



Marketing Plan Workbook

The ultimate resource guide to planning your
small business marketing strategy



welcome

Failing to plan is planning to fail.

A marketing plan helps you promote products and services in your business that meet the needs of your target market. It should be the engine that powers, steers and grows the success of your business.

A marketing plan requires research, time and commitment, but is a very valuable process that can greatly contribute to your business success.

When writing a marketing plan you need to be clear about your marketing objectives and how you're going to achieve them.

That's why I've created this workbook - so you can see what areas to consider, how to benchmark your success and growth opportunities your company may be missing.

I'm so excited to have you on board.
Let's get started!



Dan MacInnis

MEET YOUR MARKETING COACH, DAN

Hey, I'm Dan!

A strategic marketing specialist with a focus on a broad range of digital marketing tactics and love a good chai.

After working full time for large corporates including Hewlett-Packard for over 10 years, I decided it was time to work from home and started my own marketing agency especially for small to medium businesses.

I'm here to offer to take away some of the stress and let you focus on why you started your business in the first place – creating, designing and delivering quality products.

I'm passionate about connecting brands with consumers and building a relationship that keeps them coming back! If you're looking for digital that is exciting, engaging and on-brand then you've come to the right place.

Dan MacInnis



Doing business without advertising is like winking at a girl in the dark. You know what you are doing, but nobody else does.

YOU'RE IN THE RIGHT PLACE IF...



You want more customers, more income and more profitability within your business.



You've never drafted a marketing plan before and are unsure where to start.



You're ready to look beyond where your business is now, and plan for future growth

MY PROMISE TO YOU...



Learn to identify your target market and understand how your product or service meets their needs.



Set specific, measurable goals and time frames for your marketing activities.



Confidently map out a strategy to reach your target audience, including the messages, channels and tools you will use.

01

Marketing Plan Summary

A synopsis of the marketing plan which is usually filled in last. This section will give yourself an overview of what the plan contains.

02

The Business

Analyse the internal and external factors affecting your business and enhance the way in which you take a new product or service to market.

03

The Future

Where does your company aspire to be in the future and what are your marketing goals and strategies to get there?

04

The Market

Analyse and identify your target audience and conduct a competitor analysis.

05

The Finances

Forecast a prediction of sales for the next financial year based off previous years and create a marketing budget.



module

MARKETING PLAN SUMMARY



The summary is a synopsis of the marketing plan and is usually filled in last. It should not contain detailed information but rather give yourself and your team an overview of what the plan contains.

summary

The Business

The summary is a synopsis of the marketing plan and is usually filled in last. It should not contain detailed information but rather give yourself and your team an overview of what the plan contains.

BUSINESS NAME:

What is your business name?

BUSINESS STRUCTURE:

What type of business are you? E.g. Company

ABN NUMBER:

What is your ABN number?

BUSINESS LOCATION:

Where is your business located? Enter your address

YEAR ESTABLISHED

What year was your business established?

summary

The Business

BUSINESS OWNER

Who is the owner(s) of the business?

PRODUCTS / SERVICES

What products / services do you offer?

WEBSITE & SOCIAL MEDIA

Do you have a website? What social media platforms do you use?

*Strategy is a fancy word for coming up with
a long term plan and putting it into action.*

summary

The Future

VISION STATEMENT

In one sentence describe where the company aspires to be in the future. What do you want to achieve / accomplish?

GOALS & OBJECTIVES

Summarise your goals and the strategies you plan on implementing to achieve these.

It is important to include both short term and long term goals. E.g. Your goal could be to grow your revenue each month by 20% and to do this you might aim to write 5 blog posts per week or sign up 10 people to your email list every week.

summary

The Market

TARGET MARKET

Who is your target market? By now you should have done some market research and have a pretty good idea of whom you are targeting. Summarise your main audience(s) here. If you're not sure, who do you love to work with? Profile your best customer or client.

