

12.5: Steps in the IMC Planning Process

Learning Objectives

By the end of this section, you will be able to

- List the steps in the IMC planning process.
- Summarize the details of each step in IMC planning.

Identify the Target Audience

All successful IMC campaigns start with a good foundation and a carefully written and executed plan. Every step in the marketing process should be driven by research; the same is true for the IMC planning process (see Figure 12.9).

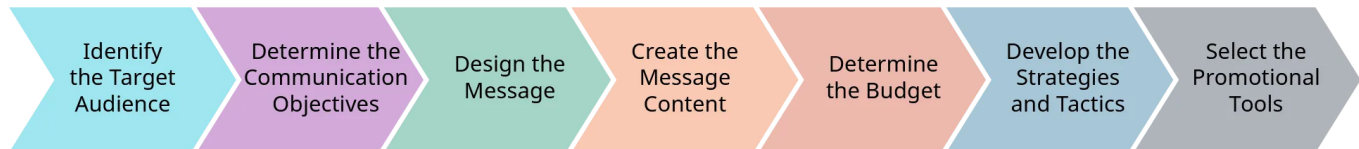


Figure 12.9 The IMC Planning Process (CC BY 4.0; Rice University & OpenStax)

Understanding the audience is integral to creating an effective IMC campaign. Using a variety of tools, marketers can identify the target audience. The more that is known about the target audience, the higher the likelihood is of making sure the message is coded correctly and the right medium for effective encoding and reduced noise is chosen.

Marketers employ many tools to understand the target audience. Both primary and secondary marketing research can provide significant insights. A clear understanding of the consumer allows the marketer to create messages that resonate with the needs and wants of the target audience.

Determine the Marketing Communications Objectives

Marketing campaigns must start with clear objectives. Objectives define what needs to be done, and they help to keep the strategy and tactics clearly aligned. Good objectives will help marketers create cohesive messaging across all the promotional mix methods. Objectives need to be simple and should be written in such a way that they provide opportunity for analysis. If done correctly, marketers should be able to analyze if the messaging and the medium are working. When creating objectives, follow the SMART guidelines: simple, measurable, actionable, realistic, and time-bound.

The 5A Framework

The 5A framework is the map of the customer's needs. Through the 5A framework (see Figure 12.10), marketers create messaging that moves the customer through the funnel or customer journey with the brand. The 5As provide the marketer with clear steps on the role of the messaging at each step of the framework.

