

# Marketing Plan Toolkit

This **Marketing Plan Toolkit** has been developed by [www.yesimprint.com](http://www.yesimprint.com), the No. 1 source for innovative and cost-effective promotional products on the internet.

Copies of the latest version of this template and guide can be downloaded from [www.yesimprint.com/plan](http://www.yesimprint.com/plan).

If you need further information, please contact us on **1-800-655-6199**.

Last updated: January, 2012

## How to use this toolkit

Before you start using this marketing plan toolkit, consider the following:

1. **Do your research.** You will need to make quite a few decisions about your business including structure, marketing strategies and finances before you can complete the template. By having the right information to hand you also can be more accurate in your forecasts and analysis.
2. **Determine who the plan is for.** Does it have more than one purpose? Will it be used internally or will third parties be involved? Deciding the purpose of the plan can help you target your answers. If third parties are involved, find out what are they interested in.
3. **Do not attempt to fill in the template from start to finish.** First decide which sections are relevant for your business and set aside the sections that don't apply. You can always go back to the other sections later.
4. **Use the [*italicised text*].** The italicised text is there to help guide you by providing some more detailed questions you may like to answer when preparing your response. **Please note:** If a question does not apply to your circumstances it can be ignored.
5. **Use the Marketing Plan Toolkit.** The Marketing Plan Toolkit below contains general advice on marketing planning and a complete overview with details on each question asked in the marketing plan template.
6. **Get some help.** If you aren't confident in completing the plan yourself, you can enlist the help of a professional to look through your plan and provide you with advice.
7. **Write your summary last.** Use as few words as possible. You want to get to the point but not overlook important facts. This is your opportunity to sell yourself. But don't overdo it. You want third parties to quickly read your plan, find it realistic and be motivated by what they read.
8. **Review. Review. Review.** Your marketing plan is there to make a good impression. Errors will only detract from your professional image. So ask a number of impartial people to proofread your final plan.
9. **Print.** Before you print a copy of your completed marketing plan, ensure you delete the first section containing the guide as well as the [*italicised text*]. To print a copy, select the Printer icon on the toolbar, or select File then Print on the main menu.

# Marketing Plan Toolkit

## Marketing planning

A marketing plan assists you to integrate your total marketing effort. It ensures a systematic approach to developing products and services to meet and satisfy your customers' needs.

When you're writing a marketing plan you need to be clear about your objectives and how you'll achieve them. A good marketing plan sets clear, realistic and measurable objectives, includes deadlines, provides a budget and allocates responsibilities. A plan can consist of these elements:

- analysis of your current market
- your business objectives
- key strategies
- steps to achieving your objectives
- proposed budget
- timing.

Remember that your marketing plan should remain an ongoing process throughout the life of your business.

## Regular review

Marketing planning is an ongoing business activity. As your business changes many of the strategies in your plan will need to evolve to ensure your business is still heading in the right direction. Having your plan up to date can keep you focussed on where you are heading and ensure you are ready when you need it again.

## Attending business events

Small business workshops and seminars are run regularly in most countries, and deal with issues such as planning, marketing, innovation, employing staff and exporting.

You may also find it useful to attend networking events to help expand your business. By developing networks, you can keep up to date on industry and local information, promote your business through new contacts and learn key skills from other businesses.

## Taking on a mentor or business coach

Participating in mentoring or coaching programs can help you develop a greater understanding of business processes and practices, and equip you with the skills you need to grow and improve your business.

**[INSERT YOUR BUSINESS LOGO, ]**

If you don't have a logo yet or need to enhance it, get help from [www.yesimprint.com](http://www.yesimprint.com) to design a logo for you for free.

[*Your Name*]  
[*Your Title*]  
[*Business Name*]  
[*Main Business Address*]

[*Business Name*]

# Marketing Plan

Prepared: [*Date prepared*]

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# Marketing Plan Summary

**[Please complete this page last]**

[Your marketing summary should be completed last and should be no longer than a page focussing on why your business is going to be successful. Your answers below should briefly summarise your more detailed answers provided throughout the body of this plan.]

