# Instructions

How to use this template:

1. Read the instructions carefully. This will help you understand how to fill out the template and what information is required. **This template is meant to serve as a guide only. You may wish to add, delete, or modify sections based on the intended audience of your plan.**
2. Fill out each section of the template. Be sure to provide as much detail as possible.
3. Review your marketing plan. Once you have filled out the template, take some time to review it and make sure it is complete and accurate.
4. Share your marketing plan with others. Get feedback from your team or colleagues to ensure that your plan is sound.

Tips for tailoring your marketing plan:

1. The structure of this document is a guide only. You may need to delete or add sections depending on your business type or the intended audience of your plan.
2. Be sure to tailor the language and tone of your plan to your target audience.
3. Use visuals to help illustrate your points.
4. Keep your plan concise and easy to read.

[**cambridgesavings.com**](https://www.cambridgesavings.com/)

Marketing Plan for [Enter business name here]

# [Business Name] At-a-glance

Date: [x]

## Company Information

|  |  |
| --- | --- |
| Doing Business As |  |
| Business Structure (LLC, Sole Proprietorship, etc.) |  |
| Telephone |  |
| Email |  |
| Address |  |
| Mailing Address (If Different from Address) |  |
| Website |  |

**Plan prepared:** [MM/DD/YYYYY]

**Prepared by:** [Name of Preparer]

**Copy:** [##/##]

Table of Contents

[Instructions 1](#_Toc141341054)

[[Business Name] At-a-glance 2](#_Toc141341055)

[Company Information 2](#_Toc141341056)

[Executive Summary 4](#_Toc141341057)

[Company Brand 5](#_Toc141341058)

[Mission, Vision, and Values 5](#_Toc141341059)

[Building and Maintaining Your Brand 6](#_Toc141341060)

[Market and Competition 8](#_Toc141341061)

[Market Research Methodology and Key Takeaways 8](#_Toc141341062)

[Competitor and Customer Analysis 9](#_Toc141341063)

[SWOT Analysis 11](#_Toc141341064)

[Marketing Mix and Measurement 12](#_Toc141341065)

[Products/Services 12](#_Toc141341066)

[Pricing 13](#_Toc141341067)

[Placement 14](#_Toc141341068)

[Promotional Strategy 15](#_Toc141341069)

[Promotional Tactics 17](#_Toc141341070)

[Measuring and Reporting Results 19](#_Toc141341071)

# Executive Summary

[Insert text – Concisely describe your business, including your primary customer base, value proposition, and key takeaways from the marketing plan.]

# Company Brand

## Mission, Vision, and Values

### Mission

[Insert text – A mission statement is a brief statement that describes an organization's purpose and overall intention.]

### Vision

[Insert text - A vision statement is an aspirational statement that creates a mental image of the ideal state that the organization wishes to achieve.]

### Values

[Insert text - A values statement lists the core principles that guide and direct the organization and its culture and creates a moral compass for the organization and its employees.]

## Building and Maintaining Your Brand

### What does your business brand mean?

[Insert text - Is there a story behind your brand or the name of your business? What feelings does that story evoke for you, and how do you want your customers to feel when they think of your brand?]

### How will you align all your marketing materials and online branding?

[Insert text – How will you ensure consistency across marketing materials without them getting stale or looking the same? Consider the points below or add your own.]

#### Grammar

#### Tone

#### Logo Usage

#### Colors

#### Visuals

#### Word Usage

#### Point Of View

#### Other

### What will your logo look like?

[Paste your logo below or Insert text describing it.]

# Market and Competition

## Market Research Methodology and Key Takeaways

### What market research have you done?

[Insert text – Describe the market research you have performed thus far and how you will continue to use market research to evolve your strategy.]

### What insights have you gained about your customers?

[Insert text – Detail what you have discovered about potential customers in your target market. How will these findings help your business grow in the marketplace?]

### What insights have you gained about your competitors?

[Insert text – Note any important information you’ve found out about your competitors through market research. Have you identified a customer need your competition is not meeting?]

## Competitor and Customer Analysis

### Who are your main competitors?

[Fill out the table below with the strengths and weaknesses of at least three key competitors.]

|  |  |  |
| --- | --- | --- |
| Competitor | Strengths | Weaknesses |
| [Insert text] | [Insert text] | [Insert text] |
| [Insert text] | [Insert text] | [Insert text] |
| [Insert text] | [Insert text] | [Insert text] |

### How will you combat their strengths and target their weaknesses?

[Insert text]

### What is your target market for your products/services?

[Insert text – If you have more than one target market, you may list them all. Be as specific as you can.]

### If you’ve created a customer persona, outline the details below.

[Insert text – Have you thought about creating customer profiles of the specific types of people you plan to target? If so, discuss this here. Check out [this link](https://www.semrush.com/blog/buyer-persona/?kw=&cmp=US_SRCH_DSA_Blog_EN&label=dsa_pagefeed&Network=g&Device=c&utm_content=622080544485&kwid=dsa-1754723164073&cmpid=18348486859&agpid=145169394950&BU=Core&extid=60113850002&adpos=&gad=1&gclid=CjwKCAjw04yjBhApEiwAJcvNoZxxZjrmGNhKhxKIS5VnqUqopD0cNBo8_TcM0HRr6Ulo1IPcd13NMxoCMU0QAvD_BwE) for more information on creating customer personas.]

