Marketing plan template

A marketing plan is a roadmap that outlines your marketing strategy and tactics to achieve your goals. Reasons to create a marketing plan include helping you set clear objectives, define your target market, identify customer needs and build out tactics to increase sales.

Another benefit is prioritizing activities and allocating resources, including time, money, and staff to identify the most effective marketing channels and activities that generate the highest return on investment.

Overall, a marketing plan helps determine the metrics to measure the effectiveness of marketing activities and choose the most appropriate based on resources and market conditions.

Sample marketing plan questions:

- **The problem you solve.** Describe the customer pain points you solve with your product or service.
- **The target market you sell to.** If there's more than one target market, list them all. Be as specific as you can.
- **If you've created a customer profile, outline the details.** Have you thought about creating one of more customer profiles of the specific type of people you plan to target?
- **The channels you use to distribute to your customers.** What methods will you employ to sell your goods or services? Make a note of each here. For example, you might sell online, through third-party websites, direct via a retail outlet etc.
- **Build credibility.** Describe steps to improve your credibility (industry knowledge and experience, speaking at industry events, generated positive stories, proven track record.
- **Partnering and collaboration.** Identify two or three possible marketing partners who sell to the customers you want to reach. Discuss how you'd plan a joint marketing initiative.

1. Strategic overview

The problem you solve

{Enter text –describe the customer pain points you solve with your product or service.}

The target market you sell to

{Enter text – if there's more than one target market, list them all. Be as specific as you can.}

If you've created a customer profile, outline the details below

{Enter text – have you thought about creating one of more customer profiles of the specific type of people you plan to target? If so, discuss this here.}

The channels you use to distribute to your customers

{Enter text – what methods will you employ to sell your goods or services? Make a note of each here. For example, you might sell online, through third-party websites, direct via a retail outlet etc.}

Building credibility

{Enter text – describe steps to improve your credibility (industry knowledge and experience, speak industry events, generated positive stories, proven track record.}

Partnering and collaboration

{Enter text – identify two or three possible marketing partners who sell to the customers you want to reach. Discuss how you'd plan a joint marketing initiative.}

2. Digital plan

Website optimization

{Enter text – outline how your website attracts online traffic. Using search keywords, providing online content, linking to reference sites etc.}

Creating online leads

{Enter text – describe what are you doing to encourage the collection of prospect contact details.}

Content marketing

{Enter text – outline how you use content marketing to build interest in your business and to demonstrate credibility and industry knowledge.}

Marketing automation

{Enter text – identify the marketing software you use to track leads and keep in contact with customers automatically.}

Search engine optimization

{Enter text – document the tactics you use to get to the top of search.}

Online advertising

{Enter text – outline your advertising strategy and list which online platforms you advertise in e.g., Google Ads, Facebook, Twitter, LinkedIn, You Tube etc.}

3. Pricing

The price you sell for each of your products or services

{Enter text – list the prices or ranges of prices you plan on charging customers.}

Compare your price with competitors

{Enter text – do some research on your competitors and detail their main competing goods or services here, along with the prices they're charging.}

Justify why you've priced the way you have (high, medium, low)

{Enter text – if your business has different prices than your competitors, explain why.}

4. Market research

Direct market research

{Enter text – which methods of market research have you used? How will you continue using market research as you progress?}

Customer insights

{Enter text – detail the key findings you've discovered about the potential customers in your target market. How will these findings help your business establish a foothold in the marketplace?}

Competitors insights

{Enter text – note down any important information you've found out about your competitors through market research.}

Future trends

{Enter text – outline how your industry is changed, the trends and how your business must change to take advantage of, or offset, these trends.}

5. SWOT

Fill out the SWOT analysis below by listing your business's strengths, weaknesses, opportunities and threats in the left column. Detail how you could lower or increase their impacts in the right.

Strengths	**How we take advantage:**
Weaknesses	**How we reduce the impact:**
Opportunities	**How we take advantage:**
Threats	**How we reduce the impact:**

What's your chosen SWOT strategy?

