

MARKETING PLAN TEMPLATE

Comprehensive Market Analysis

Customers

1) Make a list of all your customers for the last three years.

- Sort your list by volume & look at the top 20%
- What do they have in common?
- What are the common themes?
- How can you capitalize on this knowledge?

2) Who is your most likely customer?

3) How are your most likely customers different from the rest of your customers?

4) What pain do they experience?

5) What events trigger the need or desire for your type of service or product?

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6) When does this trigger occur? Can it be predicted?

7) How do they go about deciding which vendor to use? Or which product or service to purchase?

8) What are their key decision factors?

9) Define three distinct customer prototypes.

1.

2.

3.

10) Thinking of these prototypes which segments are the most profitable (analyzing demographic information, such as geography, industry, customer size, order size, profile, etc.)?

- A Customers:

- B Customers:

- C Customers:

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11) Percentage (%) of new customers per year & percentage (%) of repeat customers per year.

_____ % New

_____ % Repeat

12) Which customers have the best potential for short-term sales? _____

13) Which customers have the best potential for producing profit? _____

14) Lost order analysis: list five (5) things that lead to lost orders

1) _____

2) _____

3) _____

4) _____

5) _____

Competition

15) How do you compare vs. the competition on customer decision factors?

16) Are these differences known to the customer? _____

17) Are these differences meaningful to the customer? _____

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18) What is your competition doing to steal customers away from you?

Trends

19) What emerging social, economic or technological trends can be turned into new sales opportunities?

20) What other environmental factors will affect your market, over which you have no control?

Exposure

21) How can your products and services be exposed to your most likely potential customers?

a. What do they read? _____

b. Where do they go? _____

c. Who do they listen to? _____

d. Who influences their choices? _____

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22) How can you make your products and services easier to use or buy?

Upselling

23) What other new products and services could you sell to your existing customers?

24) How can you sell more of your current products and services to existing customers?

25) What new markets could be served with a slight modification of your current products and services?

Potential Strategic Partners

26) What other non-competing companies in other industries also share the same target market?

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27) What can your suppliers do for you to improve your current products/services/ exposure / sales?

Past results

28) What current non-sales producing costs can be converted into sales producing investments?

29) What marketing produced profitable results in the last year?

30) What marketing worked partially well in the last year?

31) What marketing did not produce profitable results in the last year?

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32) Are there any standout reasons?

Pricing

33) What kind of image do you want to have (i.e., inexpensive but good, exclusive, eco-friendly, convenient, speed, quality, etc?)

34) What is your pricing strategy?

35) Are your prices in line with your image?

36) Do your prices cover costs and leave a profit?

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Marketing Planning Questions

1) What are your current target markets?

2) What new markets will you target this year (i.e., geography, income, other demographics)?

3) What are the key marketing messages for your target markets?

- Emotional connections

- Headlines

- Benefits

- Value

- Offers

- Calls to action

- Other

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4) What message components need to be enhanced, concentrated and revised?

5) What new messaging will you use this year?

6) Based on your target markets, what marketing vehicles would be most effective for you to use this year? For example:

- | | |
|--|---|
| ☐ Advertising | ☐ Trade associations |
| ☐ Direct mail | ☐ Public relations |
| ☐ Email marketing | ☐ Media (print, TV, radio, billboards, etc.) |
| ☐ Social media | ☐ Public speaking |
| ☐ Internet presence (SEO) | ☐ Articles |
| ☐ Personal contacts | ☐ Events |
| ☐ Networking | ☐ Sponsorships |

7) What is the desired frequency for each vehicle and campaign?

8) What materials will you need for each method?

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9) Based on your methods and frequency, what is your budget for this year?

- Per method: _____
- Per target market: _____
- Per period of time _____

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Marketing Plan

Goals:

- _____
- _____
- _____
- _____
- _____

Strategies:

- _____
- _____
- _____
- _____
- _____

Key messages:

- _____
- _____
- _____
- _____
- _____

Methods:

- _____
- _____
- _____
- _____
- _____

Budget:

- _____
- _____
- _____
- _____
- _____

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Marketing Timeline

Take all of the information above into consideration and lay out the marketing initiatives and efforts on a monthly timeline, using a simple spreadsheet.

Example:

METHOD	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Advertising												
Direct Mail												
Events												
Sponsorships												
Networking												
PR												
Social Media												
Email Blasts												