

THE ULTIMATE MARKETING PLAN WORKBOOK



A free, easy-to-follow workbook designed to let even inexperienced business owners create complete, comprehensive marketing plans and unlock your brand's full potential.



Goal Setting
Target Market Definition
Competition Analyzation



Strengths & Opportunities
Campaign Planning
Timing & Frequency



Budget Management
Implementation
Evaluation

Purpose

1. Determine the current situation of your business

This allows you to define what makes your business unique and why your customers love you. This is essential in order to allow you, your employees, and marketing companies like Nivek to grasp a thorough understanding of your brand and develop personalised tactics that are designed to reach and engage potential customers.

2. Define your goals

A vital part of any business is setting realistic goals. This workbook will help you define your objectives and devise tactics to achieve them.

3. Specify your target market

In order to reach and attract new customers, you must have a thorough understanding of who your customers are.

4. Brainstorm Ideas

The simple questions in this workbook are designed to recognize the strengths and opportunities of your business. By completing this you will gain an enhanced understanding of what makes your business special and promising avenues to explore.

5. Develop and implement a campaign

Your campaign will be the difference between becoming another business or an outstanding brand. This workbook will cover everything you need to maximize your brand's potential including: competitive advantage, creative strategy, advertising, budgeting, timing and frequency, implementation, evaluation and everything in between.

Part 1:

Your Company

In a few sentences, describe your business: (What do you do?)

What products/services do you offer and how does each contribute to your overall income (%)?

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Are any more profitable than others?

Has your business been experiencing growth, maturity or decline over the past few years?

Where are you located?

What are some of the advantages and disadvantages of this location?

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

How would you describe your pricing? (Low, competitive, premium)

Why?

Does your business experience a peak in business at a certain time during the year? Why?

Are you planning any special events or promotions for the upcoming year?

Have you experienced any issues with your suppliers? Explain.

Industry

What Industry are you in? _____ Is
the industry growing, stable or declining? _____

What are some of the industry trends over the last few years?

Who are the leaders in the industry?

Have there been any industry changes that have affected your business?

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Changes

Effects

Competitors

Who are your main competitors?

What is their main strength within the industry?

Where are they located?

How do your competitors reach their customers? (Where have you seen ads or promotion materials?)

What is your competitive advantage? (What makes you different from your competition? Why do your customers choose you?)

Having trouble?

We're pretty good at this... Get in touch with us below.

Target Market

Who are your customers? In order to reach and engage your customers, you need to know everything about them. Are you selling to end consumers or to businesses? Only one can be your target market — complete their profile below. Be as specific as possible.

Consumer Profile

Age Bracket: _____ to _____

Gender: **M** **F**

Education: _____

Income: _____ to _____

Ethnicity: _____

Married: **Yes** **No**

Children: **None** **1-2** **3-4** **5+** **Other:** _____

Where do they live? _____

Where do they work? _____

Do your customers have a certain interest or hobby? _____

Do your customers read a certain magazine or watch a certain television show?

When and where do your customers often shop?

Business Profile

What types of companies do you sell to?

What do they sell?

How many locations? _____

Where are they located?

How many employees? _____

Do the businesses you serve have common interests? **Yes** **No**

If yes, what is their common interests?

Having trouble?

We're pretty good at this... Get in touch with us below.

How do your customers shop? **In-store** **Online** **Phone**

What do your customers value most? **Price** **Service** **Quality** **Stock** **Availability** **Delivery**

What are your customer's most common complaints? _____

How often do your customers buy from you?

Rarely **Every year** **Every few months** **Every month** **Every week**

Part 2:

Current Marketing Identity

Do you have a consistent theme you utilize across all platforms and content? **Yes** **No**

If yes, explain the theme or concept: _____

Do you believe your website truly captures the essence of your business and clearly proclaims what makes your brand unique? **Yes** **No** **Somewhat**

Are you happy with where your website is displayed in major search engines? (ie. Google)
Yes **No** **Somewhat**

Is your website mobile and tablet optimized? **Yes** **No**

Advertising

Are currently or have you previously invested in any of the following advertising mediums? Rate their effectiveness.

Newspaper	1	2	3	4	5	6	7	8	9	10	_____
Magazine	1	2	3	4	5	6	7	8	9	10	_____
Television	1	2	3	4	5	6	7	8	9	10	_____
Radio	1	2	3	4	5	6	7	8	9	10	_____
Internet	1	2	3	4	5	6	7	8	9	10	_____
Outdoor	1	2	3	4	5	6	7	8	9	10	_____
Directory	1	2	3	4	5	6	7	8	9	10	_____
Other	1	2	3	4	5	6	7	8	9	10	_____

Having trouble?