MARKETING STRATEGY

What is your overall marketing strategy and how do you plan on achieving this? Keep this to 1 – 2 paragraphs.

summary

The Finances

FINANCES OVERVIEW

What is the expected sales growth over the next quarter or year? How much do you plan on allocating to budget for marketing spend each month/quarter?

module

THE BUSINESS



In the business section we will use a SWOT analysis to help you work out the internal and external factors affecting your business. We will also look at the Marketing 4 Ps - price, product, promotion, and place so that your offering meets a specific customer need or demand.

business

S.W.O.T analysis

Using the S.W.O.T analysis table below list your businesses strengths, weaknesses, opportunities and threats.

Strength – Strengths are competitive advantages that give your business an advantage in meeting your consumer's needs.

Weaknesses – Weaknesses are limitations that may affect the business performance. Think about what you could improve.

Opportunities – Opportunities are favourable conditions that the company could act upon that may have a positive impact.

Threats – Threats are conditions that may affect the business reaching its goals. Think about the obstacles you face in getting your product to market,

STRENGTHS

E.g. Strong customer loyalty, competitive pricing, new product offering

WEAKNESSES

E.g. Location, Website not optimised for mobile, product availability, customer service

OPPORTUNITIES

E.g. Collaborate with influencers, expand into international sales, new products

THREATS

E.g. financial problems, increase in competition, price fluctuation.

business

S.W.O.T activity sheet

Using the table below list your strengths and opportunities and activities to address each of these.

STRENGTH/ OPPORTUNITY	ACTIVITY TO ADDRESS	DUE DATE
<i>E.g. Collaborate with influencers</i>	<i>Compile a list of 100 influencers to contact for a collaboration.</i>	<i>E.g. 30th June 2020</i>

business

S.W.O.T activity sheet

Using the table below list your weaknesses and threats and activities to address each of these.

WEAKNESS/ THREAT	ACTIVITY TO ADDRESS	DUE DATE
<i>E.g. Website not optimised for mobile</i>	<i>Hire a web developer to re-develop the website with mobile optimisation as a high priority.</i>	<i>E.g. 30th June 2020</i>

business

marketing mix - 4ps

The 4Ps of marketing is a model for enhancing the way in which you take a new product or service to market. It helps you to define your marketing options in terms of price, product, promotion, and place so that your offering meets a specific customer need or demand.

PRODUCT

What is your product and how does it satisfy the consumer? What are the features?

Is it tangible or intangible? It is important to have a clear idea of what you are selling and why it is unique.

PLACEMENT

Marketing is all about putting your product in the right place at the right

time. Where do you plan on selling your product? Describe in detail where you are planning on distributing your product and why.

PRICING

How do you plan on pricing your product? Are you price competitive? How does your pricing compare to your competitors? Do you offer any discounts?

PROMOTION

How do you plan on promoting your product? What channels will you be using e.g. social media, search engines, email marketing, video marketing, advertising. It is important to utilise a variety of channels to reach your market.

module

THE FUTURE



*Where does your company aspire to be in the future and what are your marketing goals and strategies to get there?
Let's break it down into short and long term goals.*

future

the future

VISION STATEMENT

In one sentence describe where the company aspires to be in the future. What do you want to achieve/accomplish?

MISSION STATEMENT

In one sentence describe your company's core purpose. A statement that aims to summarise the company's values.

future

Goals & Objectives

What are your marketing goals and what strategies are you going to implement to achieve these goals? List as many goals as you like. It is important to include both short term and long term goals. E.g. Your goal could be to grow your revenue each month by 20% and to do this you might aim to write 5 blog posts per week or sign up 10 people to your email list every week.

OUR MARKETING GOALS:

- *E.g. To build a database on ideal prospects over 100*

WE AIM TO ACHIEVE THESE GOALS BY:

- *E.g. Growing our email list by..*

module

THE MARKET



In the business section we identify your target audience and conduct a competitor analysis. This is also where you create your marketing strategy and how you plan on achieving your objectives and goals.

market

unique selling position

UNIQUE SELLING POSITION

What is your unique selling position? What makes your business/product different from the rest? Why should a consumer purchase your product(s)? If you don't know, ask your customers why they buy from you?

market

target audience

TARGET AUDIENCE

Who is your target audience? Include a complete analysis of your

target demographic, geography, behaviours and interests.

Consider sending out a survey to your customers to gain a deeper understanding of

who is purchasing from you and include the results in the appendix.

market

customer purchase process

The customer purchasing process is a framework to better understand a customer's journey and time to conversion.

