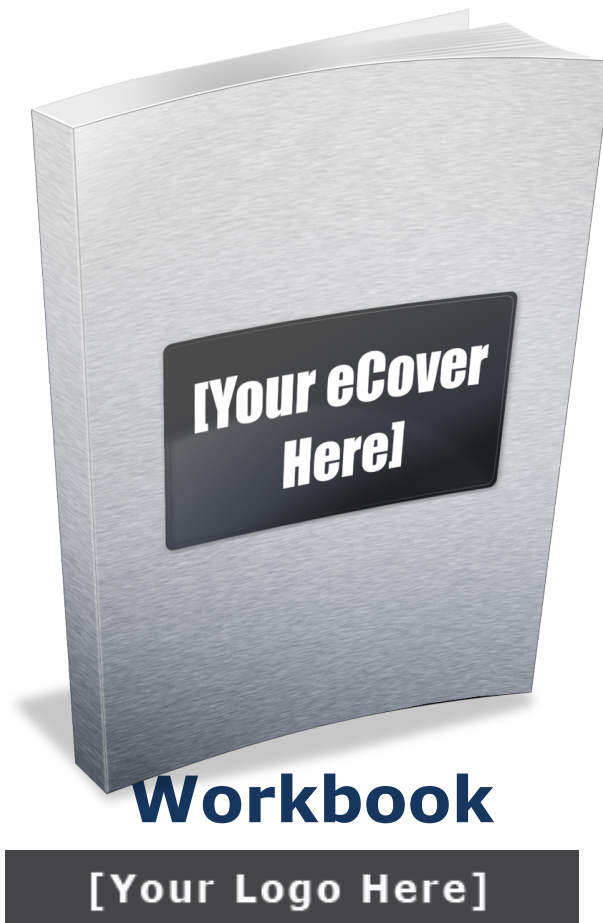


# How To Create Your Marketing Plan

A Step-By-Step Guide for Small Businesses and  
Entrepreneurs



## Table of Contents

Business Goals	2
Market Research	4
Company Description	10
SWOT Analysis	13
Marketing Goals	14

Track Your Marketing Results 15

Understanding the 4Ps of Marketing 16

Product Tactics 17

Price Tactics 20

Place Tactics 22

Promotion Tactics 24

One Year Marketing Plan Calendar 28

Initiative Action Plan #1 33

Initiative Action Plan #2 34

Initiative Action Plan #3 35

Initiative Action Plan #4 36

## Business Goals

Start your Marketing Plan by listing your long and short term business goals.

Short Term Goals		
Goal	Deadline	Notes


Long Term Goals		
Goal	Deadline	Notes

## Market Research

Keep track of your Primary and Secondary research sources and record your initial findings here.

### Primary Research Sources

---

**Customers**

Method	Date	Source

*Summary of research*

**Primary Research Sources**

**Competition**

Method	Date	Source

*Summary of research*

**Primary Research Sources**

**Environment**

Method	Date	Source

*Summary of research*

Secondary Research Sources		
Customers		
Method	Date	Source
<i>Summary of research</i>		



**Secondary Research Sources**

**Competition**

Method	Date	Source

*Summary of research*

## Secondary Research Sources

### Environment

Method	Date	Source

*Summary of research*

## Company Description

Start thinking about the details that describe your company.

Your Company Name

<http://www.YourWebsiteHere.com>

<b>Target Market</b>
<b>Who are they?</b>
<b>Where are they?</b>
<b>What do they need?</b>
<b>What problems do they face?</b>
<b>What do they buy?</b>
<b>Where do they buy it?</b>
<b>How often do they buy it?</b>
<b>How do they make buying decisions?</b>
<b>What is the best way to reach them?</b>

<b>Products and Services</b>
<b>Main Product/Service</b>
<b>What problem does it solve?</b>

**How is it different from other offerings?**

**What benefit does it offer to your customers?**

**Unique Value Proposition**

- *What is unique about your offering?*
- *What specific problem does your offering solve and how?*
- *What are the key benefits of your offering that no one else gives?*

*Write your UVP here*

## Mission Statement

- *Specific*
- *Concise*
- *Clear*
- *Exciting*

*Write your Mission Statement here*

## SWOT Analysis

Complete a SWOT analysis of your company and its market.

**Strengths**

**Weaknesses**

Your Company Name

<http://www.YourWebsiteHere.com>

<b>Opportunities</b>	<b>Threats</b>

## Marketing Goals

Identify your top 3 Marketing Goals then check them against the SMART criteria below

Marketing Goals
1.
2.

3.

