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**Marketing Plan**

**Template**

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# Template Guide

***What is a Marketing Plan?***

*The* [*Marketing Plan*](https://www.projectmanager.com/project-planning-software.php) *is the central document by which the marketing campaign is formally managed. A Marketing Plan is a document which lists the activities, tasks and resources required to execute the marketing push and realise the business benefits outlined by the client. A typical Marketing Plan includes:*

* *Business information*
* *Marketing goals*
* *Competitive analysis*
* *SWOT (strengths, weaknesses, opportunities and threats) analysis*
* *Target market*
* *Buyer’s cycle*
* *Unique selling proposition*
* *Brand*
* *Website*
* *Marketing channels*
* *SEO*
* *Measurements and KPIs*
* *Marketing strategy and tactics*
* *A schedule of the activities, tasks, durations, dependencies, resources and timeframes*
* *A listing of the assumptions and constraints identified during the planning process.*

***When to use a Marketing Plan***

*Although a summarised Marketing Plan is identified early in process, the details aren’t filled in until the scope has been formally defined and the team appointed. The Marketing Plan is completed early in the Planning Phase. The Marketing Plan is referenced constantly throughout the campaign. As the campaign is undertaken, the Manager tracks the percentage of task completion and the task completion date (actual vs planned) to assess overall performance. These statistics are communicated to the Sponsor/Client within a regular Status Report.*

***How to use this template***

*This document provides a guide on the topics usually included in a Marketing Plan. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables have been added (where suitable) to provide further guidance on how to complete each relevant section.*

# 

# Planning Basis

## Business Information

Write the strategy that the company will use to market its product. This is a high-level statement. The details will be listed in the following steps.

## Marketing Goals

Marketing goals are the specific objectives in your marketing plan, including tasks, quotas, improvements in KPIs, etc. Some examples are listed below.

* Client approval of marketing plan
* Execution of marketing plan
* Approval of marketing materials
* Distribution of marketing materials

List and describe the marketing goals within the following table:

|  |  |  |
| --- | --- | --- |
| **Goals** | **Description** | **Target Date** |
| Client approval of marketing plan | The marketing plan has been documented and was approved by the client. | xx/yy/zz |
|  |  |  |
|  |  |  |

## Competitive Analysis & SWOT

List the strengths and weaknesses of the competitors who are currently in the market and those who potentially could become competitors. This helps you identify opportunities and threats when marketing your product or service. Use the SWOT (strengths, weaknesses, opportunities, threats) analysis table below for each competitor.

|  |  |  |  |
| --- | --- | --- | --- |
| **Strength** | **Weakness** | **Opportunity ©** | **Threat** |
| Large market penetration | Product could be better | Develop product that better meets customer needs | Cost of penetrating market |
|  |  |  |  |
|  |  |  |  |

## Target Market

The target market is the customer base you’re directing your marketing to. You should look at your current customer base, look at your competitor’s customer base, analyze your product or service, define the best demographic for your product or service, etc.

## Buyer Cycle

The buyer cycle is the process that a customer goes through when they’re purchasing a product or service. It is usually defined by five major stages: awareness, consideration, intent, purchase, repurchase.

## Unique Selling Proposition

The unique selling proposition is how your product or service is better than what else is available on the market. It’s a way to differentiate yourself from the competition. Come up with one that is assertive but defensible, and focus on the value it provides your customers. It’s more than just a pithy slogan.

## Marketing Strategy and Tactics

The marketing strategy is your high-level plan, while the tactics are the actions you’re going to take to implement it.

# Marketing Plan

## Brand Strategy

Define your brand as it stands in the market. Determine how you’ll convey it in your marketing materials, and how it will be used to promote the product or service you’re marketing.

## Website

Determine how your website will help market your product or service, whether that’s using the site you have or developing a new one.

## Marketing Channels

Explore the various channels or routes that are best for reaching the customer. Find the ideal way to expose your product or service to the target audience.

## SEO

SEO (search engine optimization) is how you can create marketing materials that will show up high in an online search using targeted keywords.

## Measurements and KPIs

Develop metrics to measure the success of your marketing plan when it is being executed. Some of these KPIs (key performance indicators) including the following:

* Sales revenue
* Cost associated per lead acquisitions
* Customer lifetime value
* Online marketing ROI
* Site traffic
* Conversion rates

## Schedule

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Provide a summarised schedule for each of the actions within the campaign. The best way to create your schedule, link dependencies and set milestones is with project management software.

ProjectManager has an interactive Gantt chart that can upload a task list in a spreadsheet, or you can use one of the many industry-specific templates to get started. ProjectManager’s Gantt goes further to save your plan, so you can monitor your actual progress to make sure you’re staying on track—all done in real time. You can even track multiple campaigns on the roadmap feature.

## Assumptions & Constraints

List any planning assumptions made. For example:

It is assumed that:

* The campaign will not change in scope
* The resources identified will be available upon request
* Approved funding will be available upon request.

List any planning constraints identified. For example:

* The campaign must operate within the funding and resource allocations approved
* The campaign team must deliver the software with no requirement for additional hardware
* Staff must complete the campaign within normal working hours.

# 

# Appendix

Attach any documentation you believe is relevant to the marketing plan. For example:

* Detailed Schedule (listing all phases, activities and tasks)
* Other documentation
* Other relevant information or correspondence.

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