




[Your Company Name]


# MARKETING PLAN


---

[Your Tagline]


**Prepared By**

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1.

## Executive Summary



**REMEMBER**

You are advised to complete this section of your marketing plan last. You might include a brief overview of your :

- Products and/or services
- Target market

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*Start Writing here...*



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# 2.

## Market analysis

Target market

PEST analysis (Environmental Analysis)

SWOT analysis

Consumer Analysis

Competitor profile



### REMEMBER

Examine whether or not your industry is growing, maturing, or declining.

If it is declining, identify the problems that exist and be able to change the ones you can. Show how you can adapt to changes that you can't control.

If your industry is maturing, show how as a new com

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## Target market



### TIP

Summarize the key statistics for your target market. This may include the size and growth potential of your market, as well as key demographics such as age, gender, income level, etc.

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### TIP

A PEST analysis is useful for any organization that needs to gauge current and future markets. The significance of each area in PEST Analysis will vary for different industry sectors. The framework examines opportunities and threats due to Political, Economic, Social, and Technological forces. Outputs from the analysis inform strategic planning processes and co

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## PEST analysis (Environmental Analysis)



### TIP

Identify any political and legal factors that may affect your business.

- Is your industry highly regulated or is it under the government radar?
- What impact does regulation have on the industry and the success of your business?

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### Political

Start writing here...



### TIP

What are some of the economic factors that may affect your business?

For example, unemployment rates, exchange rates, availability of labor.

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### Economic



Start writing here...



**TIP**

What are some of the social and cultural factors that may affect your business?

For example, an aging society, education levels, residential trends.

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## Social

Start writing here...



**TIP**

What are some of the technological factors that may affect your business?

For example, growth in e-commerce, internet access, emerging digital technologies.

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## Technology

Start writing here...

## SWOT analysis

## Strengths

*Mention positive tangible and intangible attributes. Internal to your organization. which are within the organization's control.*

S

## Weaknesses

*Factors that are within an organization's control that detract from its ability to attain the core goal. In which areas might the organization improve?*

W

## Opportunities

*External attractive factors that represent the reason for an organization to exist and develop. What opportunities exist in the environment which will propel the organization?*

O

## Threats

*External factors, beyond an organization's control, which could place the organization's mission or operation at risk. The organization may benefit by having contingency plans to address them should they occur.*

T

## Consumer Analysis



TIP

Identify your target market, describing how your company will meet the needs of the consumer better than the competition does. List the expectations consumers have for your type of product. Since demands may be different, products and services will vary between competitors. Quality, price, and after-sales service are just some of the areas where this

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Start Writing here...

## Competitor profile



TIP

- What's the profile of a typical competitor for your business?
- What marketing mix do they use? Have you identified any gaps in their marketing strategy?

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# 3.

## Market segmentation and customer analysis

Market segmentation

Market research findings

## Market segmentation



TIP

Outline how your customers can be segmented based on their location.

For example by suburb location, metropolitan vs regional, interstate, and overseas

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### Geographical

*Start writing here...*



TIP

Segmentation based on Age, gender, education level, income, occupation, etc

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### Demographics

*Start writing here...*



TIP

Segmentation based on loyalty, attitude, readiness to buy, usage rates, etc

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### Behavioral

*Start writing here...*



TIP

Segmentation based on social class, personality, personal values

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### Lifestyle

*Start writing here...*

## Market research findings



**TIP**

What statistical information have you reviewed to help you understand the market?

If you have surveyed potential customers, competitors, or suppliers, provide a summary of your results.

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*Start Writing here...*

# 4.

## Your Customers

Target customers

## Target customers



**TIP**

Who are your target customers and how do they behave? Include specific demographics such as age, social status, education, and gender. What are your customers' lifestyles, activities, values, needs, interests, or opinions? Where are they located? Please adjust the column headings as required.

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Customer	Age	Gender	Education	Location	Values	Interests
insert Target customer – choose a name	insert Customer's Age	insert Customer's Gender	insert Customer's education level	insert Customer's location	insert Customer's values	insert Customer's interests



**TIP**

What's the profile of an ideal customer for your business?