### SMART Criteria

#### Specific

- *What?*
- *Why?*
- *Who?*
- *When?*
- *Where?*
- *Which?*

#### Measureable

- *How much?*
- *How many?*
- *How will I know?*

#### Achievable

- *What work will it take?*
- *What resources?*
- *Timeframe?*

#### Relevance

- *How will obtaining this objective help with moving forward towards business goals?*

#### Time-Bound

- *Time limit for steps*
- *Overall time limit*

## Track Your Marketing Results

For each of your top 3 marketing goals, determine how you will measure the results, including how often.

Marketing Goal	Method of tracking	Frequency
----------------	--------------------	-----------

---

<b>1.</b>		
<b>2.</b>		
<b>3.</b>		



# Understanding the 4Ps of Marketing

Start to think about your Product, Price, Place and Promotion by listing your current mix below.

## Product

*What is the offering you're making to your market?*

## Price

*What is the perceived value and how much are customers willing to pay?*

## Place

*Where will you place your product?*

## Promotion

*What promotional tactics will you use to spread awareness?*

# Product Tactics

Answer the following questions on Product Tactics (or service).

**What kind of product does your customer want?**

**What features do your customers want?**

**How will your customer use your product?**

**How big is your product?**

**What color and what shape is your product?**

**What are its functions and features?**

**What is the name of your product?**

**How is your product different from the offerings of your competitors?**

**How will you brand your product?**

**The tactics you intend to use**



# Price Tactics

Answer the following questions on Price Tactics.

**What is the customer's *perceived* value of your product?**

**What are other companies selling similar products for?**

**How do your customers feel about the price you're offering?**

**How do your customers feel about spending their money?**

**How will a small increase or decrease affect sales?**

**What discounts can you offer?**

**Can you undercut your competition without hurting your bottom**

---

**line?**

**Can you offer extra value to charge more for the product?**

**The tactics you intend to use**

--

## Place Tactics

Answer the following questions on Place Tactics. Remember, these can apply to both online and offline places and distribution methods.

**Where do people look for products such as yours?**

**What kind of store sells products such as yours?**

**What distribution channels do you need and how can you access them?**

**Do you need a sales force or intermediaries to help you sell?**

**Can you sell at trade fairs or other offline events?**

**Where are your competitors selling their products?**

---

**The tactics you intend to use**

--



# Promotion Tactics

Answer the following questions on Place Tactics.

**Can you reach your customers through traditional advertising channels such as TV, radio, or billboards?**

**Are there certain times of year when your customers are more likely to buy?**

**How do your competitors promote their products?**

**What ideas of your competitors' can you use?**

**How can you promote your products differently than your competitors?**

**Where can you find your customers offline?**

**Where can you find your customers online?**

<b>The tactics you intend to use</b>
<b>Email</b>
<b>Content Marketing</b>
<b>Social Media</b>
<b>Webinars</b>
<b>Events</b>
<b>Advertising</b>
<b>Special Promotions</b>

<b>Other Online Tactics</b>
<b>Other Offline Tactics</b>
<b>Other</b>

# One Year Marketing Plan Calendar

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter
<b>Goal #1</b>	<i>List your related marketing initiatives per quarter</i>		
<b>Goal #2</b>			
<b>Goal #3</b>			



	January	February	March
<b>Goal #1</b>	<i>Initiative</i>		
	<i>Timing</i>		
<b>Goal #2</b>			
<b>Goal #3</b>			
<b>Ongoing Activities</b>			
	April	May	June
<b>Goal #1</b>	<i>Initiative</i>		
	<i>Timing</i>		
<b>Goal #2</b>			

<b>Goal #3</b>			
<b>Ongoing Activities</b>			
	<b>July</b>	<b>August</b>	<b>Sept</b>
<b>Goal #1</b>	<i>Initiative</i>		
	<i>Timing</i>		
<b>Goal #2</b>			
<b>Goal #3</b>			
<b>Ongoing Activities</b>			
	<b>October</b>	<b>November</b>	<b>Dece</b>



<b>Goal #1</b>	<i>Initiative</i>		
	<i>Timing</i>		
<b>Goal #2</b>			
<b>Goal #3</b>			
<b>Ongoing Activities</b>			

**Initiative Action Plan #1**

<b>Tasks</b>	<b>Resources Needed</b>	<b>Responsibilities</b>
<i>Eg, Create webinar content</i>		


**Initiative Action Plan #2**

Tasks	Resources Needed	Responsibilities
<i>Eg, Create webinar content</i>		

**Initiative Action Plan #3**

Tasks	Resources Needed	Responsibilities
<i>Eg, Create webinar content</i>		

**Initiative Action Plan #4**

Tasks	Resources Needed	Responsibilities
<i>Eg, Create webinar content</i>		