

Marketing Plan

For [Year] – [Year]

Project Manager Name

Company





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Mission Statement

Start by creating your marketing team mission statement. This could be similar to the mission statement offered on the blog. Make sure the mission statement aligns with the company's mission statement.

Who is your company?	
What is the purpose of your business?	
What do you offer that your competitors don't?	
What does your company value the most?	
Why was your company founded?	
How do you measure success? (Include business and cultural aspects)	
What defines your company culture?	
What motivates you to work?	

Now take the above answers and fill out the following:

As **<company name>**, we believe **<value>** and **<value>**. Our employees feel **<verb>** to **<task>**, while **<actionable phrase>**. We help customers feel **<emotion>**, and **<verb>** them to **<task>** and **<task>**.

Example: *Our employees feel empowered to take every action needed to support the customer, while reaching their full potential.*



Audience Persona

All marketing activities must align to the wants and needs of your customers. If you have multiple target markets, make copies of this worksheet and fill it out for each audience segment.

Name:	
Age:	
Education:	
Occupation & Job Title:	
Location:	
Income/Budget:	

What goals does your customer have? What motivates them?

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What problems do your customers face? What are their stress triggers?

Can your product overcome any of those problems?

What objections might they have to buying your product or service?

What brings joy to your customer?



Marketing goals

Your marketing plan will vary based on how your company measures marketing team success. Determine what success looks like for your team. Then talk to the CEO and any other key stakeholders, and make sure you're all on the same page.

Here are examples of success measures for each of the following goals:

- Brand awareness - social media followers, news coverage, mentions online, traffic to your website
- Leads - new subscribers to your email list, number of marketing generated leads
- Customer engagement - email open rate, reviews written, customer interaction on social media, events, etc.
- Brand advocacy - number of positive reviews written, social media mentions, word of mouth referrals
- Customer retention - recurring revenue, upgrades, referrals

Add any other goals to the bottom rows of the table.

Goal	Importance	How success is measured
Brand awareness		
Sourcing leads and prospects		
Customer engagement		
Brand advocacy		
Customer retention		



Competitor Analysis

	Competitor 1	Competitor 2	Competitor 3
Top product features			
Value proposition			
Branding <i>(Messaging, tagline, core values)</i>			
Channels used			
Blog <i>(Frequency of publishing, topics, CTAs)</i>			
Keywords <i>(What keywords your competitor ranks for)</i>			
Community <i>(Social media engagement, events, Facebook and LinkedIn groups, etc.)</i>			
Email marketing <i>(Rate of email send, content shared)</i>			
Publicity			
Campaigns			
Events hosted by competitor			
Events sponsored by competitor			



SWOT Analysis

Now that you understand your competitors, complete the SWOT analysis to understand where you fit in the competitive landscape.

Internal Strengths	Internal Weaknesses
<ul style="list-style-type: none">↳ Lorem Ipsum↳ Lorem Ipsum↳ Lorem Ipsum	<ul style="list-style-type: none">↳↳↳
External Opportunities	External Threats
<ul style="list-style-type: none">↳↳↳	<ul style="list-style-type: none">↳↳↳

SWOT Analysis action items	
Strengths	<p>What strengths do we have over our competitors?</p> <input type="text"/> <p>How will we use those strengths in our marketing messaging?</p> <input type="text"/>
Weaknesses	<p>What weaknesses do we need to improve on?</p> <input type="text"/> <p>What actions will we take to overcome those weaknesses?</p> <input type="text"/>
Opportunities	<p>What opportunities do we have?</p> <input type="text"/> <p>How can we use our strengths to maximize those opportunities, and what actions will we take?</p> <input type="text"/>
Threats	<p>How can we use our strengths and opportunities to prepare for threats?</p> <input type="text"/>



Channel Selection:

Fill out the following worksheet to determine which channels are more important for your marketing activities. Make sure that success measures are all quantifiable – you should be able to put a tangible number on what success looks like for each channel.