In a paragraph or two, clearly define your ideal customer - their needs, buying patterns, and motivations for buying. This process will help you to develop a mental image of your ideal customer (often referred

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## Customer profile

*Start writing here...*

# 5.

## Your Competitors

Competitor analysis

Competitor profile



## Competitor analysis



TIP

Use the table below to analyse at least 5 competitors

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Competitor	Established date	Size	Market share (%)	The value offered to customers
insert the Competitor's name	insert When was their business established?	insert Number of staff and/or turnover	insert Estimated percentage of market share	insert Unique value to customers, e.g. quality, price or customer service?

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## Competitor profile



TIP

What's the profile of a typical competitor for your business?

In a paragraph or two, clearly define a typical competitor - their size, market share, unique value proposition, strengths, and weaknesses. This process will help you to develop a mental image of your typical competitor.

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## Competitor name

# 6.

## Objectives and goals

Mission statement

Marketing objectives

Goals

## Mission statement



TIP

Outline your mission statement

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*Start Writing here...*

## Marketing objectives



TIP

Outline the marketing objectives that will help you achieve your mission

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*Start Writing here...*



TIP

Compare your prospects for future sales with either past performance, or a general industry performance report. By analyzing the industry average as well as your own performance you will demonstrate to the reader that you can look "beyond your borders" to the competition to give yourself an idea of how well you are performing, or what general difficulties the v

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## Sales Objectives

*Start writing here...*



TIP

Include your predictions for after-tax profit for each of the next five years. Relate this profit assumption based on the contents of your operating budget's costs figures found in your Business Plan.

Indicate how you will reinvest your profit margin in s

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## Profit Objectives

*Start writing here...*



**TIP**

Focus on the weaknesses of your competitors by offering better quality at a competitive price. Remember what your own attitudes are towards products you consume on a day to day basis. Remember how you react to high prices for poor or marginal quality or service.

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## Pricing Objectives

*Start writing here...*



**TIP**

Much like what you would be doing for your prices, focus on the wants, needs, and perceptions of your consumers and the general public. Identify any problems for your industry/product.

Show how you will attract more customers while keeping prices low.

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## Product Objectives

*Start writing here...*

## Goals



**TIP**

What are your short and long term goals? Include details of how you will measure and achieve these goals and the expected time-frame

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*Start Writing here...*

# 7.

## Marketing strategies

Pricing strategy

Product strategy

Place(Position) strategy

Promotional strategy

People strategy (salespeople, staff etc.)

Process strategy (Buying experience)

Physical Environment

Productivity Strategy



**REMEMBER**

Use this section to detail the overall strategy you will use to position yourself within the market to meet your customers' needs. Whatever your strategy, your goal should be to differentiate yourself from your competitors to encourage customers to choose your business first. The specific elements that make up your marketing strategy are typically referred to as t

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## Pricing strategy



**TIP**

Price is a critical component of your marketing mix. Why? Because choosing the right price for your products or services will help you to maximize profits and also build strong relationships with your customers. By pricing effectively you will also avoid the serious financial consequences that can occur if you price too low (not enough profit) or too high (not end

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Product or Service	Price	Costs	Net Profit	Comp. Price	Value
What is your product or service?	What is the price of your product or service?	What is the total cost of selling your product or service?	What Net Profit is made from selling your product or service?	What is your competitor's pricing for this product or service?	What unique value does your product or service offer/deliver?

## Product strategy



**TIP**

Here you should describe your long-term product strategy in detail. If you are providing a service then you should consider your service(s) as your product(s).

You will need to consider:

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Product or Service	Features	Benefits	Unique Selling Position	Support	Spin-Offs
What is your product or service?	What are the features of your product or service?	What are the customer benefits of your product or service?	What makes your product or service unique?	What additional support do you offer? E.g. warranty, money back, etc.	Are there any potential spin-off products or services you can offer?

