MARKETING PLAN WORKSHEET

# STEP 1: SITUATIONAL ANALYSIS

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| ***BUSINESS NAME*** |
| ***MISSION STATEMENT***What is your company’s main purpose? How does your company provide value to its customers? |
| ***SWOT ANALYSIS***Brutal honesty is imperative for a truly insightful SWOT. Use bullets and aim for 3–5 in each section. |
| POSITIVE | NEGATIVE |
| INTERNAL | *STRENGTHS*What we’re good at. What’s working. What our customers like about us. | *WEAKNESSES*What we want to fix. What we want to strengthen. What we want to become more efficient at. |
| EXTERNAL | *OPPORTUNITIES*What the industry might soon want.What we think we’ll be good at. What will be our difference- maker. | *THREATS*What we think could hinder our growth. What/who we think could take our customers. |

STEP 2: GOALS/OBJECTIVES

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| ***UNIQUE SELLING PROPOSITION***Use the SWOT analysis to identify what makes you different than similar products, places, or people? What earns you a special place in the minds of your potential customers? |
| ***GOALS/OBJECTIVES***Identify 1-3 specific, measurable, attainable, relevant, and time- bound goals/objectives. Goals/objectives should be obtainable, but not easy.1.2.3. | ***KEY PERFORMANCE INDICATORS***For each goal/objective, indicate how you will measure success and progress.1.2.3. |

# STEP 3: TARGET AUDIENCE

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|  | *PERSONA NAME 1* | *PERSONA NAME 2* | *PERSONA NAME 3* |
| ***DEMOGRAPHICS***Gender, age, socioeconomic status, occupation, location, etc. |  |  |  |
| ***PSYCHOGRAPHICS***Likes, dislikes, hobbies, etc. |  |  |  |
| ***NEEDS/GOALS***(in relation to the service your business provides) |  |  |  |
| ***CHALLENGES/ PAIN POINTS***(in relation to the service your business provides) What gets in the way of your persona achieving his or her goals?About what do they get frustrated? |  |  |  |
| ***SHARED VALUES***What value can your business bring to your buyer persona? Why would they choose to follow your accounts or visit your site? |  |  |  |

STEP 4: STRATEGIES AND TACTICS

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|  | *PERSONA NAME 1* | *PERSONA NAME 2* | *PERSONA NAME 3* |
| ***GOAL/OBJECTIVE***Which goal/objective canthis persona help you meet? |  |  |  |
| ***MESSAGE/VALUE PROPOSITION***Use “shared values” cell from Step 3 to determine messaging that appeals tothis persona. |  |  |  |
| ***STRATEGIES TO REACH THEM***An approach to achievingthe objective. |  |  |  |
| ***TACTICS***Tactics are the specific tasks/channels you’ll use to communicate directly with a specific persona. |
| *PAID**Ex:* Ads (video, print, so- cial media, radio, outdoor, etc.) |  |  |  |
| *EARNED**Ex:* Press releases, op- eds, influencer marketing, PSAs, media tours |  |  |  |
| *SHARED*You produce the content - customers share it (most social media content falls in this category) |  |  |  |
| *OWNED*You have complete control over these channels (email, website, blog, social media content,newsletter, etc.) |  |  |  |

# STEP 5: BUDGET

Your marketing budget is up to you! Most small businesses allocate between 5 and 10 percent of gross revenue to marketing.

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| ***ITEM NAME***Break down by tactic or channel; don’t forget hardware, soft- ware and staffing | ***PROJECTED BUDGET*** | ***ACTUAL COST*** |
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NEXT STEPS ... IMPLEMENTATION AND TIMELINE.

Make a detailed timeline of marketing activities you plan to complete each month.