

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 can  this persona help you meet? |  |  |  |
| ***MESSAGE/VALUE PROPOSITION***  Use “shared values” cell from Step 3 to determine messaging that appeals to  this persona. |  |  |  |
| ***STRATEGIES TO REACH THEM***  An approach to achieving  the 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.