



# Marketing Plan Template

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At the heart of almost any interactive marketing program are the following steps. This is a good structure for planning an online campaign as well as for providing an in-depth creative brief.

## 1. Define Business Goals

Most marketing strategies aim to either increase sales or build brand to drive sales. Since marketing efforts are tailored based on the customers' relationship with the company, this translates to one of three major objectives: acquiring new customers, retaining current customers, or reactivating former customers.

While branding may also be considered an important goal, the ultimate marketing objective is always to drive sales.

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## 2. Define Your Product/Service

What product or service do you offer?

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### 3. Identify Target Markets

Who buys (or should buy) your product? Unlike mass-media offerings, interactive marketing campaigns are generally focused on specific customer segments. To aid marketing development, these groups of prospects and customers may be defined along the following dimensions:

- **Demographic traits.** These attributes are defined in terms of geographic location, age, financial resources, and so on. Solely relying on this data may cause you to overlook other characteristics that cause individuals to make different purchase tradeoffs.

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- **Psychographic characteristics.** These get at customers' interests. They include pets, political advocacy, adventure travel, and anything likely to catch prospects' attention.

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- **Behavioral actions.** These show what customers have done in the past when they interacted with your organization. This is a stronger indication of their future activities.

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#### **4. Competitors**

Who are your top competitors and what are their strengths?

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#### **5. Positioning**

Given your competition, what makes your business great and unique to customers (Value Proposition)? Why would they buy your product over the competition?

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#### **6. Pricing**

How will you price your product/service?

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#### **7. Sales and Support**

How and where will you sell and service the product?

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## 8. Promotion

- How will people find out about you and your product?

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- What kind of specific promotional campaigns will you use? (Questions to design your targeted promotional campaign are included at the end of the worksheet)

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## 9. Budget + Time Commitment

- How much money do you have to promote your product/service?

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- What time will you allocate weekly?

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- What partners, if any, will you use to promote your product/service? What is their fee?

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- What are the monthly costs associated with your marketing plan?

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# Creating a Promotion Campaign Template

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Once you've identified your company's marketing goals, you can begin to craft your promotion efforts. The offer can be described in terms of traditional marketing's 4Ps:

- **Product:**

- What's the augmented product?

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- What does the customer get in addition to the item?

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- Are there extras, such as guarantees, ongoing support, and community?

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- **Pricing:**

- How is the product or offering priced?

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- Is pricing consistent across channels? If not, is there a good reason?

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- Are there premiums or single-channel promotions?

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- **Place:**

- Where does the prospect engage with your company, promotion, or both?

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- Where is the offer made, and at what point in purchase decision process?

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- Where does the consumer buy the product?

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- What channels are used for ongoing communications, additional products, or both?

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- **Promotion:**

- Are there any incentives, time limits, quantity limits, or something similar?

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- Where is the customer in purchase process?

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- What media format is used?

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### **1. Choose a Medium**

Media depend on your business goals and should reach at the customer groups identified in the target market:

- Third-party media is used to reach new prospects. This is media you buy from sources that aggregate an audience in line with your target market. They can encompass a wide variety of formats.

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- Internal media is used to target current and past customers. You already have a means for reaching these segments, such as e-mail address, RSS feed, and postal address.

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- Social Media is used to both reach new prospects and to target current and past customers.

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**2. Develop Creative**

Creative relates to how a product or service is presented to prospects and customers. This can be broken into five different components:

- **Product benefits.** Think in terms of meeting customer needs, not product features.

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- **Media used.** Since media-format specifics influence the creative presentation, it's important to adapt to the strengths of the medium and type of advertising unit or communications piece to be used. Which media are you planning to use?

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- **Response channels.** How do customers purchase the product? Options include online, retail, phone, mail, and fax.

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- **Call to action.** What wording is used to overcome customer inertia? The aim is to get customers to act now.

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- **Branding.** How is the company's branding incorporated into the piece through the use of colors, logo, copy, and so on?



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**3. Test**

Test continually to find ways to improve your marketing results. Look for factors that will help you improve the bottom line. It's important to run tests more than once to ensure results aren't flukes. Test factors even if they haven't been important in the past, since needs can change over time. Consider that traditional direct marketers set aside up to 25 percent of their marketing budget for testing. Areas to test include:

- **Media.** Consider another media entity or format.

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- **Creative.** Change the copy, the art design, or both.

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- **Format.** Use another advertising presentation, such as a banner ad versus an e-mail.

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- **Offer.** Modify how you present the product and related pricing to customers.

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- **Target segment.** Is there another group of customers who may be interested in your product?

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- **Engagement devices.** Add or change these to increase results.

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