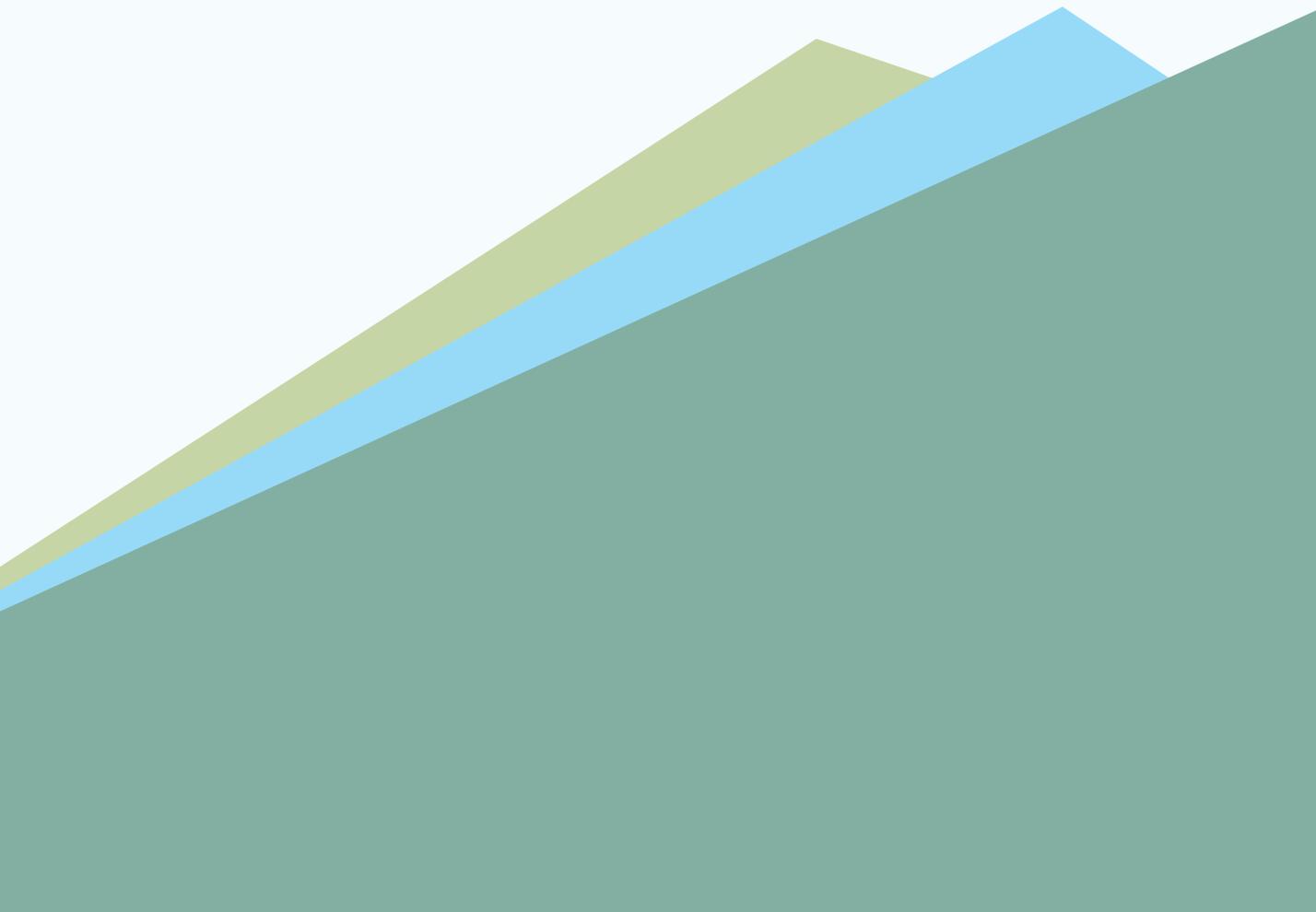


# Branding & Marketing Plan

Company name: \_\_\_\_\_

Date: \_\_\_\_\_

Prepared by: \_\_\_\_\_



# Instructions

Fill in and tear-off pages at end of each chapter to build your Marketing Plan as you work through this guide. Use this page as the cover for your working document.

