

HOW TO USE  
 MARKETING PLAN BUILDER

Step 1 – Gain a sound working knowledge of the contents of *MARKETING PLAN BUILDER* eBook or paperback.

The book guides you through the essential components of a marketing plan and explains elementary marketing principles and practices. It includes tips and suggestions to help you develop a plan that matches the specific needs of your business. A series of completed template examples culminate in a consolidated sample marketing plan.

Because no two businesses are the same the book includes reference keys at each section of the plan (see example below) to indicate the suitability of each step for your business depending on whether you market **products** or **services** from **business to consumer** (B2C) or **business to business** (B2B).

The reference keys also indicate the applicability of each step according to your plan level preferences from ‘Basic’ through to “Intermediate’ and ‘Advanced’.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

*Reference key example:*

**Step 2– Build your plan step-by-step with the Microsoft ® Word ™ ‘fill-in-the-blanks’ templates provided in this document (downloaded from www.marketingplanbuilder.com)**

It is recommended that you copy and paste the individual templates selected for your plan into a clean Microsoft Word document with a separate page for each template. (This will avoid any Microsoft Word version compatibility issues.)\*

When you have completed the selected templates, with any relevant commentary you may wish to add, complete the formatting to your personal preferences.

It is suggested that you develop your plan in manageable ‘bite sized chunks’. Fill-in the templates to the ‘basic’ stage initially, then go on to the ‘intermediate’ or ‘advanced’ stages as your knowledge of the planning process grows and as your understanding of the market in which you are competing increases.

Try to get into the habit of allocating an hour a day to develop the plan. You will be rewarded with the realization of how much your understanding of the market and your business grow as you progress through the planning process.

On completion you will be ready to start implementing the plan that will produce a vastly improved outcome.

Successful and profitable marketing!

\*To copy and paste a template (or table):  
1. In print/layout view rest the pointer on the table until the table move handle appears  
2. Click the table ‘move handle’ to select the table  
3. Click ‘Copy’ (Control +C) for PC or (Command +C) for Mac.  
4. Place the insertion point in the new document where you want to paste the table  
5. Click ‘Paste (Control +V) for PC or (Command +V) for Macs.

## Cover Sheet

(Name of company)

## Marketing Plan for

## (Insert brand name and product)

(Insert Logo)

For the period

(Insert timeline)

Prepared by: (Name and position)

(Insert date)

EXECUTIVE SUMMARY

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

The executive summary provides an overview of the thrust and direction of the plan. While it appears at the beginning of the plan it can only be completed when the remainder of the plan is in place. Come back to this step when the rest of the plan is finished and when you are satisfied that the plan is cohesive and consistent.

|  |  |
| --- | --- |
| Executive summary | |
| When and why the business was established. |  |
| Geographical markets it was set up to cover. |  |
| A description of the products (or services) we offer |  |
| Trade customers profile |  |
| End user customers profile |  |
| A summary of our progress in the market to date |  |
| The dynamics that have arisen that need to be addressed |  |
| The main factors that will lead to forecast sales and profits |  |
| The impact the plan will have on revenue and profit. |  |

Part 1

Market & Sales Review

PART 1: SALES & MARKET REVIEW

# **Sales Analysis**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This step reviews the turnover and the gross and net profit (if available) of your individual products or services over the last two or three years. If gross and/or net profit figures are not available at the product or service level, turnover data alone will shed some light as to ‘where the business is at’. As we are examining sales history in this analysis, naturally this section applies to established business only as distinct from ‘start-up’ enterprises. (Add or delete rows as required)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Company Sales Analysis by Product or Service | | | | | | | | | |
|  | Turnover  $000s | | | Gross Profit or Loss  $000s | | | Net Profit or loss  $000s | | |
| Product or Service | 3 years ago | 2 years ago | Last year | 3 years ago | 2 years ago | Last year | 3 years ago | 2 years ago | Last year |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| KEY POINTS: | | | | | | | | | |

This optional step gives you the opportunity to classify your products into one of four classifications and to draw some further conclusions about future prospects and options. Place your products or services in one of the four grids of the matrix according to the preceding three year sales analysis. (Insert text boxes as appropriate).

|  |
| --- |
| **Product or service classifications** |

Boston Consulting Group Matrix[[1]](#footnote-1)

Relative Market Share

High

Low

Market growth rate

High

Low

****





****

Dogs make a negative contribution to profit and should be deleted from the product range unless they fill some strong strategic purpose such as keeping you involved with customers who would otherwise not deal with you.

Rising Stars

### 

### Question Marks

### Dogs

Cash cows are low maintenance established products that should be ‘milked’ to provide cash flow and profit for investment in other areas such as new product development

Stars are products that are rapidly gathering sales and profit momentum. Bright future - but require high investment.

Question marks have the potential to become stars, cows or dogs and must be analyzed carefully in order to determine whether they are worth the investment required to grow market share.

# 1.2 Products or Services Review

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This step is an aid to crystallizing your products’ ‘reason for being’ It reviews the status of the products or services you market now. It states their benefits, how they compare with competitors, their current or potential profit contribution rating and their product or service classification. (Add or delete rows as required).

(Add or delete rows as necessary)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Existing products or services review | | | | |
| Product or Service | Benefits | Comparison with competitors | Profit contributor  Rating  (1 – 10) | Product or service classification  (Refer BCG matrix) |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Key Points: | | | | |

# 1.3 Market Segment & Opportunity Rating

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate✓ | | Advanced ✓ | |

# All markets can be divided into smaller groups or “market segments”.

# If you do this with the market in which you are competing it will help you to develop your plans and to competitively position your products or services.

Market segmentation is a method of organizing and categorizing those people or organizations that you think will buy your products. You are breaking the market down into smaller and smaller units to make your planning simpler and more effective. (Add or delete rows as required).