### List the most effective ways of approaching your target customers.

[Insert text – Note each method you intend to use to market your offerings to potential customers.]

|  |  |  |
| --- | --- | --- |
| **Market segment/persona** | **Channels** | **Messaging/value proposition** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## SWOT Analysis

### What are your business’s strengths, weaknesses, opportunities, and threats?

[Fill out the SWOT analysis below by listing your business’s strengths, weaknesses, opportunities, and threats in the left column. Detail how you could mitigate threats and weaknesses and leverage strengths and opportunities on the right.]

|  |  |
| --- | --- |
| Strengths | *I will leverage them by:* |
| [Insert text] | [Insert text] |
| Weaknesses | *I will mitigate them by:* |
| [Insert text] | [Insert text] |
| Opportunities | *I will leverage them by:* |
| [Insert text] | [Insert text] |
| Threats | *I will mitigate them by:* |
| [Insert text] | [Insert text] |

### How does your SWOT analysis inform your business strategy?

[Insert text – Identify the strategic direction for your business as it relates to your SWOT analysis. For example, S–O: Exploit your internal strengths to maximize your external opportunities. Think about how to mitigate your weaknesses and play to your strengths and identify which items in each category are most relevant to your strategy.]

# Marketing Mix and Measurement

## Products/Services

### What products/services are you selling?

[Insert text – list each of the products/services your business will offer. Use as much detail as possible and specify which segment they will appeal to, if you offer different products/services for different market segments.]

### Why will potential customers buy your offerings?

[Insert text – Explain why customers will purchase your products/services rather than your competitors’. What differentiates your offerings?]

## Pricing

### How much will you be selling each of your products/services for?

[Insert text – List the prices, or ranges of prices, you plan on charging customers.]

### How have your competitors priced their products/services?

[Insert text – Research competitors and detail their main competing goods or services here, along with the prices they’re charging.]

### If you have relatively high prices, how will you justify them?

[Insert text – if your business has prices higher than your competitors’, explain how you plan to justify these higher prices.]

### If you plan to compete on low prices, how will you keep them low?

[Insert text – Think about ways you could minimize overhead costs, reduce your cost of goods sold, or lower prices through seasonal promotions or price matching.]

## Placement

### Where will your products be available for sale?

[Insert text – Are you exclusively selling through a brick-and-mortar location, or will you employ a mix of in-person and online sales?]

### How will your product placement change as your market share grows?

[Insert text – Do you have any plans to test an online channel or acquire another physical location?]

## Promotional Strategy

### What are the features, advantages, and benefits of your offerings?

[Insert text – Discuss these in relation to how you’ll advertise your goods or services.]

### What’s your advertising message?

[Insert text – How will you show the benefits of your products/services and suggest a need or a problem that your offerings can solve for consumers? Do you have a slogan?]

### What’s your overall marketing budget?

[Insert text – How much money do you have to spend on marketing activities as a whole?]

### How will you raise awareness of your business/brand?

[Insert text – Write down any upcoming events, activities, sponsorships, or contests you’re planning to create to increase awareness of your brand.]

### How will you use marketing to drive sales?

[Insert text – Consider options like sending out coupons in a weekly newspaper to draw in customers to your place of business. Is there an opportunity to place your product in a TV show, film, or webpage to increase your visibility?]

## Promotional Tactics

### How will you use online marketing to increase sales and brand awareness?

[Insert text – How will online channels drive your marketing? Consider each of the areas below and detail how it factors into your marketing activities or delete rows that are not applicable.]

|  |  |
| --- | --- |
| Search Engine Optimization (SEO): The process of optimizing your website's content and structure to improve its visibility and ranking in search engine results pages. |  |
| Social Media Marketing: The use of social media platforms to promote your brand, engage with customers, and drive website traffic. |  |
| Content Marketing: The creation and sharing of valuable, relevant, and consistent content to attract and retain a clearly defined audience and drive profitable customer action. |  |
| Email Marketing: The use of email to promote your products and services, build relationships with customers, and drive website traffic. |  |
| Search Advertising: A form of online advertising where your ads may trigger when a consumer types a relevant query into a search engine. |  |
| Display Advertising: The use of banner ads and other visual ads to promote your products and services on websites and social media platforms. |  |
| Affiliate Marketing: A form of performance-based marketing where you pay affiliates to promote your products and services and drive sales. |  |
| Video Marketing: The use of video content to promote your brand, engage with customers, and drive website traffic. |  |
| Influencer Marketing: The use of social media influencers to promote your brand, products, and services to their followers. |  |
| Other |  |

### Which online and social media platforms will your business utilize and why?

[Insert text – Discuss which platforms you’ve chosen and why they will be the most useful for your business. If you plan to create a blog or run a website, include these details too.]

|  |  |  |  |
| --- | --- | --- | --- |
| Website | [Enter address] | Blog | [Enter address] |
| LinkedIn | [Enter address] | TikTok | [Enter address] |
| Facebook | [Enter address] | YouTube | [Enter address] |
| Instagram | [Enter address] | Tumblr | [Enter address] |
| Twitter | [Enter address] | Pinterest | [Enter address] |
| Reddit | [Enter address] | Other | [Enter address] |

## Measuring and Reporting Results

### Which channels will you use most for advertising your business, and how will you measure success?

[Insert text – Give a brief overview of which channels you will use most, and which key performance indicators (KPIs) will be measured for each.]

|  |  |
| --- | --- |
| Channel | Key Performance Indicators (KPIs) |
| Search Advertising |  |
| Display Advertising |  |
| Email Marketing |  |
| Social Media Marketing |  |

*Tip: Check out the* [*Business Calculators page*](https://www.cambridgesavings.com/small-business/quicklinks/calculators) *on cambridgesavings.com for help with calculating return on investment (ROI) for marketing channels, marketing conversion rate, and more helpful metrics.*