



<http://www.WebSiteMarketingPlan.com>

## Marketing Plan Workbook

**This is an instructional, step-by-step workbook based on a simple 5-step marketing plan process, explained by Bobette Kyle here:**

[http://www.websitemarketingplan.com/marketing\\_management/5Steps.htm](http://www.websitemarketingplan.com/marketing_management/5Steps.htm)

(Copy and paste URL or visit [WebSiteMarketingPlan.com](http://www.WebSiteMarketingPlan.com) and click on "Marketing Plan Outline" in the left navigation.)

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## Completing this Workbook

Think of the marketing plan process as a funnel or inverted pyramid. In the beginning, you have general information and vague notions. Working through the process helps you get more specific so that when you are finished you have developed explicit goals and marketing programs. As you complete this workbook, record your objectives, strategies and tactics on a summary sheet. We recommend you also write a more extensive document explaining the rationale behind your plan and detailing success measures.

### Step 1: Gather and analyze information

In Step 1, collect and organize information about your industry and company. By collecting the following information and supporting documents you will be well on your way to a strong marketing plan. This information will help you understand your industry and your company's place within it.

As you gather information, organize the data. Physically copy and file short documents, note where you can go to read longer documents, and fill in URLs to other information as you find them.

#### Existing Company Information

- Current company goals.
- Other business strategies.
- Target customers for each product/service.
- General approach when pricing.
- Profitable products and/or services.
- Unprofitable products and/or services.
- Business strengths.
- Business weaknesses.

#### Information About the Outside Business Environment

- Five competitors similar in size and products/services offered (and their Websites).
- Five largest public companies in the industry, along with their Web sites.
- More information about the industry and competitors (books, annual reports, white papers, articles, newsletters, trade associations, etc).

### Step 2: Verbalize your main challenge(s)

After completing Step 1, one or two broad business issues or challenges have likely come to mind. Think about how you want to solve or address these issues in your marketing plan. When completed, your marketing plan will answer the question "How do I address these challenges?" If you are developing a company-wide marketing plan, you may want to identify a main challenge for each service or product line.

Write down the biggest issues and challenges you want to focus on in your marketing plan.

### **Step 3: Develop your objective(s)**

Your objective will be a natural extension of the main challenges you identified and your company's overall business objectives. Think of your objective as a one-sentence "big picture" answer to your main challenges.

If needed, review the information you gathered in Step 1. Consider industry trends; trends related to your target customers; strengths/weaknesses; opportunities/threats; revenue and cost-saving considerations; and long-term as well as short-term effects on business.

Write down your objective(s), making each quantifiable (measurable) and specific. If you are developing a marketing plan for several services or product lines, write objectives for each.

### **Step 4: Create strategies**

Once you have solidified your goal(s), you will identify strategies to support. These broad strategies will drive your choice of tactics / marketing programs. Your strategies define the general approaches you will take to meet each objective.

Example: If a product line objective is to increase profit by 15%, one strategy may be to sell that product line from your Website. Another strategy may be to focus on increasing sales of the most profitable item in the line.

When developing strategies, remember to take into account industry trends and opportunities from Step 1 as well as your strengths and weaknesses.

Write down up to four strategies for each objective and explain how each will help meet the objective.

### **Step 5: Choose tactics/marketing programs**

Finally, you will choose tactics (i.e. marketing programs). Once implemented, the tactics should lead to accomplishing your strategies. Remember to include all aspects of the marketing mix in your marketing programs. Consider all the "P's" (product, price, place/distribution methods, promotion, people and process as well as the customer-oriented "C's" (convenience, cost to the user, communication and customer needs and wants).

Example: If one strategy is to sell a product line from your Website, a supporting program may be to convert certain printed items to digital format and sell them as downloads. Another program may be "Internet Only" offers, available only by visiting the site.

When developing a "laundry list" of potential tactics/programs, a brainstorming session works well. When narrowing the list down, think about cost, ease of implementation, and potential success.

For each strategy, write down a brainstormed list of programs/tactics that support the strategy. Then, narrow the list to the few with the most potential for each strategy. Write the edited list on your marketing plan summary page.

## Develop Preliminary Budgets and Implementation Dates

Budgeting details and project timelines are beyond the scope of this workbook. Both are, however, an important element in program implementation.

By each tactic, write a preliminary budget and target completion date. You will probably want to include details and timelines in your marketing plan write-up.

## Presenting Your Plan. The Write-Up

Marketing plan write-ups can range from a few pages to several hundred, depending on detail and company size. If you are a very small company or solo entrepreneur, for example, a one-page marketing plan summary (along with notes) may be all the documentation you need to begin implementing.

Each company is different. Largely, your situation will dictate the write-up. For ideas about what to include in your write-up, read "What To Include When Writing a Marketing Plan" here:

<http://www.websitemarketingplan.com/mplan/MarketingPlanIncludes.htm>

(Publisher's Note: Other articles in the same "Marketing Plan" section of WebSiteMarketingPlan.com explain alternate methods of writing or creating a marketing plan.)