# 1.3 Market Segmentation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Market segmentation and opportunity rating | | | | |
| Existing & Potential market segments | Rate the extent to which the segment is already being serviced by competitors  Scale 1 -10 | Rate your current or potential ability to service this segment  Scale 1-10 | Estimated growth rate  Scale 1-10 | Rate your level of priority  Scale 1-10 |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Conclusion: | | | | |

1.4.1 Product (or Service) Segmentation by Size and Trend

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

All markets can be further broken down into product segments. A product segment is a sub-sector of a larger product category. In order to sharpen your focus you should have at least a broad understanding of what the main product sectors are in the overall market in which you are competing. You can break product segments down further by estimating segment sizes, vales, share of market and whether the segment is growing or has reached maturity or is in decline. (Add or delete template rows as required).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Product segmentation by size and trend | | | | |
| Product segment | Product segment volume\*  (In tonnes, litres, units or other recognized industry measure) | Product segment value\*  $s | Estimated product share of market by value %\* | Life cycle stage  Growth, maturity or decline |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
| Total market |  |  |  |  |
| Key Points: | | | | |

\*NOTE: In the case of small or micro businesses there is no point in estimating the market volume and value of product segments as the national share the business is competing for is not meaningful. It would be helpful however to estimate a break up the market by product segment and to have an understanding of which segments are growing and which are declining.

1.4.2 Product Segmentation by Channels of Distribution.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

You can refine the market breakdown by product segment further by drilling down to the main channels of distribution with an estimate of importance (by volume or value) for each product segment in the sector. Rough estimates are better than nothing as you can update them as your knowledge of the market becomes clearer. (Add or delete rows as required).

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Product segments by channels of distribution | | | | | | | |
| Market segment: | Channels of distribution % | | | | | | |
| Product segment | Channel 1  e.g. Direct from factory | Channel 2  e.g. Retailers category 1 | | Channel 4  e.g. Retailers category 2 | Channel 5  e.g. Retailers category 3 | Channel 6  Wholesalers | Channel 7  e-Commerce |
|  |  |  | |  |  |  |  |
|  |  |  | |  |  |  |  |
|  |  |  | |  |  |  |  |
|  |  |  | |  |  |  |  |
|  |  |  | |  |  |  |  |
|  |  | |  |  |  |  |  |
| Key Points: | | | | | | | |

# 1.5 Competitor analysis

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

This step identifies your three or four closest competitors and compares them with your business in a set of different criteria. Competitor analysis gives you a focus to learn from your competitors by identifying improvement opportunities to implement in your business. (Add or delete rows or columns as required).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Competitor analysis | | | | | |
| Criteria | Our company | Competitor 1  Name: | Competitor 2  Name: | Competitor 3  Name: | Competitor 4  Name: |
| Estimated market share |  |  |  |  |  |
| Estimated annual sales |  |  |  |  |  |
| Reputation in market |  |  |  |  |  |
| Price |  |  |  |  |  |
| Product quality |  |  |  |  |  |
| Product range |  |  |  |  |  |
| Service |  |  |  |  |  |
| Location |  |  |  |  |  |
| Distribution |  |  |  |  |  |
| Advertising |  |  |  |  |  |
| Innovation |  |  |  |  |  |
| Current market segment focus |  |  |  |  |  |

1.6 Marketing Research

1.6. Marketing Research

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

After you have gathered all of the market data at your disposal from existing sources (market research), you may need to validate your theories, impressions and conclusions. This calls for marketing research that involves the collection of data that is not readily available and is specially commissioned (and paid for) by you to fill gaps in your knowledge base.

|  |  |
| --- | --- |
| Product concept marketing research checklist | |
| Product concept |  |
| Market segment |  |
| Research objective |  |
| What we need to know | |
| Existing behavior |  |
| Satisfaction with existing products |  |
| Product needs |  |
| Where do they purchase? |  |
| How frequently do they purchase? |  |
| What would influence brand or products switching? |  |
| How much are they prepared to pay? |  |

PART 2: SITUATION ANALYSIS

2.1 SWOT Analysis

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

**SWOT analysis**

OPPORTUNITIES (external)

THREATS (external)

BUSINESS IMPLICATIONS

SUSTAINABLE COMPETITIVE ADVANTAGES

STRENGTHS (internal)

KEY LEVERAGE POINTS

WEAKNESSES (internal)

This is an analysis of your internal strengths and weaknesses and the external opportunities and threats and how they impact on each other. Think through this analysis carefully as it can provide a solid basis for the strategies you develop later in the plan.

OUR SINGLE MOST SUSTAINABLE COMPETITIVE ADVANTAGE

2.2 Mission Statement

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

A mission statement says what your company “stands for” and gives you a vision to work towards. It does not limit your scope but makes day to day strategic decisions easier to make within a specific context. A mission statement says what your company represents in the marketplace and the broader community without being overly patronizing.

|  |  |
| --- | --- |
| Mission statement components | |
| Business we are in |  |
| The products we produce |  |
| The customers we serve |  |
| The area we serve |  |
| The benefits to customers |  |
| The benefits to the community |  |
| The benefits to our employees |  |
| The benefits to us |  |

(Name of Company)

OUR MISSION STATEMENT

Our corporate mission is to:

