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MARKETING PLAN TEMPLATE

I. MISSION STATEMENT

II.

II. PRODUCT/SERVICE DESCRIPTION

III. BUSINESS BRAND

IV. MARKETING GOALS AND OBJECTIVES

V. CUSTOMER DESCRIPTION

a. Demographic Profile
b. Target Market (conversation starter)

VI. RESOURCE REQUIREMENTS

a. Personnel
b. Technology
c. Finances

VII. MARKET SUMMARY

a. Market Research
b. Leadership
c. Market Share
d. Opportunities (consumer problems)
e. Competitive Advantage (convenience, follow up, accessibility, communication, knowledge, continuing education, business experience)
f. Competition
g. Product/Service Comparison and Positioning

h. **Consumer Promise (summarize benefit to customer)**
I. **Market Shifts**
j. **Costs**

VIII. MARKETING STRATEGIES

a. **Communication Strategies (marketing message)**
b. **Public Relations Strategy (timeline, major events, contingency)**
c. **Advertising Strategy (budget, timelines, media, metrics)**
d. **Service Strategies**
e. **Pipeline Strategies**
f. **Promotional Strategies (direct, indirect, budget, metrics)**
g. **Packaging Strategies (presentation, pricing, strategy, fulfillment)**
h. **Pricing Strategy (strategy, policies)**
i. **Distribution Strategy and Channels**

IX. SUCCESS METRICS (Sales, profit, volume, ROI – daily, weekly, monthly, annually)

X. MARKETING SCHEDULE (activity by timeline phase)

XI. **MARKETING BUDGET**