



# MARKETING PLAN TEMPLATE

## Introduction

**The structure of this document is a guide only** – you may wish to delete (or add) sections depending on your business type or the intended audience of your marketing plan. If you need more space, just keep typing. Delete any explanatory text and instructions as you go, which have [ and ] surrounding the text, such as this heading and paragraph.

At times you may find some common elements coming through, such as your competitive advantage may be the same as the main reason you'll beat the competition. That's ok.]

# Marketing plan

**CREATED FOR:**

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[Enter your business name here]

**DATE:**

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[Enter the date here]

**LOCATION:**

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[Enter text – provide your business address and contact details.]

**ONLINE PRESENCE**

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[Enter text –website address, email.]

**PRODUCTS AND SERVICES**

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[Outline what you're selling]

# Lean Marketing Summary

[Before you commence a full marketing plan, sketch out your overall campaign in the next two pages. It will give you and any reader an immediate understanding for what your business does, and why it will succeed.]

## **WHO WE ARE TARGETING**

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[Enter text – outline in as much detail as you can your main targets (description, location, profile, demographic).]

## **THE BENEFIT OF WHAT WE'RE SELLING THEM**

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[Enter text – the problem you solve. Rather than think in terms of what you do, try and explain why people really buy from you.]

## **OUR UNIQUE COMPETITIVE ADVANTAGE**

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[Enter text – the reason why customers choose your business over a competitor.]

## **HOW WE GENETRATE LEADS LEAD**

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[Enter text – the main ways that you get queries and new customers into your business.]

## **HOW WE RETAIN CUSTOMERS**

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[Enter text – how you encourage customers to return again and again.]

## **OUR BUSINESS CHANNEL**

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[Enter text – Outline how you intend to distribute or get your business out into the market. For example: sell direct, wholesale, use a sales agent or distributor, exhibit, online, sell subscriptions, freemium model, joint venture or an alliance, franchise etc]

## **HOW WE KNOW THE PLAN IS WORKING**

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[Enter text – outline how you intend to track your marketing is successful, the budget you've allocated and the return you expect.]

## **PLUS**

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[Enter text – add anything else that's critical to your successful marketing campaign.]

# Marketing Strategy

## **OUR OVERALL MARKETING PLAN GOAL IS TO:**

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[Enter text – describe what you hope to achieve with your marketing plan. Try to be specific such as 'enter a new market, increase sales by 50% over 3 years, launch a new product into the market'.]

### **Marketing goal 1**

[Enter text – to reach your main goal, break down how you intend to do this into 3 or more steps. If you need more steps, add more.]

### **Marketing goal 2**

[Enter text]

### **Marketing goal 3**

[Enter text]

### **Marketing goal 4**

[Enter text]

## Resources we will need

[Enter text – outline what resource you'll need to achieve your marketing goals; it could be people, funding, new products, reliance on partners etc.]

### **TARGETS AND PAIN-POINTS WE'RE SOLVING**

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**[Describe each of your targets and then outline the customer pain-point you are solving with what product or service.]**

[Outline exactly who you are targeting in as much detail as you can. Not 'people that go to restaurants' but outline the most likely people to be your customers, which could be 'couples, aged 25-30, professional jobs, no dependents, live within a 20-minute drive'. Then describe the actual pain you're solving. It's not as easy as it sounds. Restaurants are probably not selling food as the pain point. Customers are not so much hungry as they are at the restaurant celebrating an event or meeting with friends. What's the real pain you're solving? It makes it easier to market and communicate to your customers.]

#### **Target, pain point and product/service that solves this 1**

[Enter text]

#### **Target, pain point and product/service that solves this 2**

[Enter text]

#### **Target, pain point and product/service that solves this 3**

[Enter text]

#### **Target, pain point and product/service that solves this 4**

[Enter text]

# Our competition

## **WHO OUR COMPETITION IS, WHAT THEY ARE GOOD AT, AND WHY WE WILL BEAT THEM.**

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[List each of your main competitors, and then outline what they are good at. There will be something that they're doing that keeps them in business. Then for each competitor, outline how you will be able to reduce the impact of what they are good at, and how you will beat them.]

### **Competitor, what they are good at, how we will beat them 1**

[Enter text]

### **Competitor, what they are good at, how we will beat them 2**

[Enter text]

### **Competitor, what they are good at, how we will beat them 3**

[Enter text]

### **Competitor, what they are good at, how we will beat them 4**

[Enter text]

# Competitive advantage

## **OUR COMPETITIVE ADVANTAGE**

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[Explain what makes your business different. What are your key points of difference? Do you have a clear understanding of why customers will buy from you? Are you faster, cheaper, more experienced, better qualified, offer more choices, etc. What is your 'unfair advantage' that you have over your competition?]

### **Competitive advantage 1**

[Enter text]

### **Competitive advantage 2**

[Enter text]

### **Competitive advantage 3**

[Enter text]

### **Competitive advantage 4**

[Enter text]

## Other marketing factors

### **OUR BUSINESS BRAND NAME REPRESENTS**

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[Enter text – discuss the brand name of your business. Is there a story behind it? Does it represent your business in a certain way? Outline how it ties in with your products and services.]

### **OUR UNIQUE INTELLECTUAL PROPERTY**

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[Enter text – you may have protected your intellectual property such as a patent, trademark or other form of legal protection. Possibly you have copyright over something, or a registered company or domain name that no one else can copy.]