2.3. Target Markets (Consumer)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

If your products or services are aimed at individual consumers (B2C), be as specific as you can about defining your consumer (or end user) target market/s by geographic profile, demographics, psychographics, and behavioral characteristics. You cannot know too much about your customers and prospects

|  |  |
| --- | --- |
| Consumer target market characteristics | |
| Product or service: | Target market: |
| Geographics | |
| Location |  |
| Area size |  |
| Population |  |
| Population density |  |
| Climate zone |  |
| Demographics | |
| Age range |  |
| Gender split |  |
| Income group |  |
| Family composition |  |
| Household type & size |  |
| Occupation |  |
| Education |  |
| Psychographics | |
| Personality type |  |
| Behaviour characteristics |  |
| Life style |  |
| Rate of use |  |
| Repetition of need |  |
| Benefits sought |  |
| Loyalty characteristics |  |
| Behavioural | |
| Needs to be fulfilled |  |
| Knowledge level |  |
| Information sources |  |
| Attitudes |  |
| Use or response to a product |  |

2.3. Target Markets (Consumer)

2.3 Target Markets (Business)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

If your products or services are aimed at business customers (B2B) do your best to define them by type, industry, business size, financial strengths, number of employees, location, employment type, turnover and any special requirements.

|  |  |
| --- | --- |
| Business target market characteristics | |
| Target market: | |
| Business Type | Business target market characteristics |
| Business type (manufacturer, retail, wholesale, professional, service, etc.) |  |
| Industry |  |
| Size of business |  |
| Financial strength |  |
| Number of employees |  |
| Location |  |
| Employment type |  |
| Turnover range |  |
| Special requirements |  |

2.4 Keys to Success

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

|  |  |
| --- | --- |
| Keys to success | |
| Product: | |
| Keys to success | Comments |
| Meaningful competitive edge |  |
| Ability to charge a competitive price |  |
| An effective promotional program |  |
| Saturation distribution |  |
| Retail trade support |  |
| Interactive e-commerce web site |  |
| Outstanding customer service |  |
| Other: (Specify) |  |

# This section consists of a summary of the components of the plan that you believe are essential for the plan to succeed. If they are not in place the fulfillment of the plan will be placed at risk.

Keys to success vary from one product and product category to another. Examples include but are by no means limited to a competitive edge, an ability to charge a premium price, an effective promotional program, saturation product distribution, retail trade support, an effective e-commerce web site and outstanding customer service.

2.5 Critical Issues

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

These are the assumptions you make in the plan which will cause the plan to fall short of the set objectives if they do or do not take place. Examples include economy growth rate, adequate finance, retention of key employees, market growth, absence of new competitors, effective channel partners, a flexible supply and no drastic changes to raw material prices and supply. (Add or delete rows as required).

|  |  |
| --- | --- |
| Critical issues | |
| Product or service: | |
| Critical Issues | Comments |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

PART 3: MARKETING & SALES OBJECTIVES

###### 3.1 Marketing Objectives

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Think carefully about what you want to achieve in the market overall. Do you want to?

1. Expand penetration of existing markets with existing products. (Market penetration).
2. Expand into new markets with existing products. (Market development).
3. Develop new products for existing markets. (Product development).
4. Develop new products for new markets. (Diversification).

If you have several marketing objectives, sort them into primary and secondary objectives. (Add or delete rows as necessary).

|  |  |  |
| --- | --- | --- |
| Marketing objectives | | |
| Product: | | |
| Market segment: | | |
| Marketing Objective | Time frame | How measured |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### 3.2 Sales Objectives

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This is a summary of your products or services by individual product or product group, showing sales objectives for the current year followed by the objectives for the first year of the plan along with forecasts for years 2 and 3 showing sales by value and sales by volume.

The schedule is based on the conclusions you have drawn and the strategies you intend to follow. It indicates where you will be directing your efforts in terms of investment and development.

The sales objectives should also be consistent with the set marketing objectives such as market shares based on market size estimates. (Add or delete rows as required).

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Sales objectives – existing & new products | | | | | | | | |
| Product or product group: | | | | | | | | |
|  | Current year | | Year of plan | | Year 2 forecast | | Year 3 forecast | |
| Existing products | # of units | $000’s | # of units | $000’s | # of units | $000’s | # of units | $000’s |
| 1. |  |  |  |  |  |  |  |  |
| 2. |  |  |  |  |  |  |  |  |
| 3. |  |  |  |  |  |  |  |  |
| 4. |  |  |  |  |  |  |  |  |
| Total existing products |  |  |  |  |  |  |  |  |
| New Products |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Total (all products) |  |  |  |  |  |  |  |  |

PART 4: MARKETING STRATEGIES

PRODUCT

#### 4.1.1 Product (or service) development

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced✓ | |

New products are the lifeblood of any business. This is a summary of your product development plans. It should encapsulate all the information you have gathered in the product development process.

|  |  |
| --- | --- |
| ProductDevelopment Checklist | |
| Criteria checklist | Response |
| What is the product concept? |  |
| What are its features? |  |
| What are its benefits? |  |
| What is the proposed target market |  |
| Will this product replace an existing product or create a new product segment? |  |
| Can it be produced with our existing facilities? |  |
| What pricing strategy is envisaged? |  |
| How will it be branded? |  |
| How will it be distributed? |  |
| How will it be packaged? |  |
| How will it be communicated to the target market? |  |
| Which products will it compete against? |  |
| What market research is proposed? |  |
| What is the market research budget |  |
| What is the product development budget? |  |
| What is the proposed marketing budget? |  |
| What are the perceived risks? |  |
| What is the proposed launch date? |  |

4.1.1 Product Development schedule (cont.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This next step sets out the product development schedule showing the key stages with their target completion dates and allocation of responsibility. Examples include production of prototypes, product samples, packaging designs, commencement of commercial production, trade launch dates, distribution rollout, consumer launch dates and post launch evaluation. (Add or delete rows as required).

|  |  |  |
| --- | --- | --- |
| Product Development Schedule | | |
| Product development stage | Target completion date | Responsibility |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### 4.1.2 Product Proposition

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

### This is a statement about what is unique about your product. What are its unique benefits, which the competition cannot or does not offer? The proposition should be so strong that it attracts customers to your product in preference to your competitors. Examples include functionality, product design, product quality, taste, keeping qualities, etc. (Add or delete rows as required).

|  |  |  |
| --- | --- | --- |
| Product proposition development | | |
| Product: | | |
| Product proposition options | Proposition expression | Scale of appeal  Rating 1 - 10 |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Preferred primary product proposition expression: | | |

### 4.1.3 Product Positioning

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate✓ | | Advanced ✓ | |

How will your product be positioned to create a niche in your customers’ minds? How do you want your product to be perceived? What will differentiate your product from your competitors? How will it provide your product with a frame of reference? Is it intrinsic or extrinsic? Where does your product sit in a positioning map relative to competitors?