# Branding and Marketing Plan – SWOT Analysis

## SWOT ANALYSIS

Complete a basic SWOT analysis of your company by identifying a few key points about the internal strengths and weaknesses of your company as well as opportunities and threats from external forces in the food and beverage industry.

<b>STRENGTHS (Internal)</b>	<b>WEAKNESSES (Internal)</b>
<hr/>	<hr/>
<b>OPPORTUNITIES (External)</b>	<b>THREATS (External)</b>
<hr/>	<hr/>

# Branding and Marketing Plan – Business Goals

Company: \_\_\_\_\_ Date: \_\_\_\_\_

Prepared by: \_\_\_\_\_

Marketing plays a key role in supporting your overall business goals. But you need clearly defined goals in order to achieve them.

Write down the top business goals for your company. Try to keep goals as concise as possible; be more specific than “make more money” or “sell more product.” Think S.M.A.R.T. (specific, measurable, achievable, relevant and timely).

Here are some other things to consider when creating your goals:

- What consumer behaviour are you trying to change?
- Are you looking for brand share increase (i.e. pick me first)?
- Is repeat purchase your goal (i.e. make it part of your everyday)?
- Do you want to offer product trial (i.e. try our new product)?
- Are you creating a brand extension (i.e. add on to existing product line)?
- For B2B organizations, is loyalty an objective (i.e. stay with us)?

## Business goals:

1.

2.

3.

# Branding and Marketing Plan – Your Customer

**Q1. Define your customer:** Identify your targeted customer(s)

(Circle those that apply to your business)



Notes:

**Q2.** Describe your customer. (e.g. location, gender, age, education, income level, lifestyle, values, etc.)

**Q3.** What are the top food trends affecting your customer? (e.g. seasonality, convenience, health and wellness, local, functional, etc.)

**Q4.** What are your customer's media habits? (e.g. newspapers, TV, magazines, radio, TV, direct mail, cell phone, online, etc.)

**Q5.** What product attributes are important to your customers? (e.g. serving size, packaging, ingredients, taste, price, etc.)

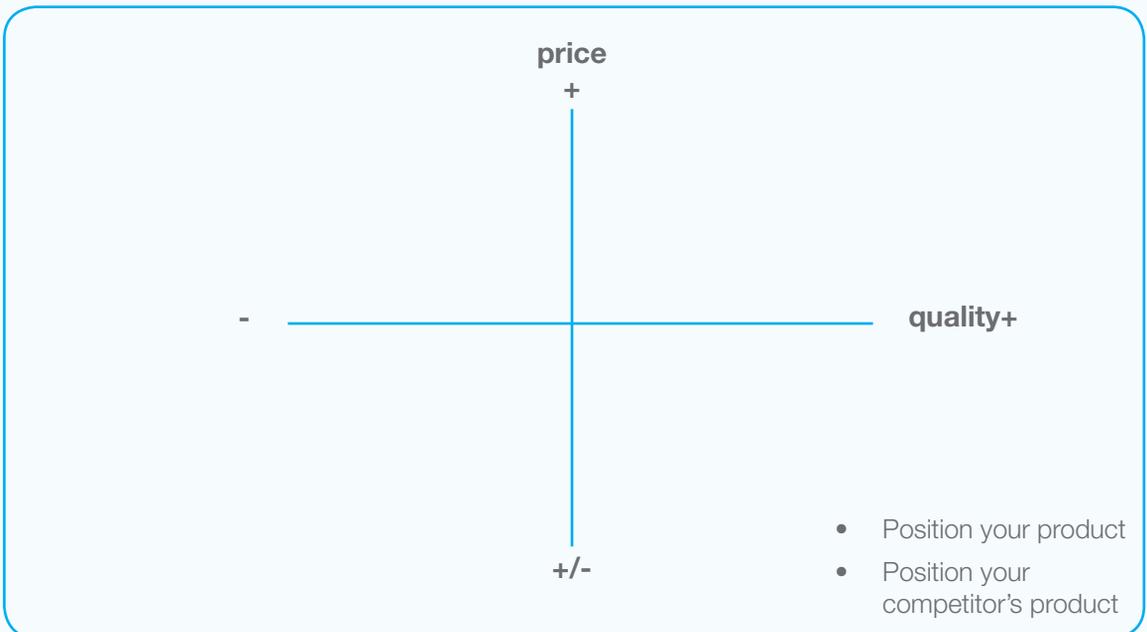
# Branding and Marketing Plan – Your Competition

**Q1.** Who are your direct and indirect competitors? How large are they in comparison to your company?

.....

