

# Small Business Marketing Plan Template

## **Part One: Know Your Company**

a. *Establish Goals—What do you want to accomplish?*

What are your organization's three main goals for the next 12 to 18 months?

- 1.
- 2.
- 3.

b. *Conduct a Situation Analysis— What makes you unique? What distinguishes your company?*

**Know your strengths, weaknesses, opportunities and threats. List them here:**

Strengths

Weaknesses

Opportunities

Threats

- 1.
- 2.
- 3.
- 4.
- 5.

## **Part Two: Know Your People—Define Your Target Audience**

- a. *Identify the three groups of people whose help you need AND are most likely to help OR most risky not to engage*

Who can you serve most effectively?

- 1.
- 2.
- 3.

- b. *What does your target audience value?*

- 1.
- 2.
- 3.

- c. *What are some common characteristics your customers share?*

- 1.
- 2.
- 3.

## **Part Three: Know Your Messages, Methods and Inbound Tactics**

- a. *Framing the Message*

- What are the Benefits You Offer: Why should your customers care? What's it in for them?
  - 1.
  - 2.
  - 3.
- What are the Barriers You Face: What's in the way of you attracting and retaining top quality customers?
  - 1.
  - 2.
  - 3.

*b. Best Methods—To achieve your marketing goals*

How can you best motivate your customers? Prioritize your options – which include:  
Branding/Positioning, Message Development, Content Creation, Relationship Building

- 1.
- 2.
- 3.
- 4.
- 5.

*c. Best Tactics—Put your methods into action*

- 1.
- 2.
- 3.
- 4.

**Part Four: Put It All Together**

*a. Resources—What it takes*

Time Commitment - Roles and Responsibilities

Who does what?

How much time will it take?

Is training needed?

Financial Commitment - Budget

How much does the initiative cost?

Track ROI – look at expenditures and results.

*b. Benchmarks and Measurement— Get to goal*

*Benchmarks: What are three to five concrete, specific and measurable (when possible) steps to achieve each marketing goal?*

- 1.
- 2.
- 3.
- 4.
- 5.

Ask yourself - What is working best?

Which activities are driving customer loyalty?

What content is most compelling?

What messaging generates action?

- c. *Step-by-Step Work Plan—Start with a 30-day plan, begin implementation then build out your plan to 90 days*

Elements: Create a spreadsheet that includes every task that needs to be done, who tackles each task, start date and deadline for each task.