Positioning Map for (insert name of product or service)

Variable 1 (Name) High end

Variable 2

(Name)

High end

Variable 2

(Name)

Low end

|  |  |
| --- | --- |
|  |  |
|  |  |

Variable 2 (Name) Low end

### 4.1.3 Product Positioning (cont.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced✓ | |

|  |  |  |
| --- | --- | --- |
| Product or service positioning statement development | | |
| Product or service: | | |
| Positioning options checklist | Positioning statement | Scale of uniqueness Rating 1 - 10 |
| User group |  |  |
| Product quality & functionality |  |  |
| Price & quality |  |  |
| Price & service |  |  |
| Usage occasions |  |  |
| Store environment & product range |  |  |
| Other (specify) |  |  |
| Preferred positioning statement: | | |

If you identify a unique position for your product or service try to craft a few well-chosen words in to a positioning statement and use it in your advertising, packaging, stationery, corporate brochures, web site, staff uniforms and everywhere else your product or service is promoted.

This will help to communicate your position to potential customers and to crystallize it in their minds

### 4.1.4. Branding

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This is a statement about what your branding intentions are. Are you going to use an existing or new brand name? Are you going to use the company name as the brand name? Are you prepared to invest in the development of an original and distinctive brand name that could have value in the marketplace in the long run? (Use text highlight colors for □ Yes or □ No selections).

|  |
| --- |
| Branding considerations checklist |
| **Product:** |
| Is our corporate brand name widely recognized in the market in which we compete? □ Yes □ No  If ‘yes’ would the addition of a description of the product or service category to the corporate name add to recognition and positioning? □Yes □ No  Would the introduction of an original brand name offer marketing advantages? □ Yes □ No  If ‘yes’ what are they?  What branding strategy do our main competitors use? □ Corporate □ Original  Are competitors’ branding strategies more effective than ours? □ Yes □ No  Do we have access to potential brand names that could be developed? □ Yes □ No  Are we prepared to invest resources required in the development of an original brand? Yes □ No □  Is there potential in the market for the introduction of a ‘price’ brand *in addition* to our main brand?  □ Yes □ No Comment: |
| Summary: We intend to market our product under the brand name because |

#### 4.1.5 Brand & Corporate Image

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

State where your brand or corporate image is now and where you want it to be. Use well-chosen adjectives such as *reliable, dependable, friendly, innovative, hi-tech*, etc.; to help you to define the image you wish to project. What steps will you take to build or strengthen the desired brand image?

|  |
| --- |
| Brand (or corporate) Image checklist |
| Q. What do we know about our current brand (or corporate) image among customers, prospects, suppliers and others in contact with the company?  A. |
| Q. Where do we want the brand image to be?  A. |
| Q. If our brand was a person, what images attributes would we want to convey?  A. |
| Q. How does our image compare with our nearest competitors?  A. |
| Q. How well does our current visual corporate identity contribute toward the desired brand image?  A. |
| Q. What steps can we take to strengthen the desired brand image among our customers, prospects, employees, suppliers and others?  A. |

4.1.6. Packaging

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Summarise the pros and cons of your existing or proposed packaging materials and compare them with those of your most direct competitors. Then outline what you intend to do to improve your packaging materials in functionality and graphics.

|  |  |  |
| --- | --- | --- |
| Packaging Checklist | | |
| Product: | | |
| Criteria | Functionality | Graphics |
| What are the pros and cons of our packaging materials? |  |  |
| What are the pros and cons of our main competitors packaging materials? |  |  |
| What we can do to improve our packaging’s functionality and design graphics |  |  |

PRICE

### 4.2.1. Pricing strategies

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This is a comparison of your price points with those of your nearest competitors. It provides the opportunity to identify any problems or opportunities that may exist in this important part of the marketing mix.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Competitive pricing analysis | | | | | |
| Product | List price $ | End user price  $ | Retail Mark up $ | Retail Markup % | Retail Gross Margin % |
| Our product |  |  |  |  |  |
| Competitor 1 (Name) |  |  |  |  |  |
| Competitor 2 (Name) |  |  |  |  |  |
| Competitor 3 (Name) |  |  |  |  |  |

4.2.1 Pricing strategies (cont).

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

|  |  |  |  |
| --- | --- | --- | --- |
| Pricing strategies | | | |
| The pricing strategies we intend to adopt are: | | | |
| □Cost plus | □Market skimming | □Market penetration | □Loss Leader |
| □ Premium pricing | □Parity pricing | □Commodity pricing | □Captive pricing |
| The rationale for adopting these options is: | | | |

Determine what your pricing strategies will be in the future and how they will be justified. Comment on the benefits of adopting the proposed strategies. **(**Use text highlight colors for your selections).

