

Marketing Plan Guide: Research, Planning, Execution, Reflection

[Company Logo]

[Company Name]

Date:

Version:

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Key: Four Phases

Research

Planning

Execution

Evaluate

Research

Why should your business exist and succeed? What is your mission statement and company history that identify and explain your syntax of values and value-adds.

Mission Statement

[Enter your company's mission statement]

Company History/Story

[Enter your company's story and/or abridged history]

Positioning

Think about your place in your industry. Anyone reading this part of the plan should know what your strengths, weaknesses, and comparisons to competing companies are.

Market Condition

[Speak to the market conditions in the industry. How is your industry performing in general? Tools: 5C's, Porter's Five Forces]]

Value Prop

[In general, what benefit does your business, product, or service offer that would make someone want to become a customer? Identify the problem to which you are the solution.]

Competitive Advantages

[What makes your business unique and comparatively stronger than competitors? What do you offer that no other company, product, or service does, or does as well?]

Pricing Strategy

[What is your pricing strategy and how was it developed? Here is a good time to talk about best practices around discounting.]

Competitor Analysis

[List your top competitors as well as the following information for each competitor:]

- **Comparative Strength** – *What are your company's assets that this competitor does not have?*
- **Comparative Weakness** – *In what areas or attributes do your competitors outperform you?*
- **Counterpoints** – *If a comparative weakness is mentioned in sales negotiations, which counterpoints can be used to address those weaknesses?*

| Competitor Name | Comparative Strength(s) | Comparative Weakness(es) | Counterpoint(s) |
|---|--------------------------------|---------------------------------|------------------------|
| Competitor A <i>Ex. Nurse Practitioner Business Owner</i> | | | |
| Competitor B | | | |
| Competitor C | | | |

SWOT Analysis

| Strengths | Weaknesses | Opportunities | Threats |
|---|---|--|---|
| What we're good at. What's working. What our customers like about us. | What we want to fix. What we want to strengthen. What we want to become more efficient at. | What we think we can do to meet the current/future needs of people/industry. What we think we'll be good at. What will be our difference-maker (value add). | What we think could hinder our growth. What/who we think could take our customers. |
| | | | |

Business Initiatives

[Company name] has the ambitious goal of [overarching company goal]. To help the business do that, our marketing team will pursue the following initiatives in [current year]:

Ex. Question: Who oversees what actions/priorities?

Who are the leaders of your initiatives (ex. sales, operations, education, consulting, membership), and how is the rest of the department structured?

Initiative 1

Description: [Example: Over the next 12 months, we'll work on building a website property that becomes a go-to resource for our customers' burning questions -- and our number-one source of leads month over month.]

Goal of initiative: [Example: To increase our website's rank on Google and create critical top-of-the-funnel marketing content that helps our current and future customers and keeps us in their decision-making process.]

Metrics to measure success: [Example: 1000 organic page views per month / 10 content downloads per month]

Initiative 2

Description:

Goal of initiative:

Metrics to measure success:

Initiative 3

Description:

Goal of initiative:

Metrics to measure success:

Target Market

Describe SOM. Identify their key prospect attributes, why they were chosen, who should be left out at this time from direct marketing?

Buyer Personas

Based upon Proto Persona worksheet.

Within the target market(s), we've identified the following buyer personas to represent our ideal customers:

[Buyer Persona 1]

[Buyer Persona 1] is [age range] years old. S/he works in [job title or industry name] for a living and spends his/her free time [describe lifestyle, family size, etc.]. Ultimately, [Buyer Persona 1] wants [personal or professional challenge(s) that your business will try to solve].

[Buyer Persona 2]

[Buyer Persona 1] is [age range] years old. S/he works in [job title or industry name] for a living and spends his/her free time [describe lifestyle, family size, etc.]. Ultimately, [Buyer Persona 1] wants [personal or professional challenge(s) that your business will try to solve].

Tools, Software, and Resources

Explain what resources the sales team uses to accomplish its goals. This include online tools, documentation, customer references, and any other tools used in selling.

Programs/Applications

[Identify the any programs used and how they are being used to affect customers at every point in the purchase decision process. If there are any other applications being used, such as campaign tracking platforms, identify them and their purpose.]

Tools/Resources

[Identify any outside organizations or partners that may be involved at any point in the campaign. Be specific as to why they are being included and how they will affect the customer purchase decision process.]

What Do We Need?

[Identify any tools, resources, or knowledge you need in order to move forward effectively and efficiently.]

Marketing Strategy

Provide an overview of your marketing strategy. This should not be a copy and paste of your entire marketing plan, but rather a rundown of what sales should know about brand awareness and lead generation.

Included below are some of the most popular forms of marketing today. If your company does not use some of these, or if you use others not included here, feel free to delete and add sections respectively.

Email Marketing

[Briefly explain your email marketing strategy.]

Blogging and Social Media Content Marketing

[Briefly explain your blogging and social media content marketing strategy.]

Web Marketing

[Briefly explain your web marketing strategy, including webpage.]

Networking (Event/Webinars/Conference Marketing)

[Briefly explain your event marketing.]

