

Note: Aside from the Executive Summary--which appears first and summarizes your plan--you can rearrange the order you present information in your marketing plan.

## **Cover Sheet**

Includes the name, address, phone, marketing team members (title, address, phone), date marketing plan was prepared, who prepared it, and 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. This section should be completed last, after all marketing plan analysis and details have been written.

## **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 your industry.

For more on completing a basic or expanded SWOT analysis, see:

<http://www.WebsiteMarketingPlan.com/swot>

**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/porter>

## **Part 3: Products and Corresponding Ideal Customers**

Here, describe your products and the ideal customers for each. If you are a service-based company, think of your clients as the ideal customers and your services as products. For each product or brand, include:

- **Ideal customer 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 those customers.
- **Your ideal customers' needs and wants**, and corresponding benefits received from products.

## **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 ideal 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/pricing>
  - **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 ideal customer group, 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; and profit margins. Download a P&L form here: <http://www.websitemarketingplan.com/PL>
- **Breakeven analysis**, showing units and dollars needed to make a profit for each marketing program (or new or changed product). Read more about breakeven analysis here: <http://www.websitemarketingplan.com/breakeven>
- **"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/software> (**15% off marketing plan software**)
- <http://www.WebsiteMarketingPlan.com/marketing> (more free online articles about marketing planning)