10 Parts of a Marketing Plan Worksheet:

Not all plans will be detailed at all levels. It may seem intimidating to create a full 10 part plan – so keep the framework in mind and try to fill out as many areas as you can.

Write down your thoughts on where your organization is **now** … and think also about where you'd like your plan to be after this workshop and further study.
If you need a refresher on the 10 Parts of a Marketing Plan before completing the worksheet – see the end of this document (p7).

- ❑ ***Organizational Purpose***
  What is your 'why'? How is what you do different than others?

  _____

  _____

- ❑ ***Market situation analysis***
  What are the problems, changes or opportunities your organization faces right now? What's happening in your community? What is affecting your users? What's happening in your local economy? Are there political changes that could affect your organization? *[may need extra pages for this SWOT analysis, Environmental scan exercise*]

  _____

  _____

  _____

  _____

- ❑ ***Goals + Objectives***
  What specifically do you want your organization to achieve in the next year? How will you know when you've gotten there?

  _____

_____

_____

- ***Define your target market***

  Does geography affect your organization? _____

  What do you know of the demographics of your users, donors, stakeholders or other targets?

  _____

  _____

  Psychographics (attitudes, beliefs, behavior patterns)? _____

  _____

  _____

- ***Positioning, Branding***

  Position = the 'available and meaningful' niche you can fill in your prospect's mind

  What is yours now? _____

  _____

  What could it be? _____

  _____

  What do you want people to remember about your organization?
  When they your name?

  _____

  _____

  _____

Do you have or use a tagline now? If not, what keywords might you use?

_____

_____

- ***Marketing Strategies*** – the classic Ps of marketing
  - *Product* – are you changing/adding to your services? Will you emphasize something different in the next 6mo? 12mo?

    _____

    _____

  - *Place / distribution* – will you change how your users access your services? Will you change anything you offer online? Will you add other organizations or partners to help you expand your reach?

    _____

    _____

  - *Pricing* – over course of this marketing plan will you change your prices? Will you add a new tier or package of services (lower or more premium)? Is there an opportunity for specials, deals or loyalty programs in your organization? *[even if you don't charge for items – there are costs involved w/ your services – what are they? How much do users save by using your services? Do you have fees that might change?*]

    _____

    _____

  - *Promotion* – the actual tactics you're currently using + ones you might use this year. Any paid advertising? Press releases or publicity? Online or offline efforts?

    _____

    _____

_____

_____

_____

- ***Tactics***

  How will you implement your strategies? What specific actions will you take to promote your services, or your price changes, or your new referral partnerships?

  Will you use: Direct mail Email marketing Brochures

  Rack cards or flyers PPC ads Ads in local publications Radio

  Newspapers other paid digital media mobile marketing/ads

  Newsletters Videos Social Media (which platforms?)

  Landing pages Events Webinars / Teleseminars

  Speaking engagements Bulletin boards Sponsorships

  Will you launch a new service or program – what efforts to support it?

  _____

  _____

  _____

- ***Budget + Resources***

  You need to plan how much of your money **and** your time will go to marketing efforts over a specified time period. Planning/budgeting time is important – because 'free' marketing isn't really free – it always costs at least your time. And your time (or your staff's) may cost even more than a comparable paid tactic.

e.g. How much will it cost (in time, money, staff, resources) to design and print cards, posters, flyers or signage? Stationary? Other collateral? Design your social media graphics? Your website?

Will you need to:

Hire a web designer? _____

Hire someone to design your email newsletter? _____

Pay for premium accounts for social media tracking / monitoring?

_____

Social media 'promotions,' 'sponsored' posts or paid ads?

_____

Buy software / web services for: Webinars, Landing pages, email marketing

_____

How many hours per week will you spend on marketing efforts?

_____

_____

- ***Schedule***

  Time to map your activities out so things don't get lost. Use a master calendar - log all organizational events, meetings, holidays, special promotions, industry events, etc

  Create an editorial / content calendar

  Create a marketing calendar – if you are launching something, planning an effort leading up to an event, then you need to work backwards from launch/event date

  How much time in advance will you need for each activity ?

  _____

  _____

- ***Long Range***

  In your current marketing plan also be planning ahead - think about what growth opportunities might be coming. Take time to think and research in advance.

  What would like to be working on in 2016, 2017?

  _____

  _____

  _____

  What efforts can you NOT focus on this year, but might in 2016, 2017?

  _____

  _____

  _____

10 Parts of a Marketing Plan –

Let's recap the ten parts of a solid marketing plan.

1. ***Business purpose*** – why did you get into this in the first place?

2. ***Market situation analysis*** – what are the problems, changes, opportunities your business or organization faces, right now.

3. ***Goals and objectives*** –

    a. Goal = define WHAT you want your marketing to achieve

    b. Objectives = HOW will you know if you got there (your goal)

    c. At every new opportunity, potential tactic – ask if it will help you meet your goal? Will it help to support objective? If not, move on.

4. ***Define your market*** – your target and **all** you know about them or can learn; speak in their 'language'

5. ***Positioning, Branding*** –

    a. Position – the 'available and meaningful niche' that only your org can fill in a prospect's mind

    b. Brand = the set of characteristics, attributes, implied promises that people remember and trust to be true about your org [see – so much more than a logo or tagline]

    c. Creative Strategy – how you will follow and implement your positioning and branding across all your communications

6. ***Marketing Strategies*** – the classic Ps of marketing theory

    a. Product

    b. Distribution / Place

    c. Pricing

d. Promotion- the actual tactics of outreach

7. ***Tactics*** - how are you going to implement your strategies? What are you going to do? What media/channels?

8. ***Budget*** – not just of $$, but time; b/c even free marketing isn't 'free'; you can't do marketing with your 'left over time';

9. ***Schedule*** - map it out; pull the strategies and tactics together to see the whole picture; use a calendar

10. ***Long term*** – what growth opportunities do you see coming? What might you need to do or market for/to in the next year or so?

Additional Notes:

3 Parts to Core Marketing Strategy Process

1. ***Analysis*** – of your customers/users/patrons, your market, your competition, your environment

You have to know where you are before you can understand where you want to go, what you want to change in your current situation. If you don't really understand your audience (your customers, your users) you won't know what they really want and need, what will resonate with them.

Consider a SWOT analysis – even a simple one. It can be a useful tool.

You need to get really detailed on your target audience(s). Not just demographics but their attitudes, their behaviors, their preferences. What are they looking to do, to solve, to make go away or get better at – that YOU offer a solution for? What happy things, pleasures or gains are they looking for?

2. Creating a Marketing Strategy List

Give your goals, your situation and your audience – you can now think of potential

strategies to use. Is there a key influencer that your target audience really listens to and trusts? Maybe one of your strategies is building a relationship with that influencer – and having them help you talk to your audience. [This isn't when you worry about HOW you will do this – just list the potential strategies that fit]

Work on a good sized list of all potential strategies – then narrow down to 3-5 (at most) that best fit your current situation and your current goals.

3. Prioritize your Tactics

Which discrete activities fit which strategies … and your goals? If an action or activity isn't going to clearly impact your target, set you apart, and tell y our message in a compelling manner – don't do it.