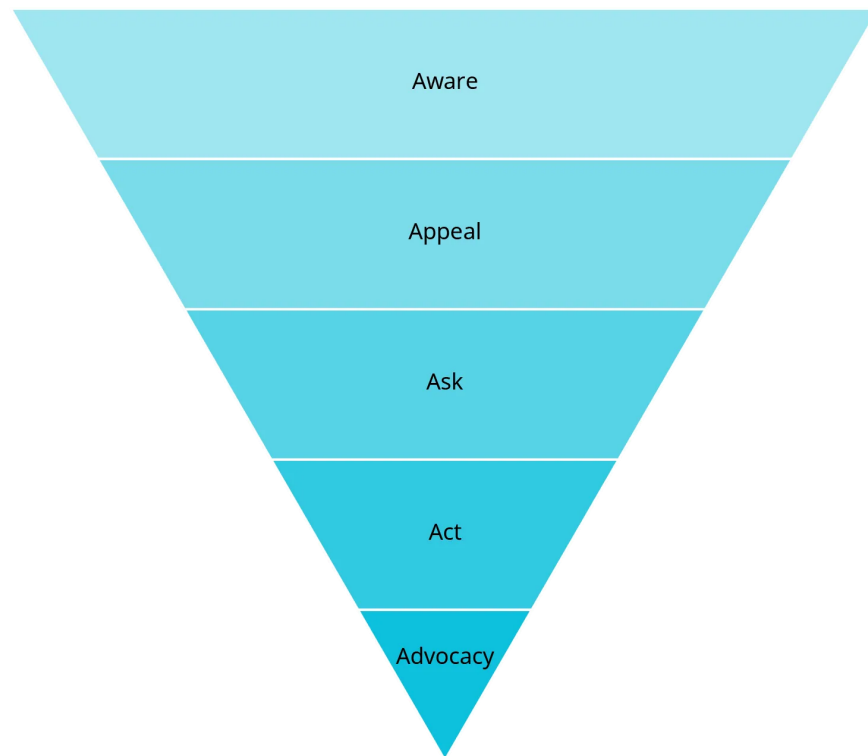


Figure 12.10 The 5A Framework (CC BY 4.0; Rice University & OpenStax)

Let's look at the five steps of the 5A framework in more detail:

- **Aware:** The first stage in the customer journey with any product is to be aware that the product exists. It is difficult for a product to be desired by the customer if they don't know about it.

When Angel Johnson launched her activewear company ICONI, she needed to stand out from more popular and well-funded activewear brands. As a Black woman-owned business, Angel wanted to appeal to other women, many of whom needed different types of activewear. Angel successfully created awareness by running ads on Amazon, where customers could easily find and purchase her products (Miller, 2022).

- **Appeal:** After becoming aware that a product exists, the consumer must understand what it can do for them. If the benefits are favorable for the consumer, they may put it in their consideration set of things that appeal to them.
- **Ask:** After the appeal stage, the consumer may become motivated to actively seek out information about the product. When the consumer asks the company about the product, they have opened the channels of communication. This is part of the feedback

loop. Methods of asking include the consumer engaging online through a chatbot or a contact form or by calling a listed phone number.

- **Act:** Further down the customer journey funnel, if the customer has received information and they feel it is favorable, then they will act. The action can be to either purchase the product or not purchase the product. The marketing team must evaluate either form of action. The marketer can determine if the messaging created a favorable or unfavorable reaction and then modify the messaging for the segment that acted not to buy the product.
- **Advocacy:** At the bottom of the funnel is the marketer's holy grail—the consumer becomes a loyal customer. The marketer can begin to calculate lifetime value, but most importantly, the consumer becomes an advocate for the product. Through their advocacy, the consumer provides positive word of mouth and encourages other consumers' purchases.

Design the Message

A key element of integrated marketing communications is creating the message. Messages are designed to fulfill the established objectives. Depending upon the objective and the desired action of the consumer, the marketer may create the message to meet the various stages in the customer journey and have a call to action.

The biggest part of the message design is the content of the message. To move the consumer to the point where they act, marketers have at their disposal various forms of appeal. The appeal is the approach used to attract the attention of the target audience or persuade them to take action.

Create the Message Content

When creating the message, the marketer has to consider not only the stage of the customer journey, but the product's features and benefits as well. Other factors to consider in the message content include the media and the traits and characteristics of the target market. All of the segmentation bases should be considered when creating the appeal.

Rational Appeals

When Toyota advertises the features of alternative-fuel vehicles and tells the consumer how those features benefit them, it is creating a rational appeal (see Figure 12.11). Rational appeals prompt the consumer to choose the product based on all the ways they will benefit from using it.



Figure 12.11 IMC messages that appeal to a consumer's rational side, like Toyota's alternative fuel vehicle, speak to the benefits the consumer will see from using the product or service. (credit: "Another Breakfast at Buck's" by Jurvetson/flickr, CC BY 2.0)

Emotional Appeals

Consumers have a wide variety of emotions. Advertising messages can play to all those emotions. Some typical emotional appeals include happiness, fear, trust, sadness, anger, and guilt. It can be quite effective to create fear if the customer doesn't purchase the product. Some examples of common fear appeals include skin care products and the fear of the effects of aging on the skin. Vitamins and supplements use the fear of being unhealthy. And automobiles promote the fear of not being safe in a crash unless you drive a certain brand with a good crash-test rating.