We're pretty good at this... Get in touch with us below.

When ads were not effective, what factors do you believe caused this and what could have been improved? _____

Direct Response

Email Marketing	1	2	3	4	5	6	7	8	9	10	_____
Direct Mail	1	2	3	4	5	6	7	8	9	10	_____
Catalogue	1	2	3	4	5	6	7	8	9	10	_____
Info-mercials	1	2	3	4	5	6	7	8	9	10	_____
TV Shopping	1	2	3	4	5	6	7	8	9	10	_____
Telemarketing	1	2	3	4	5	6	7	8	9	10	_____

When activities were not effective, what factors do you believe caused this and what could have been changed? _____

Social Media

Facebook	1	2	3	4	5	6	7	8	9	10	_____
Instagram	1	2	3	4	5	6	7	8	9	10	_____
Twitter	1	2	3	4	5	6	7	8	9	10	_____
LinkedIn	1	2	3	4	5	6	7	8	9	10	_____
Pinterest	1	2	3	4	5	6	7	8	9	10	_____
Other	1	2	3	4	5	6	7	8	9	10	_____

When activities were not effective, what factors do you believe caused this and what could have been changed? _____

Sales Promotions

Sales	1	2	3	4	5	6	7	8	9	10	_____
Coupons	1	2	3	4	5	6	7	8	9	10	_____
Gift Cards	1	2	3	4	5	6	7	8	9	10	_____
Contests	1	2	3	4	5	6	7	8	9	10	_____
Point of Purchase	1	2	3	4	5	6	7	8	9	10	_____
Displays	1	2	3	4	5	6	7	8	9	10	_____
Motion Menus	1	2	3	4	5	6	7	8	9	10	_____

When activities were not effective, what factors do you believe caused this and what could have been changed? _____

Optimization & Tools

SEO	1	2	3	4	5	6	7	8	9	10	_____
Blog	1	2	3	4	5	6	7	8	9	10	_____
Branded Videos	1	2	3	4	5	6	7	8	9	10	_____
Motion Graphics	1	2	3	4	5	6	7	8	9	10	_____
Directory Listings	1	2	3	4	5	6	7	8	9	10	_____
Trade Shows	1	2	3	4	5	6	7	8	9	10	_____
Brochures	1	2	3	4	5	6	7	8	9	10	_____
Stationary <small>(ie. Business Cards)</small>	1	2	3	4	5	6	7	8	9	10	_____
Sales Manager	1	2	3	4	5	6	7	8	9	10	_____
Sales Rep(s)	1	2	3	4	5	6	7	8	9	10	_____

When activities were not effective, what factors do you believe caused this and what could have been changed? _____

Notes: _____

Part 3:

Goal Setting

In order to reach your goals we must define them.

When setting your objectives it is important to be realistic and consider factors like your prior growth rates, industry trends, your budget, and your competitors.

	Current	1 year	2 years	3 years
Sales Revenue (\$)	_____	_____	_____	_____
Profit Margin (%)	_____	_____	_____	_____
Market Share (%)	_____	_____	_____	_____

Other Objectives

Not all goals are numbers, maybe you want to move to a newer location or expand into a new region.

Tell us about it here: _____

Having trouble?

We're pretty good at this... Get in touch with us below.

Part 4:

SWOT Analysis

In the previous steps you told us a lot about your business, industry, competitors and your prior experiences — using this information, it is time to complete a SWOT analysis. A SWOT analysis focuses on the strengths, weaknesses, opportunities and threats of your business. In the following steps it will be useful to emphasise the strengths and capitalize on the opportunities you recognize. Furthermore, this analysis will allow you to recognize and neutralize potential threats, and define weaknesses that should not be a focal point in your final campaign.

Strengths

Strengths are internal factors that your company excels at. Maybe your products are the highest quality on the market, or you have 24/7 sales support. These are areas you want to focus on in your campaign. Outline what makes you different here:

Having trouble?

We're pretty good at this... Get in touch with us below.

Weaknesses

Weaknesses are internal factors that are less desirable for your company. Every company has weaknesses, maybe you have limited parking available or are experiencing a large amount of returns. Outline it here:

Opportunities

Opportunities external factors that offer potential gains for your business. An opportunity can often be drawn from a competitor's weakness, or changes in the market. An example of an opportunity could be lowering costs from your supplier, or expansion into a market that has low saturation. Outline anything you could capitalize on here:

Threats

Threats are external factors that could inhibit your business in anyway. Threats can arise in a number of ways from the arrival of new or improved competition to the implementation of new regulations.

Outline any potential threats your business could face:

Having trouble?

We're pretty good at this... Get in touch with us below.

