

| Marketing Plan Guide |
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| | **You can edit your own version in one of two ways:**   1. **Make a copy of this version and edit to fit your needs** 2. **Go to “File” > “Download As” > “Microsoft Word” to Download** | | --- | |
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| How to Use This Template This template should be used as a jumping-off point for your company’s marketing plan. It includes customisable sections for:   | * Business Summary * Business Initiatives * Target Market * Market Strategy | * Budget * Marketing Channels * Marketing Technology * Marketing Plan Schedule | | --- | --- |   Once you’re ready to begin, delete pages 1–3 and start filling out your info below. There will be instructions and sample text, as well as prompts in [brackets] for you to complete as guided.  Remember, you should add/edit/delete any copy or sections as you see fit. |

*\*This template is adapted from HubSpot and Omni Online internal sources*



| Company Name  Marketing Plan | |
| --- | --- |
| Our Objective | Summarize the role your company’s marketing department plays to the growth of your business. This statement should reflect your overall strategy outlined in the pages that follow. |
| Authors of Document | [Name #1]  [Email Address #1]  [Name #2]  [Email Address #2] |



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| Business Summary |
| --- |

## Our Company

[Company name] is a company headquartered in [location of HQ] with offices in [satellite office locations]. The company’s mission is to [mission statement].

## Our Marketing Leaders

| Omni Online Team | Omni Online is [company name]’s Digital Marketing Experts. They will manage our e-commerce website, PPC advertising, SEO and social media marketing. |
| --- | --- |
| [Marketing Leader 2] | [Marketing Leader 2] is [company name]’s [job title of Marketing Leader 2]. They will [brief job description of Marketing Leader 2]. |
| [Marketing Leader 3] | [Marketing Leader 3] is [company name]’s [job title of Marketing Leader 3]. They will [brief job description of Marketing Leader 3]. |

| **Top Tip:** | You might want to call out some of the features that make your marketing team spectacular, such as education, years of experience, and specific areas of expertise. You can also include Omni Online as one of your team members, we’ve filled in our team for you as an example. |
| --- | --- |

## SWOT Analysis

As [company name]’s marketing team, we want to help the brand lean into what it does well, improve what it doesn’t, capitalize on what it can do, and defend against what could challenge it. With that in mind, here is our SWOT analysis for [current year].

| **Strengths** | **Weaknesses** |
| --- | --- |
| What we’re good at.  What’s working.  What our customers like about us. | What we want to fix.  What we want to strengthen.  What we want to become more efficient at. |
| [Enter strengths here] | [Enter weaknesses here] |

| **Opportunities** | **Threats** |
| --- | --- |
| What the industry might soon want.  What we think we’ll be good at.  What will be our differentiator? | What we think could hinder our growth.  What/who we think could take our customers. |
| [Enter opportunities here] | [Enter threats here] |

| Target Market |
| --- |

## Industries

In [current year], we’re targeting the following industries where we’ll sell our product and reach out to customers:

| Industry 1 | This includes [sub-industries where your business might target more specific segments of your audience]. [Example: Industry 1: Food and Beverage. This includes bar & grills, breweries, steakhouses, etc.] |
| --- | --- |

| Industry 2 | This includes [sub-industries where your business might target more specific segments of your audience]. [Example: Industry 1: Food and Beverage. This includes bar & grills, breweries, steakhouses, etc.] |
| --- | --- |

## 

## Buyer Personas

Within our target market(s), we’ve identified the following buyer personas to represent our ideal customers:

| Buyer Persona 1 | For B2B: This includes [sub-industries where your business might target more specific segments of your audience]. [Example: Industry 1: Food and Beverage. This includes bar & grills, breweries, steakhouses, etc.] |
| --- | --- |

| Buyer Persona 2 | For B2C: This includes the consumers' outlines by your buyer persona research (see template) [Example: Surf Fanatic Steve, Mother and Business owner Julia] |
| --- | --- |

| **Top Tip:** | If you haven’t developed or updated your buyer personas yet, you can use our free [Buyer Persona](https://docs.google.com/presentation/d/1hMo4sKLFvQvor1VyxSMmXWXLbmm94CpP0FzEQGaD6AM/edit?usp=sharing) template to make in-depth, visual representations of your customers.  [**Click here to download Buyer Persona Template**](https://docs.google.com/presentation/d/1hMo4sKLFvQvor1VyxSMmXWXLbmm94CpP0FzEQGaD6AM/edit?usp=sharing) |
| --- | --- |