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

### 4.2.2. Pricing tactics

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

State what your pricing tactics will be in the future and how they will be justified. Comment on the benefits of adopting the proposed tactics. **(**Use text highlight colors for your selections).

|  |
| --- |
| Proposed Price Tactics |
| Product: |
| The pricing tactics we intend to adopt are: □ Short term discounts □ Quantity discounts □ Promotional allowances  □Special payment or credit terms □Consignment terms □Refund policy □Bundling □Other (specify  The rationale for adopting these options is**:** |

PLACE

4.3.1 Business Location Analysis

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

If business location is important to your business (as in a retail enterprise or for proximity to customers) think about its suitability based on the criteria listed in the template or if you should consider moving to a more suitable location.

|  |  |
| --- | --- |
| Business location analysis | |
| To what extent does the site affect your business |  |
| What is the rate of passing traffic? |  |
| Is the site rental high, low or average? |  |
| Is passing traffic commensurate with rent? |  |
| Is the building in keeping with your desired image? |  |
| What is the extent of direct competition? |  |
| Are there complementary businesses in your area? |  |
| Is customer parking adequate? |  |
| Is there enough space for your operations? |  |
| Are there signage opportunities to attract customers? |  |
| Is the site close to residential or commercial zones from which your customer base is drawn? |  |
| Is the location developing, reaching maturity or in decline? |  |
| Should you consider moving to a better location? |  |

### 4.3.2 Distribution

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Outline your existing channels of distribution with their level of efficiency. Then state what changes you propose to make (if any) to improve your penetration of existing products in current markets or new products in new markets. (Add or delete rows as required).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Distribution channels checklist | | | | |
| Product | Target market | Existing distribution channels | Efficiency ranking 1 to 10 | Proposed changes (if any) |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### 4.3.2 Distribution Channel Partners Maximization Checklist

4.3.3 Distribution channel partners business maximization

Summarize the strategies you envisage to encourage your distribution channel partners to maximize the revenue they return. State how you plan to service them and the steps you will take to treat them as ‘partners’. (Add or delete rows as required).

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

|  |  |  |
| --- | --- | --- |
| Distribution channel partners maximization checklist | | |
| Product | Distribution Channel | Proposed Development Strategies |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

#### 

4.3.4. Supply Chain Management

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

#### Outline the changes you intend to implement to shorten the supply chain to the end user. This could cover all or any of the steps from raw materials > manufacturer > distribution channels > retailers > consumers.

(Add or delete rows as required).

|  |  |  |
| --- | --- | --- |
| Supply Chain Management Checklist | | |
| Supply chain stage | Existing efficiency rating (Scale 1 to 10) | Proposed changes to shorten the chain |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

PROMOTION

4.4.1 Sales Force Management

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

This part of the plan is a summary of the status of existing sales force management functions and the steps you intend to take to improve them. Include reference to market coverage, call cycle frequencies, quality of sales calls, sales territory allocations, retail trade service and sales training. Complete this section even if the ‘sales force’ is limited to one person.

|  |  |  |
| --- | --- | --- |
| Sales management functions checklist | | |
| Function | Efficiency rating  (Scale of 1 to 10) | Proposed action |
| Sales reps coverage of potential market |  |  |
| Call cycle frequency |  |  |
| Quality of sales reps calls |  |  |
| Sales territory allocation efficiency |  |  |
| Quality of service to retail trade |  |  |
| Sales training quality |  |  |

4.4.2 Sales Development

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Summarize the techniques you intend to deploy to develop sales among existing customers to generate incremental business. These may include up selling, cross selling, volume discounts, reward programs, bundling and incremental selling.

|  |  |
| --- | --- |
| Sales development techniques - existing customers | |
| Product: | |
| Sales technique | Proposed actions |
| Up selling |  |
| Cross selling |  |
| Volume discounts |  |
| Reward programs |  |
| Bundling |  |
| Incremental selling |  |
| Other (Specify) |  |
| Comments | |

4.4.2 Sales Development (cont.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

|  |  |
| --- | --- |
| Sales development techniques - new customers | |
| Product: | |
| Sales technique | Proposed actions |
| Personal recommendation |  |
| Cold canvassing |  |
| Networking |  |
| Advertising |  |
| Internet marketing |  |
| Other (Specify) |  |

Now outline the techniques you will use to develop sales among new customers. These may include encouraging personal recommendation by existing customers, cold canvassing, networking, advertising and Internet or database marketing.

##### 4.4.3 Customer Service

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This is a summary of the main customer service functions and the actions you intend to take to improve them. Refer to the eBook for more information and guidance.

|  |  |  |
| --- | --- | --- |
| Customer service action list | | |
| Customer service functions | Efficiency rating  (Scale 1  to 10) | Proposed actions |
| Customer focus |  |  |
| Product knowledge |  |  |
| Customer communications |  |  |
| Customer relations |  |  |

ADVERTISING

4.5.1 Setting the Advertising Objectives

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Identify exactly what you want advertising to achieve. Define just one primary objective with any others set as secondary objectives. Ensure the objectives you set are realistic given the media you have selected, the material you will run and the budget you have allocated. State how you will measure the achievement of the set objectives. Typical advertising objectives start with verbs such as ‘Create’, ‘Announce’, ‘Build’, ‘Announce’, ‘Launch’, ‘Demonstrate’, and so on. It is not sufficient to say your advertising objective is to “increase sales’. All advertising is intended to increase sales but there are usually more specific things you need to achieve in order for sales to be increased. (Add or delete rows as required).

|  |  |
| --- | --- |
| Advertising objectives | |
| Advertising objective | How measured |
| PRIMARY |  |
| SECONDARY 1 |  |
| SECONDARY 2 |  |

* + 1. Advertising Responsibilities Allocation

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

Assign responsibilities for each part of the advertising planning and implementation process. This will ensure there is no doubt about ‘who is responsible for what.’

