Marketing Plan Template\*

Instructions

Thank you for downloading this marketing plan template. Please feel free to delete this page after you have read the instructions below.

1. Detailed guidance on completing the various sections of this marketing plan template can be found at the end of this document. You may wish to delete these when you have finished your business plan or keep them in for future reference.
2. This document is a guide only – you may wish to delete or add sections to this plan depending on your business type or the intended audience of your business plan.

## Important Disclosures

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Marketing plan for

[Enter your business name here]

Date:

One. Introduction

[The structure of this document is a guide only – you may wish to delete (or add) sections depending on your business type or the intended audience of your marketing plan. If you need more space, just keep typing. This is a Word document on purpose, as it’s the easiest to edit and add content to. Once finished, format to match your own brand, then save as a PDF. Delete all of the explanatory text and instructions as you go, which have [ and ] surrounding the text, such as this heading and paragraph. Add any images, diagrams, links to websites or descriptions that make it easier to explain what you are doing.]

### BUSINESS SUMMARY

[Enter text - sketch out your overall business idea to give you and any reader an immediate understanding for what your business does, and why it will succeed.]

#### Marketing objective

[Enter text – outline exactly what you’re hoping to achieve with your marketing plan. If you can be exact, such as ‘increase sales 50%’, or ‘gain 10 new clients’.]

### BUSINESS MODEL

[Enter text - describe the distribution model you’ve chosen, including your reasons for choosing it. This is the way your business earns money –how you’re getting paid]

#### Target customers

[Enter text - outline your top customer targets in as much detail as you can. You may want to describe them in detail (demographic, where they live, their motivations). In effect a ‘persona’ to understand their needs. If you are targeting other businesses, describe the type of business. Try to focus on just the top 3-5 customers.]

#### Key competitors

[Enter text - you’ll be able to better assess who you’re up against and develop effective action items to gain customers by knowing as much about your key competitors as possible. Outline your key competitors. Outline how you intend to differentiate from them.]

### DIRECT MARKET RESEARCH

[Enter text – outline what you’ve found from talking to potential or existing customers. What insights have you learnt, and what motivates them to buy from you?]

### IN-DIRECT MARKET RESEARCH

[Enter text – outline what you’ve found from desk research such as searching online, reviewing relevant statistics, looking at industry trends. Build a picture of your industry.]

#### Industry characteristics

[Enter text – outline the nature of the industry you are in, and anything specific that sets your business apart from others. For example the retail industry relies on location, suppliers of product and increasingly, online behavior.]

#### Price strategy

[Enter text - outline your pricing strategy and why you’ve decided to be lower, the same or higher than the competition.]

#### Other introduction aspects that are important

[Enter text - outline what else you want to include in this section, in case we haven’t covered a particular topic that is important to your business.]

#### Social conscience

[Enter text – describe what you’re doing to help the local community or making the world a better place.]

Two. The Market

### MARKET SIZE

[Enter text - describe the demand for your product or service, including the size of the market you’re entering into. Include any statistics you’ve discovered, such as where the greatest concentrations of your ideal customer are located. How many people will be interested, at the price you’re charging? How many of your target customers are in your market?]

### WHY CUSTOMERS WILL BUY

[Enter text- describe why you think potential customers will buy off you, rather than the current competition. If there is no competition, explain why.]

#### Customer buying behavior

[Enter text - describe what you’ve learned about your customers’ buying behavior. Knowing when and how often your repeat customers will likely purchase from you can be crucial information for estimating your business’s cash flow. Especially identify buying cycles and budgets.]

#### Strengths, weaknesses, opportunities and threats ANALYSIS

[Enter text - complete this grid to review the over all aspects of your business.]

|  |  |
| --- | --- |
| **Strengths and how to maximize them**[Enter text] | **Weaknesses and how to reduce them**[Enter text] |
| **Opportunities and how to make the most of them**[Enter text] | **Threats and how to reduce them**[Enter text] |

### COMPETITOR SWOT ANALYSIS

[List your main competitors and how you will act.]

|  |  |
| --- | --- |
| **Competitors’ strengths and how to better them**[Enter text] | **Competitors’ weaknesses and how to exploit them**[Enter text] |
| **Opportunities your competitors may have, and how to reduce the impact**[Enter text] | **Existing threats to your competitors, and how to take advantage of them**[Enter text] |

#### Other market aspects that are important

[Enter text - outline what else you want to include in this section, in case we haven’t covered a particular topic that is important to your business.]

