

[Note: Aside from the Executive Summary -- which always appears first and summarizes your plan -- the order you present information in the marketing plan is flexible. You may present the goals, products, and strategies sections first, then analyses, financials, etc. sections as supporting documentation. Or (as shown here) present analyses first, as a lead-in to goals and strategies.]

Cover Sheet [Fill in name, address, phone, marketing team members (title, address, phone), date marketing plan prepared, who prepared, version/copy number (if more than one).]

Part 1: Executive Summary

Answer “who,” “what,” “when,” “where,” and “how” with respect to marketing objectives and strategies; forecasts; marketing and product finances; etc. The Executive Summary should be done last, after all marketing plan analysis and details have been completed.

Part 2: Industry Analyses

This is an overview of the industry and key insights into competitors, suppliers, the regulatory environment, customers and the company's place within the industry.

SWOT Analysis: Detail the strengths, weaknesses, opportunities and threats in industry. For more on completing a basic or expanded SWOT analysis, see:

http://www.websitemarketingplan.com/marketing_management/SWOT.htm

(When typing the URL into a browser, note there is an underscore (“_”) between “marketing” and “management,” and SWOT is in all caps.)

Porter's 5 Forces analysis: Analyze the dynamics between and activities of current and future competitors; your own company; substitutes for the products your company markets; the industry suppliers; and customers. Do not forget to factor in regulatory issues. For more about Porter's 5 Forces, read:

http://www.websitemarketingplan.com/marketing_management/marketing_strategy.htm

(When typing the URL into a browser, note there are underscores (“_”) between “marketing” and “management” as well as between “marketing” and “strategy.” Also, all letters are lower case.)

Part 3: Products and Corresponding Target Markets

Here, describe your products and your target customers for each. For each product or brand, include:

- **Target market demographics** such as income levels; interests; activities; living environments; other geographic descriptions; psychological mindsets; political affiliations; family situations; age ranges; tastes; etc.
- **Industry or societal trends** that affect your customers.
- **Your target customers' needs and wants**, and corresponding benefits received from products.

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Part 4: Marketing Strategy

Include overall marketing objectives and mission statement in this section, and for each product address:

- **The product's positioning** relative to competitors and in the eyes of target customers.
- **The general strategies** you will use to reach objectives and fulfill the mission statement.
- **The product's marketing mix**, including specific marketing programs. Address all of the "four P's":
 - **The products themselves** and any related changes, improvements, and issues.
 - **Pricing strategies** for each product. For a summary of various pricing strategies, go to: <http://www.websitemarketingplan.com/techniques/pricing2.htm>
(When typing the URL into a browser, note that all letters are lower case.)
 - **Distribution channels** (the various ways each product reaches customers and consumers).
 - **Promotional activities**, including public relations, Internet marketing and advertising, offline advertising, viral programs and other marketing programs you will be executing.

Part 5: Measurements

Build success metrics into each marketing program, including intermediate measures, and how you will use them to monitor progress and adjust execution when applicable.

Part 6: Forecasts and Financial Analyses

Explain the size of your target markets, market shares and growth projections by month. Also include financial analyses:

- **Pro-forma profit and loss statements** (P&L's), which detail:
 - sales units and dollar forecasts
 - cost of goods
 - marketing budgets
 - fixed overhead and variable expense projections
 - other expenses
 - profit margins
- **Breakeven analysis**, showing units and dollars needed to make a profit for each marketing program (or new or changed product).
- **"What-if" scenarios** (sensitivity analyses) showing what happens if forecasts and profit margins are lower or higher than expected.

To read more marketing plan information, and details about writing the plan from an outline, go to:

- <http://www.WebsiteMarketingPlan.com/mplan/software> (software, \$179.95)
- <http://www.WebsiteMarketingPlan.com/mplan/marketing-strategies.htm>
(free online articles about marketing planning)

(When typing the URL into a browser, note that all letters in "mplan" and "software" are lower case.)

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