Link to Learning: Happiness Campaign

Coca-Cola (see Figure 12.12) wanted to associate drinking a Coke with being happy and created a whole campaign on the emotion of happiness. Everything in the campaign was focused on drinking Coke and choosing to be happy. They created the #choosehappiness hashtag to be used in their social and digital promotions. Consumers would include their pictures drinking a Coke with friends and add #choosehappiness. Check out this commercial from the campaign.

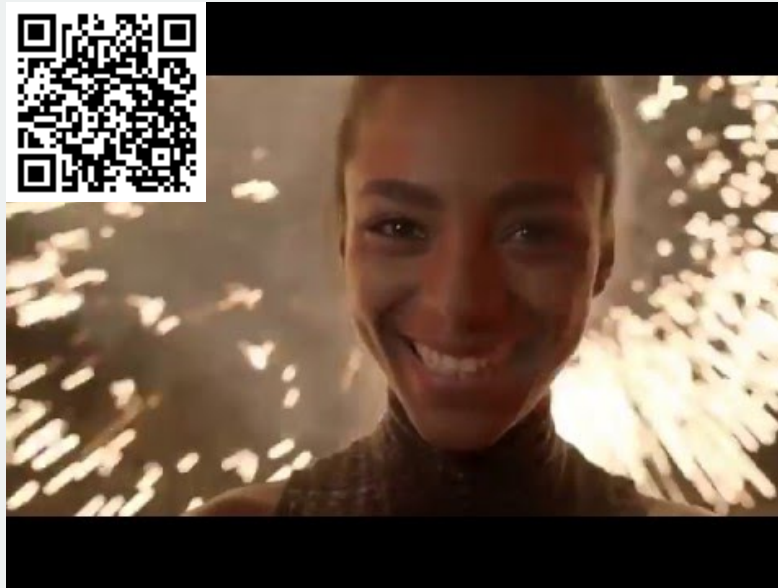


Figure 12.12 IMC messages that speak to a consumer's emotional side, like Coca-Cola's "Happiness" campaign, influence purchasing behavior by playing to consumers' wide variety of emotions. (credit: "Coca Cola" by JeepersMedia/flickr, CC BY 2.0)

Public health campaigns often rely on fear appeals (see Figure 12.13). If you continue a behavior, there may well be negative consequences, which can arouse fear in the consumer. These campaigns seek to change behavior through fear. Fear appeals can be very effective in some circumstances.



(a)



(b)



(c)

Figure 12.13 IMC messages that speak to consumers' fears create a sense of panic that if the message isn't heeded, something bad may happen. (credit: "Cancer Take Warning" by Archives New Zealand's health poster collection, transferred by the Department of Health/Railways Studios/Archives New Zealand/flickr, CC BY 2.0; "Knocked Flat by a Sneeze" by Archives New Zealand's health poster collection, transferred by the Department of Health/Archives New Zealand/flickr, CC BY 2.0; "How Many Cigarettes a Day Does Your Child Smoke?" by Archives New Zealand's health poster collection, transferred by the Department of Health/Archives New Zealand/flickr, CC BY 2.0)

Moral Appeals

A moral appeal pushes the consumer to want the product because of a sense of morality or social good (see Figure 12.14). The messaging may encourage the consumer to do the "right thing." If they don't do what is being asked of them, the situation will get worse.



Figure 12.14 Messages based on morals encourage consumers to do what is considered right. (credit: "Beer Bottle Chained with Handcuffs and Don't Drink and Drive Text" by Marco Verch/flickr, CC BY 2.0)

Message Structure

Promotional messages generally have common elements, which include a slogan, the text or content, and the graphics. The graphics can include photos and brand identification. Messages can tell stories with words or lead the audience to their own conclusion based on the graphics.

When Apple first promoted its iPod, the company used the imagery of a very colorful background, a completely black silhouette, and the stark contrast of the all-white iPod with white headphones. The graphic alone conveyed the message that the iPod would allow consumers to “jam” to their own tunes through this new device.