Refer to the table below as an example.

BUYER STAGE	AWARENESS	CONVERSION	LOYALTY
TIME FRAME	<i>E.g. Day 1 – 3</i> Time to transaction	<i>Day 4</i> Transaction	<i>Day 12</i> Time to review
BUYER'S GOAL	<i>Find a product/service they are in need of.</i> <i>E.g. just joined a gym and need gym clothes.</i>	<i>E.g. They are able to start training at their new gym.</i>	<i>E.g. See improvements in themselves, continue to go to the gym and loose weight, buy new gym clothes.</i>
BRAND'S GOAL	<i>E.g. Educate, build trust, establish a need.</i>	<i>E.g. Provide product information, add to cart, purchase.</i>	<i>E.g. Product review/feedback, repeat purchase</i>
CHANNELS	<i>E.g.</i> • Facebook • Instagram • Google • EDM • Blog	<i>E.g.</i> • Direct • Google	<i>E.g.</i> • Direct • Email

market

competitor analysis

Conduct a competitor analysis and analyse their strengths and weaknesses.
Understanding your competition will give you a competitive advantage.

COMPETITOR	EST. DATE	SIZE (APPROX)	STRENGTH	WEAKNESS
E.G. FIT ELITE	<i>E.g. 2002</i>	<i>E.g. \$8k sales / month</i>	<i>- Brand name - Competitive pricing</i>	<i>- Very slow - Can't provide quality service due to little staff</i>

market

market research

To help analyse your target audiences perform market research. This could be in the form of a survey that you send out to your consumers.

ENVIRONMENTAL ANALYSIS

How well do you know the industry you're in? It's essential to conduct environmental / industry research to identify all the internal and external elements that may affect your business. If the industry has seen a decline perhaps it's time to broaden your target audience or you might find that there is a need for a product / service that your competitors do not offer.

market

marketing strategy

Your marketing strategy is how you plan on achieving your objectives and goals. You should choose marketing activities that suit your business and customers.

For example, if your targeting young teens than you wouldn't use newspaper advertising. These strategies should be broken down to include a summary of each method, how you intend to track analyse results and a timeframe. Below is a list of a few common marketing methods. Note: you don't need to use all (if any) of these unless they are relevant to your brand.

SEO (SEARCH ENGINE OPTIMISATION)

Over 80% of first clicks on all results pages come from the top four listings. Whilst the top link is clicked 10x more than the links towards the bottom. Have you performed keyword research? Is your website optimised for SEO? How do you rank for your targeted keywords?

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Check and update meta title and description on all pages.</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

market

marketing strategy

PPC (PAY PER CLICK) - GOOGLE ADS (FORMALLY KNOWN AS ADWORDS)

Adwords is by far the largest and most popular paid search platform. Three main types of campaigns – search, display and google shopping.

Search campaigns allow ads to be eligible to appear on the google results page. They are the most popular due to being very effective through serving to customers further down the marketing funnel already searching with the intent to buy.

Display network ads are shown as banners on other websites. CTR and conversion rates are typically lower on the display network and is better for targeting top funnel customers to promote brand awareness.

Google shopping allows product listing ads to show on the google shopping network and show the product image, price and merchant. Google shopping typically has a higher conversion rate than most forms of PPC and a lower cost per click. As this type campaign does not consider keywords and matches user queries to the product that they deem most relevant, it is important to ensure products have most accurate info as possible.

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Set up Google Merchant Centre and link to Google Ads. Create Smart Shopping Campaign.</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

market

marketing strategy

CONTENT MARKETING

Content marketing is all about telling stories, sharing experiences and nurturing customer relationships. It can increase your conversion rate by up to six percent! Blog posts are a great form content marketing as they drive traffic to your website through SEO and build website authority.

Blog posts should be a variety of styles including:

- *Holiday gift guides*
- *Head to head competitor reviews*
- *Quick read lists packed with products E.g. Top 10...*
- *Informative / How To articles E.g. Step by step guide..*
- *Guest blog post on a subject your readers are interested in.*

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Write blog post on how to smoothie bowl recipe using our vegan protein powder.</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

market

marketing strategy

SOCIAL MEDIA

Marketing is all about putting your product/service in front of the consumer, and where do consumers hang out these days? On social media. Over 1.4 billion people log into Facebook alone daily. It has never been easier to reach consumers than it is today.