Part 5:

Devising a Campaign

The first step in formulating a successful marketing campaign is determining what to focus on. It is important to centre your campaign on what makes you different from your competition. Take a look back at your competitors, determine their common weaknesses, and compare that with the strengths and opportunities you recognized in your SWOT analysis. Strength where your competitors show weakness is your competitive advantage, write it down here:

Having trouble?

We're pretty good at this... Get in touch with us below.

Slogan

Now that you have determined the focal point of your campaign, it is time to come up with a slogan. The purpose of a slogan is to be short, catchy and memorable. A successful slogan will remain in your customer's minds, and be instantly associated with your brand upon recollection.

There are two types of slogan: a brand slogan and a campaign slogan. A brand slogan represents your entire company, and will rarely be changed. A campaign slogan a current special event or promotion, and may change from campaign to campaign. Regarding Subway, an example of a successful brand slogan is **"EAT FRESH,"** while an example of a successful campaign slogan is **"\$5 FOOTLONGS."**

Depending on the size of your company, you may want to choose whether to devise a brand slogan, a campaign slogan, or both. Take a look at your competitive advantage, a slogan should have to do with what makes your business special. Do some brainstorming here:

Write your final slogan here: _____

Creative Concept

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

We're pretty good at this... Get in touch with us below.

Part 7:

Marketing Planning

Now it's time to get into the details of your campaign.

Set your first year marketing budget below.

BUDGET _____
ex. \$25,000

Outlined on the following pages are the marketing areas to consider. It is important to look back at your target market when planning your marketing, only invest in activities that will reach your target market. Be specific, choose spaces based on your target demographics, interests and saturation. For example, it would be ineffective to invest in newspaper advertising if your target is the in their twenty-somethings. You'd likely look to online or social media alternatives in this case.

Do your research. This step is essential to making the most of your budget.

Advertising

Total allocated budget towards advertising activities (%): _____ = \$ _____

Newspaper

What newspaper? _____

How often? _____

Why this newspaper? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for newspaper campaign? _____

What size of ad? _____

How much to produce ad? \$ _____

How much does each placement cost? _____

Total budget consumption over 1 year? _____

\$ _____

Having trouble?

We're pretty good at this... Get in touch with us below.

Magazine

What magazine? _____

How often? _____

Why this magazine? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for magazine campaign? _____

What size of ad? _____

How much to produce ad? \$ _____

How much does each placement cost?

Total budget consumption over 1 year?

\$ _____

Television

What station? _____

What time slot/program? _____

How often? _____

Why this station? _____

Why this time slot/program? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for commercial? _____

How long of spot? (15, 30 or 60 seconds)

How much to produce commercial?

\$ _____

How much does each placement cost?

Total budget consumption over 1 year?

\$ _____

Having trouble?

We're pretty good at this... Get in touch with us below.

Radio

What station? _____

What time of day? _____

How often? _____

Why this station? _____

Why this time slot? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for commercial? _____

How long of spot? (15, 30 or 60 seconds)

How much to produce commercial?

\$ _____

How much does each placement cost?

Total budget consumption over 1 year?

\$ _____

Internet

Type: Pay-per-click Web banner Other

What websites? _____

How often? _____

Why these websites? _____

If PPC, what keywords or phrases will you use to reach your target? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for web campaign? _____

What size of ad(s)? _____

How much to produce ad? \$ _____

How much does each placement/click cost?

Total budget consumption over 1 year?

\$ _____

Outdoor

Type: Billboards Posters Benches Bus

Shelters On Transit Other: _____

How long? (Monthly, quarterly) _____

Why did you choose this? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for campaign? _____

What size of ad? _____

How much to produce ad? \$ _____

How much does each placement cost?

Total budget consumption over 1 year?

\$ _____

Directory

What directory? _____

How often? _____

Why this directory? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for campaign? _____

What size of ad? _____

How much to produce ad? \$ _____

How much does each placement cost?

Total budget consumption over 1 year?

\$ _____

Having trouble?

We're pretty good at this... Get in touch with us below.

Other

What is it? _____

How often? _____

Why this? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for campaign? _____

How much to produce? \$ _____

How much does each placement cost?

Total budget consumption over 1 year?

\$ _____

Direct Response

Total allocated budget towards direct response activities (%): _____ = \$ _____

Type: Email marketing Direct mail Catalogue

Info-mercials TV shopping Telemarketing

How often? _____

Why this? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for campaign? _____

How much does each type cost?

Total budget consumption over 1 year?

\$ _____

Having trouble?

We're pretty good at this... Get in touch with us below.

Social Media

Social media accounts are free! Post content your customers will find interesting and valuable. Be sure to get on every social media site that your target market is on.

