

My Company Name

MARKETING PLAN

Period

Date / Version



Navigation for this document

What is this document?

This document outlines the key elements of a marketing plan to help structure your thinking and document relevant points so you can communicate them clearly. It is designed to be a living document that evolves with the business.

Why is it in PowerPoint?

The purpose of a marketing plan is to communicate it and this is much easier to do with a presentation rather than a huge document. It is also easier to insert and remove sections for different audiences too!

How is it structured?

This document flows through the key elements of a marketing plan in a logical order – this is illustrated by the navigation graphic in the top right of the later slides to help you keep track of where you are.

What should I do with it?

Each component has slides with key things to think about documented in them. You can delete the italic 'prompt' text and replace it with the answers. Where one slide isn't enough, just insert new slides to make space.

What this document isn't

This document is not an exhaustive marketing plan and you may find that some elements need little work whilst others require you digging deeper.

Use it as a guide or aide memoir rather than a formula to be slavishly followed

It is designed to clarify and structure your thinking and enable you to communicate relevant parts of it within your business.

Executive Summary

This is the last section to be completed once all the others have been done.

Key points to understand from the rest of this document should be highlighted here:

- *What is the business selling*
- *Who it is selling to*
- *How will it compete with the competition*
- *What are the key financial projections and sensitivities*
- *What key metrics will be monitored to ensure that things are on track*
- *Key risks and sensitivities*

Contents

Side Number	Content
3	Executive Summary
5 -6	Vision, Mission, Values, and Goals
7	Products and Services
8	Market
9	Competition
10	Competitor analysis
11 - 16	Marketing Plan

Vision, Mission, Values, and Goals (1)

Vision

What is my vision for this company? Where do we want to get to, how will we measure it and when will we get there?

Mission

The declaration of the general objectives and principles of operation

- *Who we are*
- *What we do*
- *Who our clients are*
- *What makes us different*

Values

*What are the key values that shape the way the company does business?
What will we do or not do in order to fulfil the mission?*

Vision, Mission, Values, and Goals (2)

Business Goals

What does the business need to achieve and by when?

Product and/or Service

Product and/or Service

What product/service will this company be selling

- *What does it do (functionality)?*
- *What does it do for the customer (ie why will they buy it – beware: this is not necessarily the same thing as it's functionality!)?*
- *How is it better than other similar products?*
- *Are there any other offerings that are integral to the product (eg service contracts, consumables, ongoing relationship drivers etc)?*
- *Other products that are complimentary or substitutes?*
- *Pricing of the product*

Market

Market for the product

- *Description of the market in order to define it (building on the definition of the product from previous section):*
 - *Geographic area*
 - *General types of customer and numbers of them (individuals, businesses etc)*
 - *Size of the market (numbers of units sold/number of transactions, value of units/transactions sold)*
 - *Historic growth rates*
 - *Projected growth rates*
 - *Number of competitors in the market*
 - *Concentration of competitors (ie how much of the market is accounted for by the top 3, top 5, and top 10).*
 - *Current trends in the market, why they are happening and what they mean for the future of the market*
 - *Any special regulation that is relevant to the market*
 - *Your current share of the market and hoped-for share of the market*

Competition

Competition

Who are they, how big are they, how much cash do they have, who owns them, what else do they sell, who do they sell to, how do they sell it?

Competitor name	Market share (%)	Turnover	Cash on hand	Who owns them	Products/ Services	Customers – who are they?	Sales approach

Competitor Analysis

Competitor Analysis

Building on who they are (previous section), how dangerous are they to us? Why would customers buy from us rather than them? What are our strengths and weaknesses relative to them? What do we need to do to beat them?

Competitor name	Danger rating (high, med, low)	Where are we stronger than them?	Where are we weaker than them?	Why do their customers buy from them?	What do we need to do to beat them?

Marketing plan (1): Marketing Goals

Marketing Goals

This section sets the high-level scene for your marketing activity.

- *What is it that your business needs your marketing activity to deliver?*
- *What are the main business issues that marketing should address (these should relate to your business goals)?*

Marketing plan (2): Target Markets

Target Markets

Who will be buying the product/service? What defines and categorises them? Things to think about might include: age, wealth, location, the specific issues that they face that your product solves, other interests or activities they might perform, other products/services they might buy.

Question to think about: 'if I had to describe my customers to someone from another planet who knew nothing about humans, what would I tell them to look for so that they could find more customers for me?'

There is almost certainly more than one target market – ie many segments...

Marketing Plan (3): Branding and Positioning

Brand/Position

Concept statement...

- **Customer Belief:** A statement(s) that expresses the target customer's needs: "You get me"
- **Statement of Benefit:** A promise which answers the question: "What's in it for me?"
- **Reasons to Believe:** Supporting key information: "Why should I believe you?"

Elevator statement for the product:

For [target customer] who has [customer need], [product name] is a [market category] that [one key benefit]. Unlike [competition], the product [unique differentiator].

Brand personality

The character of the brand -what does it represent?

Image

- Logos
- Colour scheme
- Font

Marketing Plan (4): Routes to market and objectives

Routes to target market

How will you reach each of your intended target markets? (eg face-to-face sales force? Inbound phone? Outbound phone? Own website? Other market place website? Etc)

– see sales plan later on for more detailed planning on this but the overview should be clear by this point.

Marketing Objectives

What does your marketing need to deliver?

- Leads – numbers per period of time*
- Suspects – numbers per period of time*
- Prospects – numbers per period of time*
- Clients – numbers per period of time*
- Cost per client*

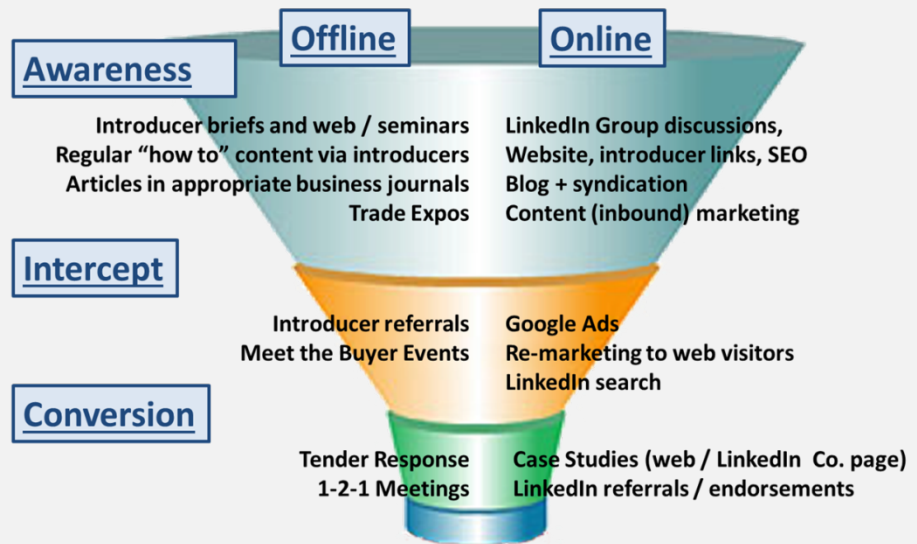
Marketing Plan (5): Marketing activity

Marketing Activity

Potential activities

- Indirect – customer satisfaction surveys
- Direct – calls, letters, brochures, emails
- Advertising – print media, directories
- Event marketing – trade shows seminars, demonstrations
- Digital/online

Example:



Marketing Plan (6): Marketing activity plan

Marketing Activity

Start Date – end date	Activity	Activity type	Who is responsible	Budget	Targets/KPIs