## The Business

**Business name:** [Enter your business name as registered in your state/territory. If you have not registered your business name, add your proposed business name.]

**Business structure:** [Sole trader, partnership, trust, company.]

**Business location:** [Main business location]

**Date established:** [The date you started trading.]

**Business owner(s):** [List all of the business owners.]

**Relevant owner experience:** [Briefly outline your experience and/or years in the industry and any major achievements/awards.]

**Products/services:** [What products/services are you selling? What is the anticipated demand for your products/services?]

## The Future

**Vision statement:**

[The vision statement briefly outlines your future plan for the business. It should state clearly what your overall goals for the business are.]

**Goals/objectives:**

[What are your short and long term goals? What activities will you undertake to meet them?]

## The Market

**Target market:**

[Who are you selling to? Why would they buy your products/services over others?]

**Marketing strategy:**

[How do you plan to enter the market? How do you intend to attract customers? How and why will this work?]

## The Finances

[Briefly outline your sales forecast. How much money will you need up-front? Where will you obtain these funds from? What portion of funds will you be seeking from other sources? How much of your own money are you contributing towards the business?]

# The Business

## Business overview

[Who are the current business owners? What products/services does the business provide? Where it is located? How long has it been operating?]

## S.W.O.T. analysis

[List each of your businesses Strengths, Weaknesses, Opportunities or Threats (S.W.O.T.) in the table below.]

Strengths	Weaknesses
Opportunities	Threats

## S.W.O.T. activity sheet

[Outline how and when you plan to address each of the weaknesses/threats from your S.W.O.T. analysis above.]

S.W.O.T weakness/ threat	Activity to address weakness/threat	Activity completion date

## Products/services

Product/Service	Description	Price
[Product/service name]	[Brief product/service description]	[Unit price including GST]

**Market position:** [Where do your products/services fit in the market? Are they high-end, competitive or budget? How does this compare to your competitors?]

**Unique selling position:** [How will your products/services succeed in the market where others may have failed? What gives your products/services the edge?]

**Anticipated demand:** [What is the anticipated quantity of products/services your customers are likely to purchase? For example, how much will an individual customer buy in 6 months or 12 months?]

**Pricing strategy:** [Do you have a particular pricing strategy? Why have you chosen this strategy?]

**Value to customer:** [How do your customers view your products/services? Are they a necessity, luxury or something in between?]

**Growth potential:** [What is the anticipated percentage growth of the product in the future? What will drive this growth?]

## Sales/marketing personnel

Job Title	Name	Responsibilities
[e.g. Marketing/ Sales Manager]	[Mr Chris Brantley]	[What are the main responsibilities of this position?]



## The Future

### Vision statement

*[What is your business' vision statement? It should briefly outline your future plan for the business and include your overall goals.]*

### Mission statement

*[What is your business' mission statement (i.e. how will you achieve your vision)?]*

### Goals/objectives

*[What are your short & long term goals? What activities will you undertake to meet these goals?]*

## The Market

### Unique selling position

*[How is your business unique in the market? What makes your business stand out from your competition?]*

### Your customers/clients

#### **Customer demographics**

*[Define who your target customers are and how they behave. You can include age, gender, social status, education and attitudes. What are their lifestyles, activities, values, needs, interests or opinions?]*

#### **Key customers**

*[Identify your key customers. (These can be large consumers of your products/services or individuals whose satisfaction is key to the success of your business.) How will you target your products/services to them?]*

#### **Customer management**

*[How will you maintain a good relationship with your customers? What techniques will you use? How will you keep your customers coming back? Have you introduced customer service standards? Do you follow any particular code of practice?]*

## Your competitors

[How do you rate against your competitors? How can your business improve on what they offer?]