{Enter text – choose a strategic direction for your business. For example, exploit your internal strengths to maximize your external opportunities.}

6. Competitor analysis

Your main compatitor

Strengths **Weaknesses**

How will you combat their strengths and target their weaknesses?

Other key compatitor

Strengths **Weaknesses**

How will you combat their strengths and target their weaknesses?

7. Competitive advantage

Competitive advantage

{Enter text – explain what makes your business different. What are your key points of difference? Do you have a clear understanding of why customers will buy from you?}

Communicating competitive advantage

{Enter text – describe how you'll help customers understand why you're different.}

Defending competitive advantage

{Enter text – describe any barriers to protect your competitive advantage from others.}

Intellectual property or assets

{Enter text – list any intellectual property that helps to create competitive advantage - for example, a patent.}

8. Social media

Online/social media

Blog

Facebook

Instagram

LinkedIn

Pinterest

Threads

TikToK

Tumblr

Website

X

YouTube

Other

Which social media platforms will your business utilize and why?

{Enter text – discuss which platforms you've chosen and why they will be the most useful for your business. If you plan to create a blog or run a website, include these details too.}

9. New customer acquisition plan

Your ideal prospect

{Enter text – describe your ultimate customer in as much detail as you can.}

Prospects pain point

{Enter text –outline the main problem and how you solve this pain point}

Customer search behavior

{Enter text –outline how this customer may find you. The ways they search for information.}

Leads into customers

{Enter text - specifically how you will turn leads into loyal customers.}

10. Advertising

Advertising message

{Enter text – how will you show the benefits of your products or services while suggesting a 'need' or a 'problem' that your business can solve for consumers. Do you have a tagline or slogan?}

Advertising tactics

{Enter text – which advertising methods you will use to grab the attention of potential customers? Outline exactly how you plan to get your message across and the budget you have for each method.}

What are the features, advantages and benefits of your products and services?

{Enter text – discuss these in relation to how you'll advertise your goods or services.}

11. Other marketing information

{Enter text – outline anything else you feel is important to add to your marketing plan.}

{Enter text – outline anything else you feel is important to add to your marketing plan.}

{Enter text – outline anything else you feel is important to add to your marketing plan.}

{Enter text – outline anything else you feel is important to add to your marketing plan.}

Help

Marketing plan explanations and guidance

Strategic overview

Write information about how your product or service addresses customer pain points. Include specific information about your target market, your customer profiles and the channels you use to distribute to your customers. Think about the clients you enjoy working with and what attributes they have.

Describe your business as though you're telling a stranger what you do.

Customer profile

Build a customer profile. It should state who your target customers are, what their pain points are, their location, demographic, pain points and location. Be specific. Rather than stating 'people who eat at restaurants' outline the most likely customers. For example, 'couples aged 20–30, with professional jobs and no dependents who live within a twenty–minute drive or walk.'

Channels you use to distribute to customers

This refers to how your customers access your goods and services. This could be online from your own website, as in people buy your products online through your website. Or they may buy online from a third–party platform.

Building credibility

Make a list of the steps you've taken to highlight your credibility in the industry. This might include releasing thought leadership articles, writing an ebook or white paper, or giving presentations and webinars about specialized topics. You may have also had positive news coverage in the media or gathered case studies and testimonials about your work.

Partnering and collaboration

Identify possible partners who sell to the customers you want to reach. Ideally these are complementary businesses who sell goods or services that relate to yours but are not a direct competitor. Explore how you could collaborate on marketing to broaden each other's reach. This might include supporting each other on social media, running co–sponsored events, or publishing each other's blog posts.

Digital plan

Your digital plan revolves around how you'll reach potential customers online by attracting website traffic. This includes website optimization, search engine optimization, and content marketing.

Website optimization

Talk about how your website attracts viewers. You'll likely use specific search keywords, post regular and engaging blog content, and link to reference sites.

Content marketing

Content marketing is used to position yourself as a credible resource in your industry and build interest in your business. You can publish white papers and ebooks, thoughtful blog posts and articles, and host presentations on topics related to your industry.