What platforms does your ideal consumer use? Facebook, Instagram, YouTube, Twitter or all of the above? Do you have a strong social media strategy in place? Are you utilising Facebook retargeting ads?

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Set up Facebook dynamic catalogue re-targeting campaign to re-target abandon carts.</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

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marketing strategy

INFLUENCER MARKETING

Influencer marketing is one of the top buzz words in marketing. It's essentially taking the idea of celebrity endorsement and places it into a modern-day content-driven marketing campaign. Being associated with influencers is a fantastic way to build trust and authority with your audience.

Are you utilising influencer marketing? Do you have a contract in place stipulating the terms in which both parties agree to – type of content, how often the influencer is required to post and compensation.

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Write influencer contract and terms and contact 10 influencers.</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

market

marketing strategy

EMAIL MARKETING

Building an email list allows you to drive repeat traffic back to your website by providing an incentive to return. This could be in the form of discounts, new products or valuable content. Email marketing is 40x more effective than social media marketing when it comes to generating sales. The reason for this is that you're taking the conversion to the customers most personal online space – their inbox.

Email marketing should consist of strategically planned newsletters and automation. Do you have a newsletter? Do you have abandon cart automation set up? What about a welcome email for new customers?

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Sign up to Mailchimp, Klaviyo or Automate Woo and create 3 part abandon cart flow.</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

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marketing strategy

CRO (CONVERSION RATE OPTIMISATION)

You've done the hard work of driving traffic to your website but without a website optimised for conversions you won't receive the return on investment you deserve. Conversion rate optimisation is the process of increasing the percentage of website visitors to take a desired action such as purchasing a product. CRO involves understanding how users move through your site, the actions they take and what is stopping them from converting.

Is your website easy to navigate? Is it optimised for mobile? Do you have a seamless checkout?

TASK DETAILS	DEADLINE DATE	COMPLETION DATE
<i>E.g. Condukt a comprehensive website audit</i>	<i>E.g. 10th July 2020</i>	<i>E.g. 30th June 2020</i>

module

THE FINANCES



A business must have a strong, well-thought-out marketing plan. You can review it periodically as you move through your marketing process, but it is essential to keep the financial information current because lenders may review it to evaluate you for funding.

finances

expected sales

Forecasting is mainly educated guessing. So don't expect to get it perfect; just make it reasonable. Analyse your sales from previous years to develop a forecast.

	GRAND TOTAL SALES 18-19	GRAND TOTAL SALES 19-20	FORECAST 20-21
Q1 (JUL - SEP)			
Q2 (OCT-DEC)			
Q3 (JAN - MAR)			
Q4 (APR - JUN)			

finances

marketing budget

A marketing budget is a crucial part of any marketing plan. It gives you a clear idea of all the costs associated with carrying out the marketing activities in your plan.

There is no “one size fits all” budget but as a reference for new companies I recommend spending 12 – 20% of gross revenue and 6 – 12% for established companies on marketing.

Check out the below sources to download FREE marketing budget templates!

01

SMARTSHEET

12 Free Marketing Budget Templates

<https://www.smartsheet.com/12-free-marketing-budget-templates>

02

HUBSPOT

8 Free Marketing Budget Templates

<https://blog.hubspot.com/marketing/how-to-manage-marketing-budget-free-budget-templates>

03

MICROSOFT OFFICE

Marketing Budget Plan Estimates

<https://templates.office.com/en-au/marketing-budget-plan-estimates-tm01150737>

04

SCORE

Annual Marketing Budget Template

<https://www.score.org/resource/annual-marketing-budget-template>

APPENDIX

Insert Text Here

The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself - Peter Drucker



LET'S HELP YOUR BUSINESS GROW TO ITS FULL POTENTIAL

If you're looking for digital that is exciting, engaging and on brand then you've come to the right place!

I'm here to offer to take away some of the stress and let you focus on why you started your business in the first place – creating, designing and delivering quality products and services. So if you're looking for marketing assistance then look no further I am your girl!

WWW.MACINNISMARKETING.COM.AU