## Place(Position) strategy



TIP

Place refers to the channels and locations for distributing your product, related information, and support services. This is how you will position your product or service in the marketplace. This includes:

- The place where the product/service can be bought

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### Sales and distribution channels:

Channel type	Products/services	Percentage of sales (%)	Channel strategy
e.g. Shopfront, internet, direct mail, export or wholesale.	List all the products/services sold via this channel	What percentage of overall sales do you expect to sell via this channel?	Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?

Channel type	Products/services	Percentage of sales (%)	Channel strategy

## Promotional strategy



**TIP**

State how you currently promote and market your business now (or intend to). Compare (where applicable) what your competitors do for promotion, noting what does and doesn't work for them as well as yourself. Regardless of how good your business is, if you don't promote it and tell people you exist, it's unlikely you will make many sales.

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Product or Service	Online	Public Relations	Advertising	Promotion	Packaging	Branding
What is your product or service?	What online strategies are you using?	What PR strategies are you using?	What advertising strategies are you using?	What promotion strategies are you using?	What packaging strategies are you using?	What branding strategies are you using?

## People strategy (salespeople, staff etc.)





TIP

Every employee in your business (if you have them) can influence the marketing of your products and services. The knowledgeable and friendly staff can contribute to creating satisfied customers and can provide the unique selling experience that an organization is often seeking. If an outstanding team provides a competitive advantage, then the quality of

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Name	Job Title	Department	Responsibilities
e.g. Mr. Chris Brantley	e.g. Marketing/ Sales Manager	e.g. Sales	Insert the main responsibilities of this position

## Process strategy (Buying experience)



TIP

The process represents the buying experience that the customer experiences when they buy your product or service. For example, the way that a fine bottle of wine is presented and served in a restaurant, the reaction of a business to a complaint, or the speed of delivery in a fast food outlet

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Product or Service	The Process	Key Benefits	Improvements
What is your product or service?	Outline the Process in point form	What are the key benefits for the customer?	What changes can you make to improve the process?

## Physical Environment



**TIP**

The physical environment where your products or services are sold and delivered can have a significant impact on how your customers experience your business. The physical environment represents the tangible aspects of selling your products and services, such as the quality of the furnishings in your consulting rooms or the design of your reception area.

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Name	Selling Environment	Delivery Environment	Improvements
What is your product or service?	Where is the product or service sold?	Where is the product or service delivered?	What changes can you make to improve the Physical Environment?

## Productivity Strategy



**TIP**

Improving productivity is an important factor in cost management; however, it also plays a key role in satisfying customers' needs. The more effective and efficient your marketing efforts are the more satisfied customers your business will create at a lower cost.

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Name	Job Title	Department	Responsibilities
e.g. Mr Chris Brantley	e.g. Marketing/ Sales Manager	e.g. Sales	What are the main responsibilities of this position?

Name	Job Title	Department	Responsibilities

# 8.

## Budget and risk management

Marketing Budget

Risk Assessment

# Marketing Budget



**TIP**

Provide details of your marketing budget. To complete this marketing budget, you should rely heavily on your financial statements and projections. Double-click the table below to enter your details or attach your own budget at the back of this marketing plan.

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## Marketing Plan:

Item	Year1	Year2	Year3	Year4	Year5
<b>Marketing/promotion</b>					
Marketing agency					
Radio advertising					
Television advertising					
Print advertising					
Online advertising					
Social media					
Web search optimization					
Mailouts					
Giveaways					
Events					
Branding & artwork					
Merchandising					
Publications					
Catalogs					
More...					
<b>Marketing/ promotion total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>					
Research					
Travel					

Item	Year1	Year2	Year3	Year4	Year5
Postage					
Administration					
Incidentals					
More...					
<b>Other total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## Risk Assessment

Risk description	Likelihood	Impact	Strategy
Description of the risk	Highly likely, likely, possible, unlikely, highly unlikely	High, medium, low	What actions will you take to minimize the potential risk to your business?

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