Message Format

The format of the message depends largely on the media being used to send the message. For example, a television ad combines sight and sound, while radio relies only on sound. The same is true for print, billboards, and various digital campaigns. Formatting the message needs to take into consideration the target market as well as the medium of the message.

Determine the Budget

Promotional budgets are determined based on many variables. In developing the promotional budget, it is important to consider where the consumer is in their journey. Additional considerations include the current level of brand awareness for the product, accessibility of the target market, creation of the promotion, and specific media under consideration. There are several commonly used methods of creating promotional budgets.

- **Objective and Task:** This is perhaps the best method but is often used the least. With objective and task, the marketer determines the objectives of the IMC campaign and what tasks need to be done to complete the objectives. The tasks are priced, and the level of reach (the number of consumers who will see the message) and the frequency (the number of times the consumer will see the message) are estimated. The budget is established based on the tasks necessary to achieve the campaign objectives.
- **Top Down:** With a top-down budgeting approach, the IMC campaign budget is issued from the operating budget based on input from the executives responsible for setting the budgets. While this method takes into consideration the overall organization, it pays little heed to the needs of the specific campaign.
- **Percent of Sales:** While personal selling is one of the methods included in the promotional mix, it is not the only method. A percent-of-sales approach attributes sales to all the functions of marketing. Generally, an organization may provide an arbitrary percentage of overall sales as the total budget for the marketing promotions. Because many issues affect the sale of a product, it is difficult to make sales the only determinant of the marketing activities and the promotional methods.
- **Affordable:** The affordable method allocates only the amount of money the company can provide to a marketing budget. This method does not create a mindset of growth within the organization. A robust marketing strategy is focused on the growth of the organization. Affordable only provides for what is left over after all the other expenses have been allocated.
- **Competitive Parity:** If you look at the advertising budgets of competitors in the same industry, you might very likely see that they are spending similar amounts on a very similar promotional mix. Companies of every size closely monitor the promotional activities of their competitors. With the competitive parity method of budgeting, the allocations essentially mirror whatever the closest competitor is spending on promotions. This method of budgeting doesn't allow for increased market share.

Develop Strategies and Tactics

The promotional strategies include the promotional methods the marketer chooses to achieve the objectives. Within the promotional methods, the tactics are the specifics the marketer must use to achieve the objectives. For example, if Panera Bread wants a 10% increase in brand awareness for its decorated Christmas sugar cookies from November 26 to December 30, it may choose to use the following strategy and corresponding tactics.

A strategy might be to create an Internet/digital messaging campaign focused on creating awareness with a message to try the Panera Christmas sugar cookies for a limited time. The tactics might then be developed as follows:

- Develop push ads through the Panera Bread mobile app
- Publish pop-up banner ads through Google
- Post campaign messages on Instagram
- Post campaign messages on Facebook

Select the Promotional Tools

The marketer must decide on the mix of promotional tools based on the established marketing objectives. Choosing the mix of promotional methods is also primarily dependent on the consumer and how best to reach them.

When Timmy Global Health, a not-for-profit organization, wanted to do an end-of-year fundraising ask, it chose to reach its donor base through direct mail. The organization chose an email campaign for the segment of its market that is responsive to email and

has an email address in the CRM system. For a small segment of its market, those who are older and not responsive to digital marketing, it chose to do a direct mail campaign with a postcard mailed through the US Postal Service (Timmy Global Health, 2024).

Link to Learning: Direct Mail Examples

There are hundreds of examples of companies using direct mail campaigns in their promotional mix. Check out some [of the best as referenced in this article](#).