Three. Finding new customers

#### Convincing customers to switch to you

[Enter text – new customers tend to have an existing provider. Describe the methods you plan to use to convince people to switch to you. If you can cover out-bound tactics (where you approach customers directly), and in-bound tactics (where customers find you and approach you.]

#### Social media

[Enter text - outline your social media campaign. Though it’s not compulsory for every business to have social media, chances are your customers will have some social media presence. It’s also better to focus on channels that are going to make a marked difference then spread yourself too thin over every platform.]

#### Content marketing

[Enter text - outline how you will use content (blogs, whitepapers, technical downloads, articles, tools and templates) to engage and educate potential new customers.]

#### Credibility

[Enter text - describe what steps you plan to take to improve your credibility. Have you shared your industry knowledge and experience, spoken at industry events or generated positive stories in your local media? Outline what you’ve done to show how you’re always putting the customer first. Have you highlighted your proven track record with active social media updates?]

#### Promotion TARGET 1

[Enter text – from the previous section outline your first target, and then describe the marketing tactics you intend to use to get their attention. What advertising tactics will appeal specifically to your key targets? Think about their particular patterns and create a list of ideas that is likely to get you in front of them. Also describe your plan to move them from a lead, to a qualified prospect, to a customer.]

#### Promotion TARGET 2

[Enter text – repeat for all your key targets, but only include new tactics that relate to this target.]

#### Promotion TARGET 3

[Enter text – repeat for all your key targets, but only include new tactics that relate to this target.]

#### Online lead generation

[Enter text - describe how you’re planning to use your website to encourage customers to contact you, for example content marketing, free downloads, e-newsletter, and content marketing?]

#### Customer relationship management (CRM)

[Enter text - describe how you’re planning to use CRM software to track potential new leads and then convert them to customers]

#### Referrals

[Enter text - how will you encourage referrals? Getting your customers to tell others what they think of you is one of the most effective ways to gain new customers. Providing an excellent customer experience is the most effective way to encourage referrals. People are more likely to return and give you their loyalty if they have a positive experience with your business.]

#### Online assets

[Enter text – list your online presence.]

|  |  |  |  |
| --- | --- | --- | --- |
| Website | {Enter address} | Blog | {Enter address} |
| LinkedIn | {Enter address} | Google+ | {Enter address} |
| Facebook | {Enter address} | YouTube | {Enter address} |
| Instagram | {Enter address} | Tumbler | {Enter address} |
| Twitter | {Enter address} | Pinterest | {Enter address} |
| other | {Enter address} | other | {Enter address} |

#### New customer budget

[Enter text – specify how much you intend to spend on getting new customers and justify the return on investment.]

#### Other new customer aspects that are important

[Enter text - outline what else you want to include in this section, in case we haven’t covered a particular topic that is important to your business.]

Four. Retaining existing customers

[Once you’ve completed your Business Summary, you can add further detail if you wish. It’s not compulsory.]

#### Customer loyalty

[Enter text - describe how you plan to make sure your customers keep coming back, and how you intend to use their loyalty to increase sales. Outline your customer loyalty strategies and provide detail on how you developed them.]

#### Retention TARGET 1

[Enter text – from the previous section outline your first target, and then describe the marketing tactics you intend to use to get them to come back. Describe the technology or resources will you use to track their purchases and incentivize them to return.]

#### Retention TARGET 2

[Enter text – repeat for all your key targets, but only include new tactics that relate to this target.]

#### Retention TARGET 3

[Enter text – repeat for all your key targets, but only include new tactics that relate to this target.]

#### Retention budget

[Enter text – specify how much you intend to spend on retaining customers and justify the return on investment.]

#### Other retention aspects that are important

[Enter text - outline what else you want to include in this section, in case we haven’t covered a particular topic that is important to your business.]

Five. Final thoughts

#### What else is critical to communicate in your marketing plan?

[Enter text - we’ve covered the main elements of a marketing plan, but it’s highly likely there are other topics you need to include. Possibly you’re importing or exporting, so will need to be aware of promoting in a different country. If you are in a unique industry you may need to explain in more detail the characteristics of what works and what doesn’t. Outline anything else in your marketing plan that you think is important to include. If you wish, create new headings and sections.]