|  |  |  |
| --- | --- | --- |
| Advertising responsibilities allocation | | |
| Advertising function | Scheduled completion date | Person responsible |
| Advertising budget allocation |  |  |
| Setting the advertising brief |  |  |
| Media selection |  |  |
| Allocation of creative resources and development of creative material. |  |  |
| Advertising material approval |  |  |
| Media placement |  |  |

4.5.3 Setting the Advertising Budget

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced✓ | |

Setting the advertising budget is not straight forward as there is no standard formula. Consider all of the factors in the template before arriving at an acceptable and balanced spend level.

|  |  |
| --- | --- |
| Advertising budget – Year 1 of plan | |
| Considerations | Comments |
| Fixed % of budgeted revenue |  |
| Acceptable investment level |  |
| Past spend levels |  |
| Cost estimate on a line by line basis of media and production costs |  |
| Competitors’ estimated spend levels |  |
| Advertising budget allocation ($’s) |  |

4.5.4 Preparing the Creative Brief

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Whether you are creating the advertising ‘in house’ or assigning the task to external resources, the starting point in the creative process is to ensure that the brief is strategically sound. This requires clarity in defining the task and the resources available. The brief should be succinct and no more than a single page in length. The brief makes it clear what you expect and gives you a basis for evaluation of the creative interpretation of the brief.

|  |  |
| --- | --- |
| The Creative Brief | |
| Product or service: |  |
| Overall marketing objective: |  |
| Primary advertising objective: |  |
| Secondary advertising objective: |  |
| Target market: |  |
| Product proposition: |  |
| Product positioning: |  |
| Desired brand image: |  |
| Desired net impression: |  |
| Advertising budget: |  |

4.5.5 Media Selection

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

When selecting the most appropriate and cost effective medium or media for your message consider the range of selection criteria listed in the template below. It is preferable to concentrate on one medium and do it well rather than spread the budget too thinly across multiple media. For more information refer to the eBook Table 11. **(**Use text highlight colors to select options).

|  |  |  |
| --- | --- | --- |
| Media Selection Criteria | | |
| Product: | | |
| □ Cost effective reach of target market | □ Retention of ad for future reference | □ Ability to offer discount or other coupons |
| □ Show the product | □ List stockists | □ High impact |
| □ Color | □ Sound (audio) | □ Movement (video) |
| □ Short lead times | □ Low production costs | □ Detailed product benefits |
| □ List product specifications | □ Response rate measurement | □ Repetition |
| Preferred media option/s  □ TV □ Radio □ Newspapers □ Magazines □ Outdoor □ Cinema □ Social media advertising □ Third party websites □ Search engine advertising □ Yellow pages and other directories  □ Other (Specify) | | |
| Geographical markets we need to reach: | | |
| Budget allocated: | | |
| Conclusions and comments: | | |

4.5.6 Advertising Research

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

Advertising is often one of the most significant items in your marketing budget. You need the ability to gauge the extent to which your advertising is effective. Some of the simple and inexpensive measures you can use to measure effectiveness are store traffic measurement, coupon redemptions, dedicated telephone numbers, customer surveys, web site hits and anecdotal evidence from customers.

|  |  |
| --- | --- |
| Advertising research checklist | |
| Method | Comments |
| Measure store traffic before and after advertising |  |
| Redemption rate of discount and cashback coupons |  |
| Inclusion of dedicated telephone hotline number in advertisements |  |
| Telephone or on line customer surveys |  |
| Ask customers how they became aware of the product or service |  |
| Measure the difference in number of web site hits before and after advertising. |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Sales promotion planning schedule | | | | |
| Product: | | | | |
| Objective | Promotion type | Timing & duration | Budget  $ | Coordinator |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

4.6 Sales Promotion

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

The function of sales promotion is to provide an additional reason to influence purchase and to stimulate product trial. In setting out your sales promotion program list the objective for each promotion along with an outline of promotion types you have selected and why, the timing and duration of each and the budget. (Add or delete rows as required).

4.7 Trade Shows & Exhibitions

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

Trade shows and exhibitions are a legitimate and effective form of sales promotion. Outline any plans you have to participate in any activities of this kind with an indication of what you wish to achieve and what you propose to do.

|  |  |  |  |
| --- | --- | --- | --- |
| Trade shows and exhibitions activity schedule | | | |
| Product |  | | |
| Trade show name |  | | |
| Target market |  | | |
| Objective |  | | |
| Proposed activities |  | | |
| Timing & duration | | Budget  $’s | Coordinator |
|  | |  |  |

4.8 On-line Marketing & eCommerce

4.8.1 Website Functionality

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Summarize the functions you require from your website, the contents you want the site to include, the actions you will take to implement the various components, and how you will continue to maintain and improve the site. (Use text highlight colors to select your options).

|  |  |
| --- | --- |
| Website functionality requirements | |
| Product: | |
| What functions do we require from our web site? | 🞏 Showcase our products  🞏 Generate sales enquiries via contact links  🞏 Create database for sales leads  🞏 Conduct e-commerce transactions via the Internet  🞏 Content management system  🞏 Database email marketing facility  🞏 Other |
| Contents checklist | 🞏 Product range catalogue  🞏 Competitive advantages list  🞏 Company history, mission statement and executives profiles  🞏 e-mail contact facility  🞏 Shopping cart facility  🞏 Credit card transaction facilities |
| Content marketing | Continually create and post items of interest to our target market such as::  🞏 Blogs,  🞏 eBook  🞏 Press releases  🞏 Videos and podcasts |
| Action checklist | 🞏 Determine and assemble content  🞏 Engage web site designer  🞏 Appoint internet service provider  🞏 Appoint web server  🞏 Arrange merchant (credit card transaction) facilities  🞏 Exchange links with complementary sites |
| Maintenance checklist | 🞏 Continually improve and update web graphics and content 🞏 Continually improve products/ services featured on the site  🞏 Continue to seek new links with complementary sites  🞏 Continue to place strategic advertising on search engines/analyze results/refine markets/budgets and key words  🞏 Measure web site traffic data with Google Analytics and make adjustments based on the data reported. |
| Comments: | |