Designing the Promotion

In considering the target market and the message to send, the marketer must think of the desired response. Three important issues arise in the design of the promotion: what to say (message), how to say it (creative), and who should say it (source). This leads the marketer to the overall message strategy, which will look at the appeal as it relates to the brand positioning. A marketer will consider the following in designing a promotion:

- **Message Strategy:** A good message strategy must tie the brand to the target audience. What will appeal to them? What action do you want them to take? How does the brand positioning need to be portrayed? The marketer may choose to highlight how the product compares to the competition (points of parity), or the marketer may choose to focus on how the product is different (points of difference). In doing so, it is important to showcase the product or service through the value it will bring to the target market. Ultimately, the customer wants to know, “What’s in it for me?”
- **Creative Strategy:** Through a creative strategy, the marketer can translate their message into words, images, and sounds. If the message and the creative do not match up, the communication objectives may miss their mark. The creative strategy helps the marketer cut through the clutter and get the target audience’s attention. A properly done creative strategy is the guiding principle for developing good content.
- **Communication Channel:** Think of the communication channel as the delivery mechanism, taking the message from the company to the consumer. Determining which channel is generally guided by the audience, the message, and the creative strategy. Channels can be non-personal or personal. The channel options are as varied as the consumers themselves.

Personal communication channels can include social networks like friends, family, and neighbors. They can also include paid or unpaid experts and even the company’s sales force. Non-personal communication channels include everything from television and radio to billboards and direct mail.

In designing the promotion, the marketer can mix and match the message, creative, and communication strategies until they have the right combination to execute on their objectives and connect with the target market.

For example, when World Food Championships wanted to reach home cooks, professional chefs, and aspiring chefs to participate in its Food Sport events, it enticed them with the opportunity for a big payout in winnings. And it created a connection with them through smaller local qualifying events. When the winners of smaller events received a Golden Ticket to compete, they were instantly excited. Then, they realized the competition would allow them to meet with even bigger food celebrities and increase their chances of television fame (see Figure 12.15).



Figure 12.15 Designing a promotion involves developing a strategy around message, creativity, and communication—an approach that was effectively implemented by the World Food Championships when it wanted to reach a wider variety of cooks. (credit: “Cookin’ with Gas (Oh Wait, That’s Induction...)” by Shrie Bradford Spangler/flickr, CC BY 2.0)

Scheduling the Promotion

Knowing when and how often to promote is a critical juncture in the promotional process. For scheduling purposes, it is important to understand the complexity of the message and the medium or channel for delivery. If the average of 5,000 promotional messages a day is correct, the consumer will need to see a message many times to become aware and act. To move them down through the customer journey, the message has to cut through the clutter and stick.

Reach is the number of consumers exposed to the promotional message at any given time. Frequency is the number of times the consumer will be exposed to the message. Using the combination of reach times frequency, the marketer can determine the promotional schedule. Marketers typically work to create promotional schedules that optimize the exposure to the target market. Once again, we see that having extensive knowledge of the target market is critical to creating effective campaigns. There are three promotional schedules a marketer may consider:

- **Continuous:** With a continuous promotional schedule, the marketer will conduct the promotion year-round on a very regular schedule. Consumers will continuously see the ads.
- **Flighting:** Through a flighting promotional schedule, the marketer will run a period of heavy promotions and then go for a time without any promotional messaging. The idea is to give the target market a break and avoid potential wear-out of the message.

- **Pulsing:** If you see promotions regularly and then suddenly you see them a lot during certain seasons, the sender is using a pulsing schedule.

For example, let's consider the television commercial for MyPillow. Throughout a broadcast, the MyPillow commercial plays two or three times. The commercial plays every night on one broadcast station. However, during holiday seasons, the commercial plays more often. The commercial is often accompanied by a special code. With the code, viewers can receive a discount on the pillows. The viewer gets a discount, and MyPillow receives analytics to determine if its budget for this commercial television time is effective. In this example, MyPillow utilizes a pulsing schedule for its promotional efforts.

Evaluate and Measure the Objectives

Before starting a promotional campaign, marketers must establish objectives. Including measurable and time-bound objectives is important. The marketer must continually evaluate the campaign to ensure that every element in the campaign is working to achieve the objective. Continually measuring and evaluating the campaign allows the marketer to evaluate the elements and make changes. Typically, objectives also have financial accountability. Changing elements of a campaign avoids overspending on components that are not working to meet the objectives.