.....

**Q2.** On the following graph, position your brand in comparison to your main competitors.



**Q3.** How do your product attributes compare to your leading competitor's products? (e.g. serving size, packaging, ingredients, taste, price, etc.)

.....

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.....

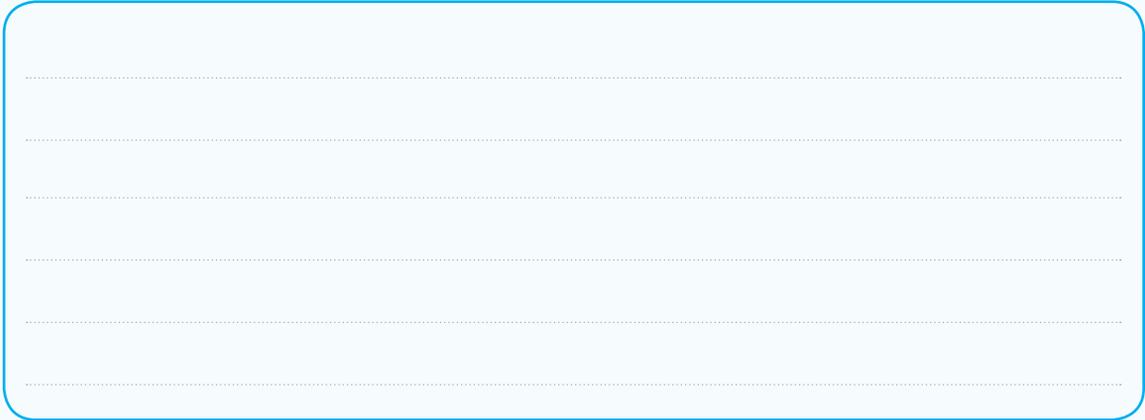
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## Branding and Marketing Plan – Your Competition

**Q4.** What processes have you established to keep your industry intelligence and competitor profiles updated?



A large rounded rectangular box with a blue border and horizontal dotted lines for writing, intended for the user to provide their answer to the question above.

# Branding and Marketing Plan – Market Position

Market positioning is all about finding a comfortable niche that your brand will fit into in the market – one that will allow it to grow, set apart from the competition. It also guides your ongoing decision-making process with regard to the four Ps of market positioning – product, pricing, placement and promotion.

**Product:** Having a thorough understanding of the products on the shelves – yours and your competitors – can allow you to use different techniques and methods to present your products to customers.

**Q1.** How do you define your product’s attributes, features and consumer benefits?

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**Pricing:** Your product must be priced not only to meet your business goals, but it must also be priced in accordance with competitive activity.

**Q2.** Is your brand a premium brand or a value proposition?

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**Q3.** What is our pricing strategy?

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**Placement:** How you get your product to market is an essential marketing strategy that will impact every step of your product’s value proposition.

**Q4.** How is your product distributed?

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**Q5.** Who manages the relationship with your end consumer?

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**Promotion:** The promotion element of marketing gets the most attention, but it should be the final step in the marketing process.

You will complete a current and future tactical mix exercise in an upcoming worksheet.

# Branding and Marketing Plan – Key Messages

## ELEVATOR SPEECH & KEY MESSAGE EXERCISE

An “elevator speech” is a good way of thinking about your brand in a clear, simple way. Imagine you enter an elevator and realize you’re heading to the 14th floor with one other person. The doors close, and that person says, “So, what business are you in?” Can you describe what you do in the time it takes for the elevator to reach your destination?