Here are a few examples of success measures:

- Social media: Number of followers, traffic from social media, likes, shares
- Email marketing: Number of subscribers, email open rate, clicks

Channel	Goal	Budget cost	Time cost	Success measures	Expected impact
Social media					
Website					
Content marketing & SEO					
Paid advertising					
Email marketing					
Direct mail					
Pay-per-click advertising (PPC)					
Public relations					

Channel	Goal	Budget cost	Time cost	Success measures	Expected impact
Word of mouth marketing					
Offline advertising (TV, Radio, Billboards, Print)					
Events					
Printed materials (Case studies, one-pagers, etc.)					





Marketing tools and software

Marketing success depends on the ability to track and measure what you do. Software enables you to do this, as well as execute your marketing tactics.

When researching which marketing software is best for your brand, be sure to check out solutions and reviews from other marketers like yourself on [G2's marketing software categories](#).

Depending on your company, some of the rows may overlap. Skip any not relevant for your brand, and add any additional types of software to the bottom rows of the table.

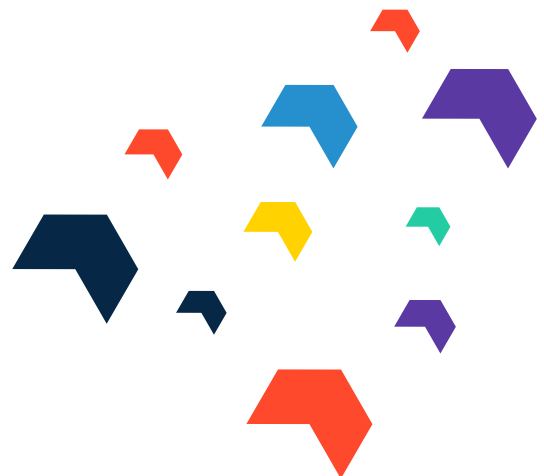
Software	Goal of the software	Cost	Who uses it	Success measures
Email marketing				
Social media marketing				
Website platform				
Graphic design software				
SEO				
Content management software (your blog)				
Demand and lead generation				
Event management				



Software	Goal of the software	Cost	Who uses it	Success measures
Public relations software				
<i>Other</i>				
<i>Other</i>				
<i>Other</i>				

Make sure you're not signing up or paying for software you don't need. With **G2 Track**, you can ensure you don't have duplicate accounts and that all seats being paid for are being used. If your team is small, track how much of your budget is going towards software and see where you can save.

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Putting it all together: Your strategic marketing plan

It's time to take the previous elements and put them together into your action plan. The amount of goals you have will depend on the size of your team.

If you are a small marketing team (or a team of one), don't overstretch yourself. Use the first two rows to determine what to focus on. It's better to do a few items really well that have an impact on the business rather than spread yourself too thin.

	Goal 1	Goal 2	Goal 3
Business impact			
Level of importance			
Tactics			
Channels <ul style="list-style-type: none">• Channel 1• Channel 2• Channel 3• etc.			
Budget			
Internal resources: <ul style="list-style-type: none">• Team members• Time cost			
External resources: <ul style="list-style-type: none">• Services• Supplies to buy• Tools/software• etc.			
Timeline: <ul style="list-style-type: none">• Start date• Additional deadlines			
Success metrics <ul style="list-style-type: none">• Metric 1• Metric 2• Metric 3• etc.			



Measuring Success

Don't wait until the end of the half or the end of the quarter to check in on your success metrics. Set your key objectives using specific, measurable goals that have a numerical value. Then, check in every month to measure how close you are to your goal.

If you're falling short on an important goal, don't hesitate to pivot. Your marketing plan isn't set in stone; know when to let things go or try something new.

You may even find out the objective you set isn't the best measure of success. It's okay to change that, too!

Objectives	Key results to measure	Progress towards goal		
		Month 1	Month 2	Month 3
Goal	1.			
	2.			
	3.			
	4.			
Goal	1.			
	2.			
	3.			
	4.			
Goal	1.			
	2.			
	3.			
	4.			

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