	Customers actively use		You have an active, valuable account		
Facebook	Yes	No	Yes	No	Somewhat
Instagram	Yes	No	Yes	No	Somewhat
Twitter	Yes	No	Yes	No	Somewhat
LinkedIn	Yes	No	Yes	No	Somewhat
Pinterest	Yes	No	Yes	No	Somewhat
YouTube	Yes	No	Yes	No	Somewhat
Google+	Yes	No	Yes	No	Somewhat
Vine	Yes	No	Yes	No	Somewhat
Other: _____	Yes	No	Yes	No	Somewhat

Sales Promotions

Total allocated budget towards sales promotion activities (%): _____ = \$ _____

Type: Sales Coupons Gift Cards Contests

Point-of-purchase displays Motion menus

How often? _____

Why this? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for promotions? _____

How much will this cost?

Total budget consumption over 1 year?

\$ _____

Optimization

Total allocated budget towards optimization activities (%): _____ = \$ _____

Type: SEO Blog Branded videos Directory

Listings Trade shows

How often? _____

Why this? _____

Does this satisfy your target? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Ideas for promotions? _____

How much will this cost?

Total budget consumption over 1 year?

\$ _____

Having trouble?

We're pretty good at this... Get in touch with us below.

Sales Tools

Total allocated budget towards sales tools (%): _____ = \$ _____

Type: Brochures Stationery Sales Manager

Sales Rep(s) _____

Sales team & responsibilities? _____

Training required? _____

What target will this satisfy? _____

What results do you expect? _____

Advantages? _____

Disadvantages? _____

Sales strategy? _____

How much will this cost?

Total budget consumption over 1 year?

\$ _____

Part 8:

Scheduling

When planning a marketing campaign, timing is vital to maintain a desired level of awareness while making the most of your budget. When scheduling your marketing activities it is important to consider external factors like seasonal trends and community events and internal factors like allocated budget and marketing strategies.

There are three main scheduling tactics used to satisfy marketing strategies and generate desired levels of awareness within your target community.

Continuous: Messages and activities are scheduled fairly continuously in order to maintain a consistent level of awareness.

Flighting: Messages and activities appear heavily during certain periods of time separated by periods in which no messages or activities are active. A period of high activity is called a flight, and generates high levels of awareness while periods of no activity are called a hiatus, and awareness will diminish. This tactic is ideal for a business that experiences seasonal demand.

Pulsing: Messages and activities are active at all times, but there are notable periods in which drastically more or less spending occurs. This is ideal for new product launches or promotions.

On the following page is an example of a marketing scheduling plan, you may also download our interactive template [here](#) and complete your own.

Having trouble?

We're pretty good at this... Get in touch with us below.

Scheduling Plan 2017

Company Name

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Advertising												
Newspaper												
Magazine												
Television												
Radio												
Internet												
Outdoor												
Directory												
Other												
Direct Resp.												
Email Marketing												
Direct Mail												
Catalogue												
Info-mercials												
TV Shopping												
Telemarketing												
Sales Promo												
Sales												
Coupons												
Gift Cards												
Contests												
POP Displays												
Motion Menus												
Optimization												
SEO												
Blog												
Trade Shows												
Branded Videos												
Directory Listings												
Sales Tools												
Brochures												
Stationery												
Sales Manager												
Sales Rep(s)												

Part 9:

Implementation

Now it's time to put your plan into action, be sure to pay regular attention to your goals, planning and scheduling. If necessary, make small adjustments, but it is important to stick to your overall tactics and remain bound to your plan in order to be as successful as you can.

Having trouble?

We're pretty good at this... Get in touch with us below.

Part 10:

Evaluation & Future Opportunities

It's now time to evaluate. Be blunt — take notice of what worked and what didn't and try to determine the factors that made certain aspects successful and others not so successful. The more detailed you analyze the results of your campaign, the more efficient and successful you can make your next one!

Ask the following questions:

Did you reach your goals? _____

Did you stay in budget? _____

Was your campaign strategy effective? _____

Did your marketing activities produce the results you expected? Explain. _____

Did your target audience reach a desired level of awareness? Explain. _____

Do you need to make any adjustments to your target audience? Explain. _____

Did your creative strategy effectively capture the interest of your target audience? Explain. _____

What have you noticed about your competitors? _____

Was your competitive advantage sustainable over the course of your plan? Explain. _____

Was your timing and frequency efficient and effective? _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Part 11:

Restart

You've learned a lot over the past year and have likely noticed many ways in which you could improve your results the next time around. Take a look at your evaluation and future opportunities. It's time to use your experience and begin planning for year two!