### **OUR UNIQUE INTELLECTUAL ASSETS**

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[Enter text – an intellectual ‘asset’ is something that is valuable to you but can’t be protected. For example, your database of customers and their when they buy, how ‘business is conducted’ in your industry, the referrals you get and the goodwill you’ve built, a recipe you want to keep secret, or the way a business is run. Anything that you wouldn’t want a competitor to find out.]

### **OUR CONTRACTS OR AGREEMENTS**

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[Enter text – any exclusive contracts for supply or with customers. Any agreements that guarantee you’ll either get business or the materials you need.]

### **OUR NETWORKS AND PARTNERS**

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[Enter text – outline your business networks and partners, and any strategic alliances that help you stay in business.]



# How we intend to generate leads

## **HOW WE APPROACH OUR TARGET CUSTOMERS**

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[Enter text – note each method you intend to use to market your business to target customers. List each target and then describe exactly how you intend to generate leads.]

## **HOW WE WILL USE ONLINE MARKETING TO INCREASE SALES AND BRAND AWARENESS**

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[Enter text – discuss any plans you have to address search engine optimization (SEO) and search engine marketing (SEM) to gain more customers. Also, any blogging, content marketing etc.]

## **PROMOTIONAL EVENTS WE HAVE PLANNED**

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[Enter text – write down any upcoming events, activities, sponsorships, or contests you're planning to create to increase awareness of your business.]

## **OUR ADVERTISING MESSAGE**

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[Enter text – how will you show the benefits of your products or services while suggesting a 'need' or a 'problem' that your offerings can solve for consumers in your advertising. Do you have a tagline or slogan?]

## **WHAT PUBLIC RELATIONS ACTIVITIES DO YOU HAVE ON THE HORIZON?**

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[Enter text – getting the media involved in your business can be a masterstroke. Make a note of any opportunities you can see coming up where the media might be interested in a story about your business.]

## How we intend to keep our customers

### **CUSTOMER RETENTION STRATEGY**

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[Enter text – list the same key targets that you had when generating leads. Now next to each, outline how you intend to keep them as customers. Any incentives, loyalty programs, ways of rewarding business, building relationships, finding what your customers value as part of the relationship etc.]

## How we know the plan is working

### **OUR MARKET RESEARCH**

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[Enter text – Spend as much time as you can, outlining any research you’ve completed with customers, suppliers and any industry research that reassures you the business is sustainable. Include any external research or statistics, traffic flows, or trends. Anything that makes it more likely you’re responding to a need.]

### **CUSTOMERS INSIGHTS**

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[Enter text – detail the key findings you’ve discovered about your customers in your target market. Outline what they’ve said about your business]

### **OUR MARKETING BUDGET**

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[Enter text – outline how much money you have to spend on marketing activities as a whole and justify the spend. If you can, estimate a return on investment such as ‘we will spend X and expect to get YZ in sales.’]

# Our Marketing Strengths, Weaknesses, Opportunities and Threats

## **OUR MARKETING STRENGTHS, AND HOW WE INTEND TO DEFEND THEM.**

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[Enter text – Consider all the factors that are working well for your business. For example: do you have better products or superior service, gained loyal customers who give you repeat business, have better product or service knowledge than competitors, staff well trained or good at converting sales leads into sales, well located, an excellent website that’s bringing in useful sales leads? How do you intend to make sure these strengths are retained?]

### **Marketing strength and how we intend to retain it 1**

[Enter text]

### **Marketing strength and how we intend to retain it 2**

[Enter text]

### **Marketing strength and how we intend to retain it 3**

[Enter text]

### **Marketing strength and how we intend to retain it 4**

[Enter text]

## **OUR MARKETING WEAKNESSES, AND HOW WE INTEND TO REDUCE THEM.**

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[Most businesses have some vulnerable areas. For example do you have higher costs than competitors, lack suitably trained staff, short of funding, capacity and resources? Note your main weaknesses and how you propose to overcome or reduce them. For example, if you have higher supply costs than competitors, can you find alternative suppliers or form an alliance with similar businesses to leverage more buying power? If you lack resources or skills, can you form a joint venture or strategic alliance to overcome any gaps in your capability?]

### **Marketing weakness and how we intend to reduce it 1**

[Enter text]

### **Marketing weakness and how we intend to reduce it 2**

[Enter text]

### **Marketing weakness and how we intend to reduce it 3**

[Enter text]

### **Marketing weakness and how we intend to reduce it 4**

[Enter text]

## **OUR MARKETING OPPORTUNITIES, AND HOW WE INTEND TO IMPLEMENT THEM.**

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[What future opportunities do you have in the coming years? For example new markets for your product or service, a competitor is struggling, new legislation will open up new customers, strategic alliances with

larger companies or new technology will open up new revenue streams. Outline what they are and the practical steps you're taking to put them into action.]

**Marketing opportunities and how we intend to implement 1**

[Enter text]

**Marketing opportunities and how we intend to implement 2**

[Enter text]

**Marketing opportunities and how we intend to implement 3**

[Enter text]

**Marketing opportunities and how we intend to implement 4**

[Enter text]

**OUR MARKETING THREATS, AND HOW WE INTEND TO AVOID THEM.**

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[Most businesses have external threats that are no fault of their own and face competition from bigger or better-known businesses. Outline the marketing threats and how you intend to address them.]

**Marketing threats and how we intend to avoid them 1**

[Enter text]

**Marketing threats and how we intend to avoid them 2**

[Enter text]

**Marketing threats and how we intend to avoid them 3**

[Enter text]

**Marketing threats and how we intend to avoid them 4**

[Enter text]

## Additional headings

[Use this template to add any other topics that you feel are important to your marketing plan. Simply copy and paste, then edit the headings]

[Enter text]

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