



MARKETING PLAN WORKSHEET

STEP 1: SITUATIONAL ANALYSIS

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	<p>STRENGTHS What we're good at. What's working. What our customers like about us.</p>	<p>WEAKNESSES What we want to fix. What we want to strengthen. What we want to become more efficient at.</p>
EXTERNAL	<p>OPPORTUNITIES What the industry might soon want. What we think we'll be good at. What will be our difference-maker.</p>	<p>THREATS What we think could hinder our growth. What/who we think could take our customers.</p>



STEP 2: GOALS/OBJECTIVES

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

	<i>PERSONA NAME 1</i>	<i>PERSONA NAME 2</i>	<i>PERSONA NAME 3</i>
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

	<i>PERSONA NAME 1</i>	<i>PERSONA NAME 2</i>	<i>PERSONA NAME 3</i>
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, social 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.

ITEM NAME	PROJECTED BUDGET	ACTUAL COST
Break down by tactic or channel; don't forget hardware, software and staffing		

NEXT STEPS ... IMPLEMENTATION AND TIMELINE.

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