### Question: “What do you do?”

- 1. Answer (Incorrect):** *“I own a bakery.”* This says nothing about you, and is not compelling.
- 2. Answer (Correct):** *“My company produces the market-leading brand of packaged bagels in south-western Ontario.”* You have established a key strength – this statement suggests a huge, consistent customer base, which equates credibility and product excellence.
- 3. Answer (Correct):** *“I own a regional bread-making company that distributes our products across south-western Ontario as a white-label house-brand for major retailers.”* This shares your targeted customer base, and your key competencies – clear and directed communication.
- 4. Answer (Correct):** *“I manufacture a brand of artisanal flatbreads, new to Ontario, that feature locally-sourced Ontario grains – we’re in the process of securing new distributors.”* This sentence conveys key attributes about you – not only product strengths, but your needs as well. You never know who may be in the position to help you.

Write down how you would describe what you do, your “elevator speech”:

.....

.....

.....

Your “elevator speech” should be your primary key message, but it is important to take a moment to write five things you want people to know about your company or product, these are your key messages – and be as concise as possible:

1. ....

2. ....

3. ....

4. ....

5. ....

# Branding and Marketing Plan

## – Brand Health Checklist

Many people will view your brand as something different from your product: your brand is the sum total of all impressions about your company, product, and all other associations. With that in mind, review the following checklist:

- Do you believe that your brand is unique?  
Y  N
- Have you defined the messages your brand must communicate?  
Y  N
- Do you own your brand (unique name, trademarks, etc.)?  
Y  N
- Does your brand link to your company's business plan, vision and culture?  
Y  N
- Does your brand communicate a promise to your customers?  
Y  N
- Is your brand visually distinguished from competitors?  
Y  N
- Is your brand identity consistently reflected in its visual appearance?  
Y  N
- Does your brand communicate what your product and service provides?  
Y  N
- Does your company history add value and credibility to your brand?  
Y  N
- Have you measured the effectiveness of your brand?  
Y  N

The more times you answered “yes” to each of these questions, the healthier your brand.

# Branding and Marketing Plan

## – Branding Consistency Checklist

Consider your product’s packaging, and all other visual elements that support your business, including all written words, regardless of where they may appear.

Are the following elements consistent in appearance and message, regardless of where they appear? Do they consistently contribute to the “sum total” of elements that define your brand?

### 1. Visual Elements

- a. Company name / Wordmark    Y     N
- b. Product name    Y     N
- c. Logo    Y     N
- d. Fonts    Y     N
- e. Consistent colour schemes    Y     N
- f. Regularly-used photographs    Y     N

### 2. Written Words

- a. Basic company information    Y     N
- b. Slogan / Tagline    Y     N
- c. Key brand messages    Y     N
- d. Advertising copy    Y     N
- e. Mission & Vision Statement    Y     N
- f. Positioning Statement    Y     N

### 3. Physical Marketing Assets

- a. Product packaging    Y     N
- b. Invoices    Y     N
- c. Website    Y     N
- d. Letterhead    Y     N
- e. Business cards    Y     N
- f. Vehicle signage    Y     N

If you answered “no” to any of these, you have a challenge with your brand consistency. It’s commonly acknowledged that people remember something better when they have seen it repeatedly, and the most successful campaigns are repeated until the brand is burned into your brain – because they do so with consistent repetition.

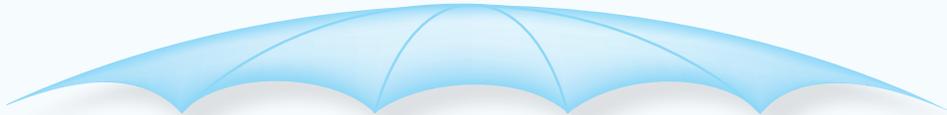
# Branding and Marketing Plan – Tactical Mix

**Q1.** What is your current tactical mix? List all the tactics that you currently employ under the relevant umbrella headings.



Personal Selling	Packaging	Public Relations	Promotion	Internet Marketing	Advertising
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
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.....	.....	.....	.....	.....	.....

**Q2.** See the Tactical Checklist pull-out on the next page to discover which tools you can add to your promotional mix, depending on your market channel. Using the umbrella below, identify what tactics that you plan to employ in the future.



Personal Selling	Packaging	Public Relations	Promotion	Internet Marketing	Advertising
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
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