matter to a team now?

Marketing strategy and planning is the process of choosing which customers to serve and turning that choice into a budgeted, measurable plan. It matters now because channels and data have multiplied, and teams that plan clearly spend more wisely and can show what marketing returns.

Which team members gain most from marketing strategy and planning training?

Plan owners, brand and product leads and budget holders gain most from marketing strategy and planning training. They are the people who decide priorities, allocate spending and report results, so a shared method helps them agree faster and plan as one team.

How is a marketing strategy and planning course different from a digital marketing course?

A marketing strategy and planning course decides where and how to compete before any channel is chosen. A digital marketing course focuses on running specific online channels and campaigns. This core course builds the plan that later guides those channel and campaign decisions.

What does the team receive after marketing strategy and planning training?

The team receives a complete annual marketing plan, built during the course, with a situation analysis, target segments, objectives, a marketing mix, a budget and a KPI dashboard. You can use it straight away to agree priorities and review results.

A Clearer Way Forward

The annual marketing plan participants build gives the team a single reference for its next budget round. The first decision it informs is which segments and channels receive investment this year. Plan owners, brand leads and budget holders use it together, and the positioning choices are worth revisiting after the first quarter's results are in.