## Competitive Analysis

Within our target market(s), we expect to compete with the following companies:

| Company 1 | |
| --- | --- |
| Products we compete with | [This competitor’s product/service, what it does, and what it might do better than yours] |
| Other ways we compete | [Example: This competitor has a blog that ranks highly on Google for many of the same keywords we would like to write content on] |

| Company 2 | |
| --- | --- |
| Products we compete with | [This competitor’s product/service, what it does, and what it might do better than yours] |
| Other ways we compete | [Example: This competitor has a blog that ranks highly on Google for many of the same keywords we would like to write content on] |

| Company 3 | |
| --- | --- |
| Products we compete with | [This competitor’s product/service, what it does, and what it might do better than yours] |
| Other ways we compete | [Example: This competitor has a blog that ranks highly on Google for many of the same keywords we would like to write content on] |

| Business Initiatives |
| --- |

[Company name] has the ambitious goal of [overarching company goal]. To help the business do that, our marketing team will pursue the following initiatives in [current year]:

| Initiative 1 | |
| --- | --- |
| Description | [Example: Over the next 12 months, we’ll work on building a blog property that becomes a go-to resource for our customers’ burning questions – and our number-one source of leads month over month.] |
| Goal of initiative | [Example: To increase our website’s rank on Google and create critical top-of-the-funnel marketing content that helps our sales team start more conversations with prospects.] |
| Metrics to measure success | [Example: 50,000 organic page views per month / 10 content downloads per month] |

| Initiative 2 | |
| --- | --- |
| Description | [Example: Over the next 12 months, we’ll work on building a blog property that becomes a go-to resource for our customers’ burning questions -- and our number-one source of leads month over month.] |
| Goal of initiative | [Example: To increase our website’s rank on Google and create critical top-of-the-funnel marketing content that helps our sales team start more conversations with prospects.] |
| Metrics to measure success | [Example: 50,000 organic page views per month / 10 content downloads per month] |

| Initiative 3 | |
| --- | --- |
| Description | [Example: Over the next 12 months, we’ll work on building a blog property that becomes a go-to resource for our customers’ burning questions -- and our number-one source of leads month over month.] |
| Goal of initiative | [Example: To increase our website’s rank on Google and create critical top-of-the-funnel marketing content that helps our sales team start more conversations with prospects.] |
| Metrics to measure success | [Example: 50,000 organic page views per month / 10 content downloads per month] |

| Market Strategy |
| --- |

## Product

[Describe the products with which you will enter the target market described in the section above. How will this product solve the challenges described in your buyer persona description(s)? What makes this product different from (or at least competitive against) your competition?]

## Price

[How much are you selling this product for? Is it competitive? Realistic for your customers’ budget? Will you run any seasonal promotions/discounts associated with this product?]

## Promotion

[How will you promote this product? Think more deeply than your blog or social media channels. What about this content will drive value into your product?]

## People

[Who in the marketing department plays a role in your market strategy? Describe what each of them, or each team, will do to bring your market strategy success.]

## Process

[How will the product be delivered to your customer? Is it an ongoing service? How will you support their success with your product?]

## Physical Evidence

[Where is your product displayed? If you sell an intangible product, how would customers produce visible evidence of your business?]

| Budget |
| --- |

Over the course of [current year], given the cash allotted to the Marketing team, we expect to invest in the following items to ensure we meet the objectives outlined in this marketing plan:

| **Marketing Expense** | **Estimated Price** |
| --- | --- |
| [Expense Name] |  |
| [Expense Name] |  |
| [Expense Name] |  |
| [Expense Name] |  |
| [Expense Name] |  |
| [To add more rows to this table, right-click a cell, then select Insert > Rows Above / Rows Below] |  |
| **Total** | **[Total Marketing Team Expense for Current Year]** |

| Marketing Channels |
| --- |

Over the course of [current year], we will launch/ramp up our use of the following channels for educating our customers, generating leads, and developing brand awareness:

| [Website/Publication 1] | |
| --- | --- |
| Purpose of channel | [Example: Brand Awareness] |
| Metrics to measure success | [Example: 50,000 unique page views per month] |

| [Website/Publication 2] | |
| --- | --- |
| Purpose of channel | [Example: Brand Awareness] |
| Metrics to measure success | [Example: 50,000 unique page views per month] |

| [Social Network 1] | |
| --- | --- |
| Purpose of channel | [Example: Brand Awareness] |
| Metrics to measure success | [Example: 50,000 unique page views per month] |

| [Social Network 2] | |
| --- | --- |
| Purpose of channel | [Example: Brand Awareness] |
| Metrics to measure success | [Example: 50,000 unique page views per month] |

| Marketing Technology |
| --- |

We will utilize the following technologies and software to help us achieve our goals and objectives.

## Marketing CRM

[Name the marketing CRM you will use and briefly explain how it will be used.]

## Email Marketing Software

[Name the email marketing software you will use and briefly explain how it will be used.]

## Marketing Automation Software

[Name the marketing automation software you will use and briefly explain how it will be used.]

## Blogging Software

[Name the blogging software you will use and briefly explain how it will be used.]

## Advertising Management Software

[Name the advertising software you will use and briefly explain how it will be used.]

## Social Media Management Software

[Name the social media management software you will use and briefly explain how it will be used.]

## Video Hosting Software

[Name the video marketing software you will use and briefly explain how it will be used.]

| **Top Tip:** | Omni Online has tools to support social media management, CRM, email marketing, marketing automation to support your marketing initiatives in these areas. |
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| Marketing Plan Schedule |
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Now that you have established your marketing plan it is time to summarise it into an easy to use monthly planner to ensure you never miss a step when executing your strategy.

We have created a free template for you to use.

[**Click here to download Digital Marketing Schedule Template**](https://docs.google.com/spreadsheets/d/1HHiXaXD0nrAKITJ1FR65KxS6eBMWINGmD1NRIEccTdc/edit#gid=1745630109)

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