Membership Engagement and Marketing

[Briefly explain your network(ing) utilization strategy.]

Community Marketing

[Briefly explain your physical outreach to SOM strategy.]

Prospecting Strategy

What steps should you/team take to qualify leads and reach out to them?

Criteria for Outreach

[Establish must-have attributes of channel to qualify for utilization; how many in SOM should be accessed?]

Inbound Marketing Strategies

[Talk about your company's tactics for connecting with contacts on an inbound level.]

Outbound Marketing Strategies

[Talk about your company's tactics for connecting with potential contacts on an outbound level.]

Execution Plan

Outline the concrete actions that will be taken as part of the marketing campaign. Include budgetary limits, timeline for implementation/ sales team will take in order to achieve the company's goals. How many calls should be made, how many locations will be dropped in on, how many high-profile clients will be worked, etc.

Tactic #1

[Explain the first and copy/paste this section as needed for more tactics in your action plan.]

Evaluate

What are your goals? These goals need to be evaluated throughout the campaign because marketing is a never-ending business necessity.

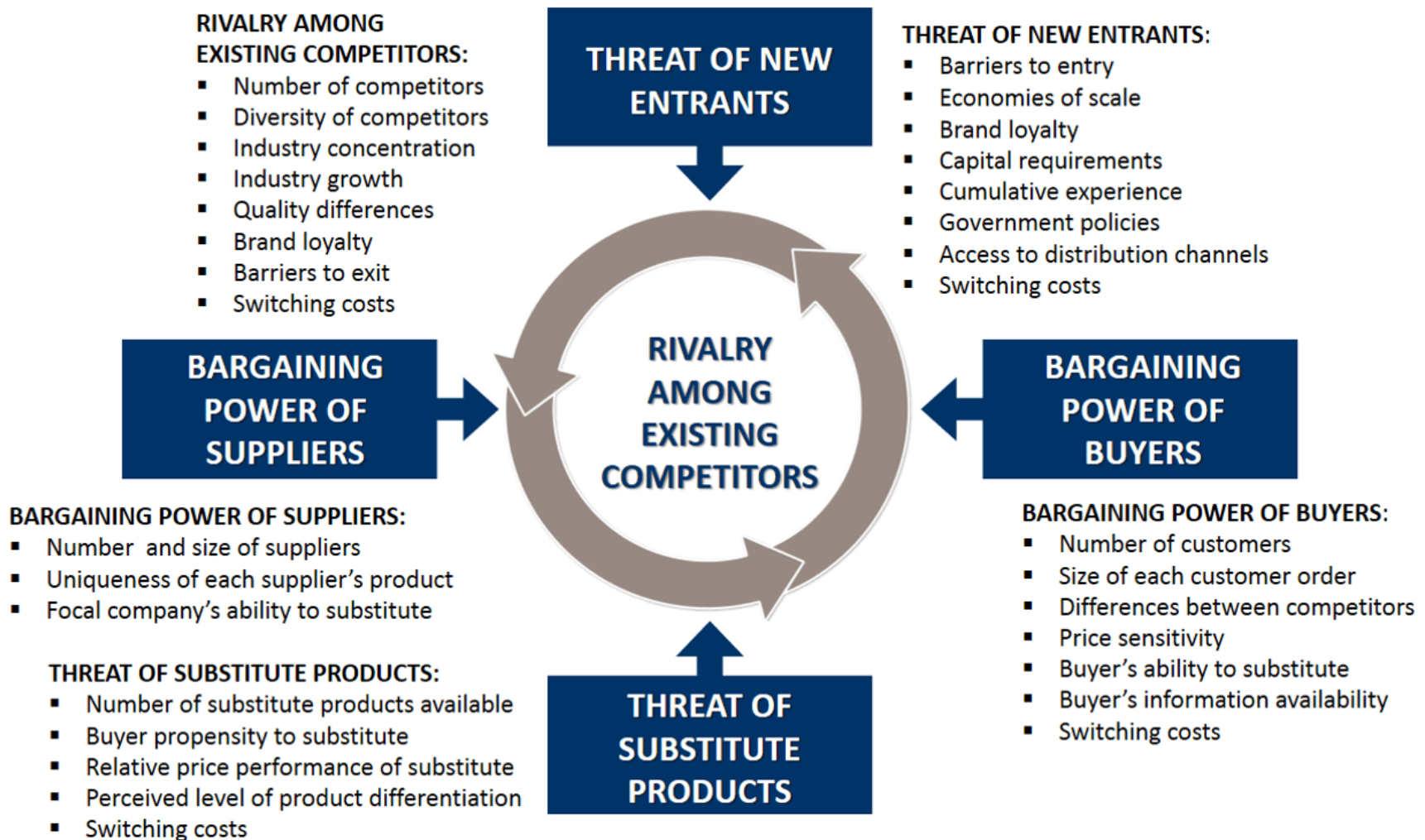
Revenue Targets

[What is your targeted revenue – booked and live – for the end of the period?]

ROI of Marketing Target

Other Key Metric(s)

Porter's Five Forces



[Five-Forces-Model-Porter.png \(1361x765\) \(wp.com\)](#)