

FORMAT FOR A MARKETING PLAN

- I. Executive summary (*summarizes the plan's highlights and objectives*)
- II. Current marketing situation (*analyzes the current situation of the company, product, market, environment, and competition*)
 - A. Market overview
 - i. Market demographics and needs
 - ii. Market trends and target market growth
 - B. SWOT analysis
 - i. Strengths
 - ii. Weaknesses
 - iii. Opportunities
 - iv. Threats
 - C. Competitive and industry analysis
 - D. Product overview
 - E. Keys to success and critical issues
- III. Environmental analysis (*examines environmental factors affecting the company, its products, and its marketing*)
 - A. Macroenvironmental factors (*how demographics, economic climate, technology, legal and regulatory issues may affect the marketing plan*)
 - B. Microenvironmental factors (*how suppliers, channel members, competitors, and customers may affect the marketing plan*)
 - C. Competitive strategy (*how the firm will compete*)
- IV. Marketing Strategy (*discusses overall strategy and objectives*)
 - A. Mission
 - B. Marketing objectives
 - C. Financial objectives
 - D. Target market(s)
 - E. Positioning
 - F. Strategy summary
- V. Marketing Mix (*describes major elements with specific activities, schedules, and responsibilities for each program*)
 - A. Product
 - B. Pricing
 - C. Promotion
 - D. Channel
 - E. Service
 - F. Internal marketing
- VI. Marketing research (*research conducted and needed to support the marketing plan*)
- VII. Financials (*includes budget details of expected revenue, expenses, and profits from marketing programs—by month, by product, by territory, by manager, etc.*)
 - A. Sales/revenue forecast(s)
 - B. Marketing expense budget(s)
 - C. Break-even analysis
 - D. Profit and loss analysis
- VIII. Controls (*shows how plan will be put into action, performance measured, and adjustments made when necessary*)
 - A. Implementation
 - B. Marketing organization
 - C. Contingency planning