

Basic Marketing Plan Template

1.0 Marketing Vision – Introduction

2.0 Goals and Objectives

3.0 Market Description (Product/Service Specific if different)

3.1 Ideal Customer (Product/Service Specific if different)

3.2 SWOT Analysis (Product/Service Specific if different)

Strengths

Weaknesses

Opportunities – Typically external

Threats – Typically external

3.3 Competition (Top 3) (Product/Service Specific if different)

Strengths and weaknesses (Of each competitor)

4.0 Differentiators (What makes you different) (Product/Service Specific if different)

5.0 Market Position (i.e. Low price/Low value, High price/High value, commodity, etc.)

6.0 Core Strategy (“High Level” statement/strategy of how you will accomplish objectives; may be multiple strategies)

6.1 Core Branding Elements (logo, colors, fonts, tag lines, etc.)

7.0 Price Rationale (How do you arrive at your end-user price)

8.0 Marketing Materials

8.1 Collateral (Brochures, sell sheets, videos, etc.)

8.2 Presentations (Group, individual, pitch deck, etc.)

8.3 Testimonials (Previous or current users)

8.4 White Papers (Published technical writings about your product or service)

9.0 Web Plan

Tactics (Who, what, when, where, how?)

10.0 Social Media Plan

Tactics (Who, what, when, where, how?)

11.0 Advertising

Tactics (Who, what, when, where, how?)

12.0 Referrals

Tactics (Who, what, when, where, how?)

13.0 Lead Generation Plan

Tactics (Who, what, when, where, how?)

14.0 Lead Conversion Plan

Tactics (Who, what, when, where, how?)

15.0 Service Experience

Tactics (Who, what, when, where, how?)

16.0 Loyalty Product/Service Offerings

17.0 Marketing Expense Budget (Cost to implement Tactics)

18.0 Marketing Calendar

19.0 Key Marketing Metrics

20.0 Sales Distribution Plan (i.e. Channel selection; direct, distributor, online, mix, etc.)

Sales Forecast (First 3 years, monthly)

Sales Compensation Program (How will the channel(s) be compensated)