### 4.8.2 Website Promotion Strategies

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Indicate the steps you propose to take to promote your web site such as including your URL in all stationery, advertising and print materials. Outline your plans for search engine advertising. (Use text highlight colors to select your options).

|  |  |
| --- | --- |
| Website Promotion Strategies | |
| Product: | |
| Web site promotion checklist | **🞏** Include URL in all new stationery  **🞏** Include URL in all sales materials  **🞏** Include URL in all e-mail signatures  **🞏** Include URL in all print and advertising materials |
| Search engine optimization (SEO) | **🞏** Exchange links with related sites  **🞏** Submit the site to all major search engines including Google, Yahoo, Bing and AltaVista.  **🞏** Appoint a Search Engine Optimization (SEO) specialist to ensure the site is search engine friendly.  **🞏** Include ample high quality content in site |
| Search engine advertising | 🞏 Conduct trials with different keywords in Google’s ‘AdWords’🞏 Select the search engine/s with which we will advertise **🞏** Select target markets (countries/regions/cities/languages)  **🞏** Research and write ad text with proven keywords  **🞏** Set pricing – cost per click and budget per period  **🞏** Monitor ongoing results from online performance reports and modify strategy accordingly. |
| Comments: | |

4.8.3 Social Media Marketing

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Complete the template below after you have considered how you can extract the maximum benefit from social media marketing as it applies to your products or services. Consider the platforms you will establish that best meet your needs and objectives against your primary target market/s.

|  |  |  |
| --- | --- | --- |
| Social media marketing programs | | |
| Product: | | |
| Platform | Target market | Objectives |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Additional comment: | | |

### 4.9 Merchandising

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services X | | B2B Services X |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This section applies to products sold through retail outlets only. Describe the proposed merchandising activity by store or outlet type, the merchandising materials you will use, the funds and resources you will allocate. Include a schedule and an assignment of responsibility.

|  |  |  |
| --- | --- | --- |
| Merchandising Program – Year 1. | | |
| Retail Outlet/Store Type | Proposed Merchandising Activity | Proposed Merchandising  Materials |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Additional comment: | | |

4.10 Public Relations and Publicity

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

Describe the public relations and publicity programs you will implement and what they are intended to achieve, State the target markets the programs are aimed at, the media you will approach, the tools you will need and the budget allocated.

|  |  |
| --- | --- |
| Public relations & publicity activity program | |
| Product: | |
| Program description 1 |  |
| Objectives |  |
| Target market |  |
| Proposed media |  |
| Format |  |
| Budget allocated |  |
| Program description 2 |  |
| Objectives |  |
| Target market |  |
| Proposed media |  |
| Format |  |
| Budget allocated |  |

#### 4.11 Sponsorship

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate ✓ | | Advanced ✓ | |

Detail the activities or events you intend to sponsor (if any) and the benefits you expect to derive from these activities and the budget allocated

|  |  |
| --- | --- |
| . Proposed sponsorship programs | |
| Product: | |
| Program description |  |
| Objectives |  |
| Target market |  |
| Benefits |  |
| Budget allocated |  |

### 4.12 Corporate Communications

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

List the print and electronic corporate communications materials you have selected to promote your business and aid communications with your employees, customers, suppliers, and stakeholders such as corporate brochures, DVD’s, product catalogues, newsletters, sales presenters, presentation folders, flyers, mailers and annual reports, etc. Outline the objectives of each item and the target market they are intended to reach. (Add or delete rows as required).

|  |  |  |
| --- | --- | --- |
| Corporate communications materials program | | |
| Product: | | |
| Item | Communications objectives | Target market |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

4.13. Direct Marketing and Database Email Marketing

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Detail the direct marketing and/or database email marketing options you have selected to achieve the set objectives. These may be selected from options including direct mail, email marketing, telemarketing, telephone messaging, etc. State the objectives of each program and the audience they are intended to reach and influence. (Add or delete rows as required).

|  |  |  |
| --- | --- | --- |
| Direct marketing & database marketing programs | | |
| Product: | | |
| Program | Communications objectives | Target market |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

PART 5: FINANCIAL STATEMENTS

5.1. Marketing Budget

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

Customize the marketing budget categories to suit your individual requirements. Start with a “wish list” of all the things you think you need to achieve your goals and which you have included in your plan. Initially, this could be broken down into “like to do” and “need to do”. When you have added up the total cost you can start to eliminate the “like to do” items on a prioritised basis according to the priorities and financial resources available as determined by the factors you have considered in setting the budget such as percentage of gross revenue, etc. (Add or delete items and rows as required).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Marketing budget – Year 1 | | | | | |
| Item | Budget $ | Item | Budget $ | Item | Budget $ |
| MEDIA ADVERTISING |  | PRINT |  | OTHER |  |
| TV & radio |  | Corporate brochures & flyers |  | Public relations & publicity |  |
| Newspapers & magazines |  | Sales presenters |  | Trade functions |  |
| Cooperative trade advertising |  | Product catalogues |  | Marketing research |  |
| Outdoor advertising |  | Merchandising & display materials |  | Showroom upgrade |  |
| Social media advertising |  |  |  | Packaging materials design |  |
| Directory advertising |  |  |  | Product development |  |
| Media production costs |  |  |  | Sponsorships |  |
| Ad agency & consultants fees |  |  |  | Signage |  |
| SUB TOTAL |  | SUB TOTAL |  | SUB TOTAL |  |
| PROMOTIONS |  | ONLINE MARKETING |  | CONTINGENCY |  |
| Sales promotions - consumer |  | Website development & maintenance |  |  |  |
| Sales promotions – trade |  | Search engine advertising |  |  |  |
| Sales incentive schemes |  | Search engine optimization (SEO) |  |  |  |
| Trade shows & exhibitions |  | Database marketing |  |  |  |
| Promotional videos & DVD’s |  | Social media marketing |  |  |  |
| Direct marketing |  |  |  |  |  |
| Promotional merchandise |  |  |  |  |  |
| SUB TOTAL |  | SUB TOTAL |  | TOTAL MARKETING BUDGET |  |