Marketing automation

Marketing software helps you track leads and stay in contact with customers. For example, you can create automated email sequences that highlight the benefits of your goods and services to clients. Emails can be personalized based on the customer's interactions with your business.

Pricing

Your pricing plays a key role in how you set your business apart from the competition, and how you market yourself. You'll need to be able to place your pricing within the context of the broader industry and justify why you've landed on that pricing strategy.

Compare your price with competitors

Research your competitors and find out what their charging. Remember that their goods or services might be different from yours. If they are, make note of it. That might explain some differences in pricing.

Justify why you've priced the way you have (high, medium, low)

If your pricing is significantly different from your competitors, explain why. Are you selling a significantly higher quality product or service? Do clients get more value with you? Have you been able to produce the product or service at a substantially reduced cost?

Market research

Market research tells you a lot about the people who want to buy from you, what they need, and what they value. You'll want to conduct market research to better understand your place in the market. Talk to your customers and clients and examine what your competitors are doing to learn more about your industry. Remember to explore predicted trends as well. Note how your industry has changed and what you can do to adjust to market trends.

Direct market research

Outline the results of any market research (surveys, focus groups and online research) where you've spoken directly to a customer or prospect. What insights have you learned? How are you applying your insights?

SWOT (Strengths, Weaknesses, Opportunities, Threats)

Fill out the chart by noting your strengths, weaknesses, opportunities, and threats. Explore them further by noting how you will either maximize them (strengths/opportunities) or minimize them (weaknesses/threats).

When filling the chart out, pay attention to what's working well for your business and where you have challenges.

Outline a strategic direction for your business.

Competitor analysis

Get to know your competitors and their strengths and weaknesses to better position your business. Find businesses that are closest to yours in terms of goods or services, pain points solved, and target audience. Then outline how you'll combat their strengths and take advantage of their weaknesses.

To build an advantage over competitors, you simply may need to increase your profile or adjust your pricing.

Competitive advantage

Your 'unfair advantage' over your competition is what sets you apart and forms your competitive advantage. Are you faster, cheaper, more experienced, or better qualified than the competition? Do you have a wider product range or more specialized services? Your competitive advantage should be something that makes you stand out from the crowd, exploits a gap in the market that your competitors haven't thought about, and is important to your target audience.

Defending competitive advantage

Competitors could figure out your competitive advantage and take steps to mirror it. Describe how you'll defend it. For example, if your advantage is your highly skilled employees, you could have them sign non-compete clauses or confidentiality agreements. You may lock up a key supplier with an exclusive contract.

Intellectual property or assets

Intellectual property includes patents, trademarks, or other forms of legal protection over your creations or inventions of the mind. It is designed to protect your intellectual and creative efforts. Intellectual assets are assets that are valuable to you but cannot be legally protected. This includes your relationships with customers, the goodwill you've built, or special business processes.

Social media

It's very likely your audience is somewhere on social media. When you market your business, you'll want to be on the social media platforms they're on. Research to determine what platform your audience is most likely to be on and set up a profile there. Develop a plan for using social media, such as how often you'll post, what types of posts you'll publish, and who will be responsible for the account.

New customer acquisition plan

It's important to bring in new customers to grow your business. Review your past six months and identify the marketing strategies that most successfully brought in new customers. Consider reusing those tactics.

Prospect pain points

After identifying your ideal customer, discuss their main pain points and how you solve those pain points.

Leads into customers

There might be a gap between when people learn about your business (become leads) and when they buy from you. How will you encourage them to move from leads into customers? For example, will you use an email marketing campaign to move them along the marketing journey? Will you offer discounts for first time buyers? Will you offer ebooks about your area of specialty?

Advertising

Advertising your goods and services will help you find new leads and customers. Your advertising should highlight your customer pain points, your unique competitive advantage, and the benefits of your products and services. Lay out what advertising methods you'll use to attract your audience. Finally, talk about how you'll convey your features, advantages, and benefits in your advertising.

Other marketing information

Include additional information here, such as whether you'll add in other marketing tactics. These might include having a referral program or hosting special events.