

## MARKETING PLAN TEMPLATE

- I. MISSION STATEMENT
- 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**