Marketing Plan Outline

- Cover page
- Table of Contents (if 10 pages or longer)
- Executive Summary (if 10 pages or longer)
- Introduction or Overview (if no Executive Summary)
- Market analysis (if business straddles more than one market, may need to analyze several)
  - Which market or industry category is relevant?
  - Industry/category size (nationally, statewide, or locally, whichever is most relevant for the business)
  - Industry trends and outlook
  - Typical sales and distribution channels
  - Price sensitivity
  - Market forecast – Is it likely to grow, shrink, or stay the same?
  - Demographic changes (if relevant)
  - Changes in consumer habits and preferences
  - Potential impact of technology
- Target Customers (If more than type of target market, describe for each market segment)
  - Ideal client/customer
  - Location
  - Problems/Needs/Desires
  - Demographics – Age, gender, income level, education level
  - Psychographics – Attitudes, values, beliefs, lifestyle preferences
  - Size and growth potential
  - Purchase potential
- Company/Product Analysis
  - Strengths, Weaknesses, Opportunities, Threats (SWOT Analysis)
  - 4 Ps Analysis
    - Product
    - Price
    - Placement (Distribution)
    - Promotion
    - 5th P (if relevant) - People
  - Peers/Competitors
    - Similarities and differences
    - Strengths and weaknesses
  - Branding and Positioning
    - Value proposition
• Marketing Goals for 1, 1-3, or 1-5 Years
  o Make them Specific, Measurable, Achievable, Relevant, Time-Bound (SMART)
  o Include sales goals if relevant

• Marketing Strategies and Tactics (Which strategies and tactics are most likely to enable the business to achieve its marketing goals in the desired time period?)
  o Digital and social media
  o Direct sales (stores, farm stands, kiosks, farmers markets, PYO)
  o eCommerce
  o Outreach
  o Events
  o Advertising (off and online)
  o Public relations
  o Partnerships and cross-marketing
  o Promotions
  o Demos/free trials/sampling
  o Print/sales collateral
  o Grassroots/guerilla marketing

• Marketing Plan/Calendar
  o What is the recommended marketing mix of strategies and tactics?
  o What specific activities must take place on a daily, weekly, monthly, quarterly and annual basis for the business to achieve its goals?

• Marketing Metrics
  o How will the business know if its marketing plan is working? How do they define and measure success?
  o What specific indicators will be tracked? Over what period of time?
  o How will they be measured and recorded?
  o How often will progress be reviewed? How will the plan be adjusted?

• Marketing Budget
  o What are the projected costs (time, money, and other resources) of the recommended activities in the plan?