

MARKETING STRATEGY PLANNER

Template



1. Executive Summary

Your executive summary provides a recap of your strategic marketing plan that explains your overall marketing goals, current marketing status, action items for achieving your marketing goals, and recommended marketing budget.

2. Current Situation

A current situation assessment helps you see where competitors are and what changes you need to prepare for to succeed.

Market

For example, what is your market, what kind of growth is your industry showing, who is your target audience, and what market trends should your company watch?

Environment

Explain the current environment of your industry. Look at big and small changes, as well as upcoming trends that may influence your business and its target audience. Then, summarize how these changes could shape your company and its marketing efforts.

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Product or service

Provide essential product or service information. You'll want to note sales, gross margin, and customer or product lifecycle.

2. Current Situation

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Competition

Complete an analysis of direct and indirect competitors. Your research should look at the competition's market position, strategy, tactics, sales, pricing, and more.

Channels and logistics

Look at how your business sells and distributes its products, whether through your sales team, client referrals, or ecommerce store.

3. SWOT Analysis

Strengths

What does our company do well? What are our unique selling points (USPs)? What resources do we have available?

Weaknesses

Where could our business improve? What are some USPs of competitors? Why do clients choose a competitor over us?

Opportunities

What market trends could we use to our benefit? Which weaknesses could we fix, and how? Which strengths can we improve?

Threats

What market trends could hurt us? Which competitor's actions could harm us? Which weaknesses pose the most threat?

4. Objectives and Issues

Duration

Outline the period of your marketing strategy. For example, does this document look at your company's marketing plan for the next year, quarter, or month?

Goals

Explain what your company wants to accomplish for the determined duration.

Issues

Note any issues that could influence your ability to complete your marketing goals.

5. Marketing Strategy

Positioning

Explain your company's approach to marketing. How does your organization promote itself and its products or service as the ideal solution?

Value proposition

Break down why people buy your products or services. What motivates consumers or business buyers to go with your company versus a competitor?

5. Marketing Strategy

Strategy

Summarize the short- and long-term plan for your products or services.

Pricing

Outline the pricing model that your business follows. You should also highlight your pricing tier, like whether it's economy or luxury.

Distribution

Review your company's supply chain.

5. Marketing Strategy

Communication

Provide an overview of how your marketing communications will work and which departments will have a role.

Market research

Review any relevant market research findings.

6. Action Programs

Outline the action programs or items for marketing your business online.

If you're looking to launch a revised version of a product, for example, you may suggest the following:

- **SEO**
 - Launch new optimized product page
 - Add new optimized product page to the main navigation, under "Products"
 - Conduct outreach to promote the new product
- **Video marketing**
 - Film a product video for the new optimized product page
 - Upload YouTube videos that show the product's uses and benefits
 - Optimize uploaded YouTube videos for YouTube SEO to increase discoverability
- **Pay-per-click (PPC) advertising**
 - Create a PPC campaign that promotes the new product
 - Develop a PPC campaign that targets competitor brand names
 - Build a remarketing campaign for users that visit the new product page

7. Marketing Budget



Your marketing budget planner should include:

- Anticipated investment for each action item, like SEO
- Expected sales and revenue
- Predicted costs for any marketing tools or services, like freelancers

8. Metrics

Finally, you'll want to outline the metrics you'll use to measure your marketing plan's success. Use your goals, which you shared in step four of your marketing plan outline, to determine which metrics will measure your goal progress the best. A few common digital marketing metrics to track include:

- ROI
- Conversion rate
- Cost per click (CPC)
- Click-through rate (CTR)
- Time on page