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Gartner for Marketers

Ignition Guide: Scenario Planning for Marketing



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Overview

CMOs can use this step-by-step Gartner Ignition Guide to:

- Identify the impact of different corporate scenarios on the marketing function
- Plan for changes to the function's current strategy and initiatives
- Communicate the scenario-specific actions

This guide is tailor-made for short-cycle projects that take between a few weeks to a month to execute and may not require extensive planning to get started or monitoring after launch.

Before you begin, use the Corporate Scenarios Template on the next page to share the corporate scenario planning exercise results with your marketing leaders and kick-start functional scenario planning. Then, you can establish timelines for conducting the functional scenario planning process.

Scenario Storyline Template

Fill in the Corporate Scenarios Template below to help complete your scenario planning exercise.

1 Scenario Title

Retain the title from the corporate scenario planning exercise to ensure consistency.

4 Actors

List the names of all the actors in the scenario and their roles.

2 Scenario Narrative

Briefly outline the details of the scenario as outlined in the corporate scenario planning exercise.

5 What Happens

List all the actions and reactions the actors might undertake. How will they interact with each other in the scenario?

3 Time Horizon and Location

Describe the geography and time horizon of the scenario.

6 Business Implications

List all the business implications of the scenario occurring.

Step A:
Identify implications of corporate scenarios for the marketing function



Step A

Identify implications of corporate scenarios for the marketing function

Determine implications of corporate scenarios for the marketing strategy.

Task A1 **Establish the scenario planning team**

Select a team that brings together individuals from all relevant stakeholder groups within the marketing function (that is, customer experience leader, market insights leader, multichannel marketing leader, digital commerce leader, marketing technology leader, cross-functional peers, etc.) and the in-house team representing third-party vendors to lead the scenario planning exercise.

Then, ask the team to review the corporate planning scenarios as prework.



Gartner advice

Invite representatives from other corporate functions and trusted third-party service providers, like marketing agencies and vendors, to provide their insights and experience. Diversity of participants often brings in various perspectives that reveal interdependencies and domino effects across the marketing function.

Step A

Figure 1. Gather multiple perspectives to cascade corporate scenarios

Cross-functional leaders (strategy, finance, IT, HR)

“To mitigate the impact of cross-functional dependency, we will have to ...”

Multichannel marketing leader

“During scenario X we can drive customer retention by focusing on specific channels ...”

Digital commerce leader

“Scenario X will create a greater impetus to drive more sales from online channels, reducing selling costs ...”

Marketing insights leader

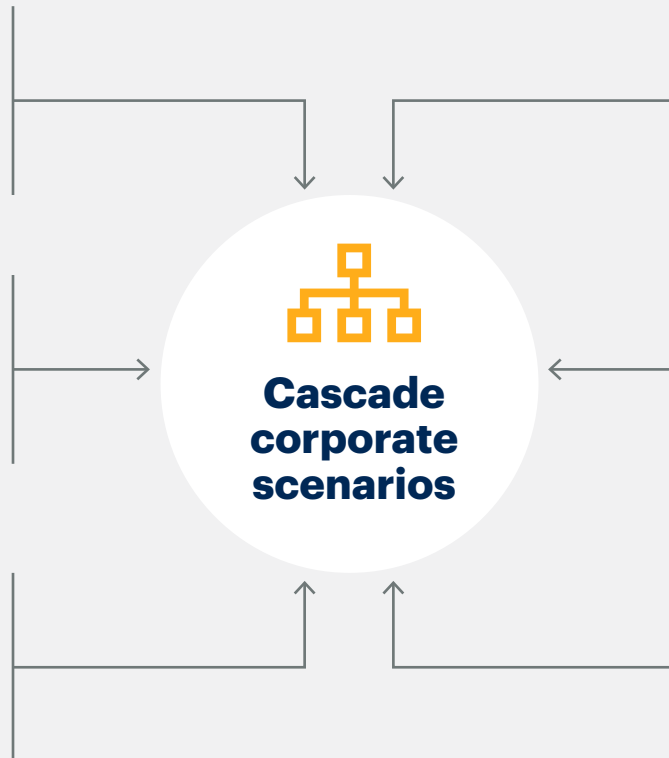
“Scenario X will have an adverse impact on competition in the market ...”

CMO

“Based on the budget and resourcing availability, the following mitigation and actions would be feasible ...”