Some common key performance indicators (KPIs) for evaluating promotional campaigns include the following:

- return on investment
- cost per lead
- cost per sale
- conversion
- engagement

Digital promotional campaigns allow marketers to track many analytics in real time and have the ability to make changes to the campaign in real time. The advantages of digital media include a host of valuable analytics, such as the following:

- website traffic
- page views
- bounce rate
- conversion rate
- impressions
- cost per click

Marketing Dashboard: ROCI

IMC is centered on data-driven decision-making to drive organizational value. So, it's no surprise that the founder of IMC, Don Schultz, determined a way to measure IMC campaigns. Schultz calls this metric return on customer investment (ROCI). ROCI is a marginal analysis that shows the efficiency of marketing communications spending. We often consider effectiveness the key measure of a campaign's success. But equally important is the efficiency of how we spend resources. We should consider how hard our resources work for us.

We should also be concerned about how well our investment does in the short and long term. After all, we are trying to build financial returns for our organizations. ROCI looks at short- and long-term value by considering the change in profitability and value during the period and overall.

IMC considers all aspects of the marketing communications relationship, not just a single campaign. The ROCI metric looks at how revenue grows over time, not just in response to one action.

The formula for ROCI is as follows:

$$\text{ROCI} = \text{Profit from Customer in Current Period} + \frac{\text{Change in the Customer's Value in Period}}{\text{Period}}$$

Let's say we own an ice cream shop and are interested in the efficiency of our recent IMC campaign. So, we decide to conduct an ROCI calculation for an average customer using the following data. What is the ROCI?

Table 12.1

Profit from the customer in the current period	\$38.00
--	---------

Profit from the customer in the current period	\$38.00
Change in customer's value in the current period	\$10.00
Customer's value at the beginning of the period	\$21.00

Table 12.1

Answer

Solution

\$38.48

Last period, the ROCI was \$37.50. What factors might impact the change from the previous period to this period?

Answer

Solution

ROCI considers all aspects of the IMC relationship, so as the relationship grows, the ROCI does as well.

What is the value of the ROCI calculation?

Answer

Solution

It determines the marketing communication campaigns that yield the most profitable customers.

Link to Learning: Don Schultz

Hear from Dr. Schultz directly about IMC trends in this video.



Knowledge Check

It's time to check your knowledge on the concepts presented in this section. Refer to the Answer Key at the end of the book for feedback.

1.

The first step in the IMC planning process is _____.

- a. determine the objectives
- b. determine the budget
- c. identify the target audience
- d. select the promotional tools

2.

According to the 5A framework, when Jennifer uses the Panera Bread coupon sent through a text message to her mobile device, which stage of the customer journey is she in?

- a. Advocacy
- b. Aware
- c. Appeal
- d. Act

3.

When advertising is scheduled to run constantly without variation, this is referred to as _____.

- a. flighting
- b. continuity
- c. reach
- d. pulsing

4.

When Nestlé shows an advertisement that has children coming down the stairs on Christmas morning to the smell of freshly baked Nestlé Tollhouse chocolate chip cookies, this is an example of which method of message appeal?

- a. Rational
- b. Emotional
- c. Fear
- d. Moral

5.

The CFO for Wendy's tells the CMO that after doing the annual budget, there is only \$700,000 left for marketing promotions. Which form of budgeting is Wendy's using?

- a. Objective and task
- b. Competitive parity
- c. Affordable
- d. Percent of sales

This page titled [12.5: Steps in the IMC Planning Process](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by [Elisabeth Dellegrazie](#) via [source content](#) that was edited to the style and standards of the LibreTexts platform.

- [13.4: Steps in the IMC Planning Process](#) by OpenStax is licensed [CC BY 4.0](#). Original source: <https://openstax.org/details/books/principles-marketing>.