This budget framework is not intended to be a comprehensive list of marketing budget items. Your business may use some of these items plus others not included that are appropriate to your product or service category

5.2 Financial Statement

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This is an examination of the fiscal practicality of the marketing plan and its ability to meet corporate expectations.The format is intended as a guide and need not be rigidly adhered to as there may be other accounting formats used by your company that are more appropriate. Depending on the degree of investment in the plan, in some cases, such as a new product launch, it might be acceptable to set ‘break even’ or even negative returns for a predetermined period. Write a brief commentary. (Add or delete rows as required).

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Marketing Financial Statement Years 1 to 3 | | | | | | | | | |
| $000’s | Year 1 | | | Year 2 | | | Year 3 | | |
|  | Pessimistic | Most Likely | Optimistic | Pessimistic | Most Likely | Optimistic | Pessimistic | Most Likely | Optimistic |
| SALES |  |  |  |  |  |  |  |  |  |
| Product 1 |  |  |  |  |  |  |  |  |  |
| Product 2 |  |  |  |  |  |  |  |  |  |
| Product 3 |  |  |  |  |  |  |  |  |  |
| Product 4 |  |  |  |  |  |  |  |  |  |
| TOTAL REVENUE |  |  |  |  |  |  |  |  |  |
| Direct costs |  |  |  |  |  |  |  |  |  |
| Product 1 |  |  |  |  |  |  |  |  |  |
| Product 2 |  |  |  |  |  |  |  |  |  |
| Product 3 |  |  |  |  |  |  |  |  |  |
| Product 4 |  |  |  |  |  |  |  |  |  |
| TOTAL DIRECT COSTS |  |  |  |  |  |  |  |  |  |
| Gross margin |  |  |  |  |  |  |  |  |  |
| % of sales |  |  |  |  |  |  |  |  |  |
| LESS OPERATING COSTS |  |  |  |  |  |  |  |  |  |
| Marketing |  |  |  |  |  |  |  |  |  |
| % of sales |  |  |  |  |  |  |  |  |  |
| Admin & overheads |  |  |  |  |  |  |  |  |  |
| % of sales |  |  |  |  |  |  |  |  |  |
| Total operating expenses |  |  |  |  |  |  |  |  |  |
| % of sales |  |  |  |  |  |  |  |  |  |
| EARNING BEFORE INTEREST & TAX (EBIT) |  |  |  |  |  |  |  |  |  |
| % of sales |  |  |  |  |  |  |  |  |  |

PART 6: IMPLEMENTATION & CONTROLS

6.1 Sales & Marketing Personnel Resources

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

This part of the plan addresses the personnel resources you will have in place to implement the plan. As this is *a marketing* plan this section is confined to sales and marketing employees and does not address administration, production and other departments. You can use an organization chart to show names, job titles, brief job descriptions and reporting lines.

Sales & marketing organization chart

Note: The above chart was created in Microsoft Word using SmartArt Graphics > Hierarchy tab. To edit text or boxes follow the steps required according to the version of Microsoft Word installed in your system.

6.2 Action Plan

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

The action plan should be adapted to suit your individual plan. The key development stages only such as new product development, packaging, distribution advertising and promotions should be entered here. These will vary according to whether you are marketing a product or service, or a new or existing product etc. (Add or delete rows as required).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Action Plan | | | | |
| Development stage | Action steps | Target completion date | Person responsible | Results achieved |
|  |  |  |  |  |
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6.3 Implementation Schedule

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic ✓ | | Intermediate ✓ | | Advanced ✓ | |

This schedule shows the integration of each of the main elements of the plan. The aim is to ensure that each component part is completed in time for the implementation of the next part of the plan. **Enter the key plan stages as appropriate to your plan. Add or delete rows and columns as required. Draw stage periods with Microsoft Word line tool from Insert tab>Shapes>Lines. (Add or delete rows and columns as required).**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Implementation schedule** | | | | | | | | | | | | | | | | | | | | |
| **Plan Stage** | **Timing** | | | | | | | | | | | | | | | | | | | |
|  |  |  |  |  |  |  |  |  | **F**J | **A**F |  |  |  |  |  |  |  |  |  |  |
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| **Month** | **J** | **F** | M. | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A |
|  | Year 1 of Plan | | | | | | | | | | | | Year 2 of Plan | | | | | | | |

6.4. Review & Evaluation Schedule

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Business class | B2C Products ✓ | B2B Products ✓ | | B2C Services ✓ | | B2B Services ✓ |
| Plan level | Basic X | | Intermediate X | | Advanced ✓ | |

This schedule reviews the progress you have made after a specified period (usually a year). It evaluates progress and estimates effectiveness and suggests any changes based on your experience to date. Proposed changes should be incorporated in an updated plan for Year 2. **Enter the key plan elements as appropriate to your plan. (Add or delete rows as required).**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Review and Evaluation Schedule** | | | | |
| **Plan element** | **Progress Evaluation** | **Effectiveness**  **(1 – 10)** | **Proposed Changes** | **For action by** |
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1. The BCG matrix was created by Bruce Henderson of the Boston Consulting group in 1970 as an aid to analysing business units or product lines. [↑](#footnote-ref-1)