Customer experience leader

“Scenario X is likely to negatively impact customer satisfaction. We need to ...”



Source: Gartner

Step A

Task A2 ← ESSENTIAL

Determine scenario implications for the marketing function

Identify the implications of each corporate scenario — both strategic and operational — in terms of impact on strategy (i.e., what should be prioritized in terms of marketing support) and operational plans (i.e., how to efficiently match marketing services to demand in different scenarios).

Task A3

Prioritize the implications to consider for each scenario

Rate the possible implications of a scenario on their likelihood, the degree of impact and the speed at which it might impact (i.e., velocity) to prioritize the critical ones.

Task A4 ← ESSENTIAL

Outline the risks and opportunities of each scenario

Review scenario implications to identify risk and opportunities that can materialize for the marketing function.



Gartner advice

Evaluating and prioritizing implications through a “velocity lens” ensures action plans are timely and impactful. Without considering the speed at which a scenario might impact, the scenario planning team may propose changes with extended lag times that are misaligned to the timing of scenario impact.

Step B:
**Outline actions that
address risks and
capture opportunities
of each scenario**



Step B

Outline actions that address risks and capture opportunities of each scenario

Figure 2. Adjust strategy and goals for each scenario

Scenario

A tariff-free trade agreement cannot be reached between the U.K. and the EU.



Adjusting strategy for scenario

- Adjust budget and revenue expectations, reflecting the reduction of expected trade between the U.K. and the EU.



Adjusting goals for scenario

- Decrease marketing budget by 20%.
- Increase market penetration outside the EU by 10%.



Actions to take

- Reduce marketing activation within the EU.
- Focus customer acquisition efforts in markets XXX and YYY outside the EU.

Source: Gartner

Step B

Task B1 ← ESSENTIAL

Determine actions for the most likely and impactful scenarios

Based on the implications, risks and opportunities identified in the previous step for each critical scenario, adjust marketing strategy and goals to outline actions (i.e., strategic decisions and operational plans) that the marketing team should execute in the short term and long term.

Task B2 ← ESSENTIAL

Create a mechanism to monitor corporate scenario triggers

Capture and monitor triggers identified for each corporate scenario during the corporate scenario planning exercise and share the business performance indicators that other functional and business leaders should monitor.



Gartner advice

Create a marketing early warning dashboard by adopting data-proven business performance indicators and align similar indicators with strategy, finance, HR and other critical functions to establish an enterprisewide predictor dashboard.

Step C:
**Document and
communicate the
action plan**



Step C

Document and communicate the action plan

Using the following two tasks, you can input and effectively communicate the actions to undertake for the most impactful and likely scenarios to the team, ensuring they can act confidently when scenarios occur.

Task C1 ← ESSENTIAL

Document the actions associated with each scenario

Document actions to deploy under different corporate scenarios to create a future-proof marketing strategy.



Gartner advice

Marketing leaders can make the scenario planning exercise pragmatic by leading their teams to define actions the team must either start or stop doing right now to prepare for future scenarios. Also assign action items (for example, improve the quality of digital interactions for attracting prospective customers from a high-segment market) to specific staff members in the action plan.

Step C

Marketing actions to address implications of the scenario

Fill in this Marketing Action Plan template to help complete this task.

Criticality of implications for finance function	Implications	Action plan	Proposed owner	Deadline and cadence for tracking progress	Key deliverable	Success metrics
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Step C

Task C2

Communicate the scenario plan to the marketing team

Create a compelling summary to effectively communicate the key details of the action plan to the marketing team. Tailor your message to build commitment and gain buy-in from different employee segments.



Gartner advice

Assess the influence and resistance of key stakeholders and employ the appropriate communication method to inform, reassure or persuade them based on their needs.

Step C

Figure 3. Narrative creation guidelines

Consider these questions as you create a comprehensive narrative for staff members that explains the rationale behind the chosen business strategy and the urgency to act on it.

What

is the change in strategy? What does this mean for our team? What will be the cost of inaction?

Why

has XXX strategy been chosen over YYY?

How

will the changes and new strategy be implemented?

Source: Gartner

When

will the initiatives be implemented? Will there be any near-term changes or will it take place over a period of time?

What are the obvious next steps?

What should be the goal or outcome of our discussion?

Step C

Review your performance

To further improve the scenario planning process, review your performance by:

- Gathering feedback from the team
- Updating the business performance triggers as you continue monitoring the events for long-term scenarios



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