### Competitor details

[List at least 5 competitors in the table below.]

Competitor	Established date	Size	Market share (%)	Value to customers	Strengths	Weaknesses
[Competitor name]	[When were they established?]	[Number of staff and/or turnover]	[Estimated percentage of market share]	[Unique value to customers, e.g. convenience, quality, price or service?]	[What are your competitor's main strengths?]	[What are your competitor's main weaknesses?]

## Market research

[What research have you completed to help you analyse your market? Did you use a survey/questionnaire? If so, you may like to attach a copy of your survey/questionnaire and findings to the back of this plan.]

## Market targets

[Outline your planned sales targets. What quantity of your products/services do you plan to sell in a planned timeframe? Are they monthly or yearly targets?]

## Environmental/industry analysis

[Detail the results of the market research you have performed. Is the area experiencing population growth? Are there long-term employers in the area? Is the region's economy stable? Are there seasonal variations? What is the size of the market? What recent trends have emerged in the market? What growth potential is available and where do you fit in? How will the market/customers change when you enter the market? What external factors will affect your customers?]

## Marketing strategy

[What is your overall marketing strategy? What steps or activities will you undertake to achieve your goals/objectives?]

Marketing activity/milestone	Person responsible	Date of expected completion	Cost (\$)	Success indicator
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social networking, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[Who is responsible for completing this task?]</i>	<i>[When do you expect to complete the marketing activity?]</i>	<i>[Estimated cost of activity.]</i>	<i>[What indicator/ measurement result will need to be met before this activity is considered a success?]</i>

## Advertising & sales

### Advertising and promotional strategy

Planned promotion /advertising type	Promotional strategy	Expected business improvement	Cost (\$)	Target date
<i>[Print media advertising, online advertising, SMS, mail-out, giveaway, media release or event.]</i>	<i>[Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this?]</i>	<i>[How do you expect it will improve your business success?]</i>	<i>[Estimated cost of activity.]</i>	<i>[e.g. Dec 09]</i>

### Sales strategy

[What sales techniques do you use? What are your strategies behind these techniques? How is this different/better than your competitors?]

### Sales and distribution channels

Channel type	Products/services	Percentage of sales (%)	Distribution strategy
<i>[e.g. Shopfront, internet, direct mail, export or wholesale.]</i>	<i>[List all the products/services sold via this channel]</i>	<i>[What percentage of overall sales do you expect to sell via this channel?]</i>	<i>[Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?]</i>

## The Finances

*[To complete the finances portion of this marketing plan, you should rely heavily on your financial statements and projections.]*

### Price

*[What price have you determined for your products/services? Does this price take into account all your costs including personal, start-up, operational, cash flow and working capital? Have you also allocated a profit margin in your costing?]*

### Expected sales

*[What are your expected sales? When do you hope to achieve these figures? Are there seasonal influences?]*

## Marketing budget [YEAR]

[Double-click the table below to enter your details or attach your own budget at the back of this business plan.]

Item	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Marketing/promotion</b>												
Radio advertising												
Television advertising												
Print advertising												
Online advertising												
Web search optimisation												
Mailouts												
Giveaways												
Events												
Branding & artwork												
Merchandising												
Publications												
Catalogues												
More...												
<b>Marketing/ promotion total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>												
Research												
Travel												
Postage												
Administration												
Incidentals												
More...												
<b>Other total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## Monitoring/measurement activities

[Reviewing the impact of your marketing should be a periodic activity. List the details of each review in the table below.]

Marketing activity	Date of review	Monitoring methods	Review outcomes
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social networking, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[e.g. Dec 10]</i>	<i>[What tools did you use to measure/monitor the impact of your marketing activities?]</i>	<i>[What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website?]</i>

## Supporting documentation

Attached is my supporting documentation in relation to this business plan. The attached documents include:

- *[List all of your attachments here. These may include resumes, customer survey/questionnaire and/or financial documents.]*