



## MARKETING INSIGHTS

This is a generic tool.

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# How to structure your marketing plan

## Ensuring you have the essentials

### Basics

The following need to be included in a marketing plan:

#### Situation analysis

Analysis of market, SWOT & competitors, PESTEL, 5 Forces, market forecast, market needs, market segments, customer information.

#### Marketing strategy

Mission statement, objectives for plan, market segment focus, product Positioning.

#### Sales forecast

Total month by month, sales by product, region or segment or channel, able to track monthly plan vs actual.

#### Expense budget

Enough detail to track monthly plan vs actual, also specific sales tactics and programs.

### Plan outline

The following is a typical structure.

#### 1. Executive summary

Key points from each section, completed last (for executives with limited time).

#### 2. Situation analysis

**Market analysis** with proof (primary, secondary research, surveys, focus groups).

- Market demographics (geography, demography, segments psychography, behaviours, with comment, graph)
- Market needs (what is the need, who has it, who else can fill it)
- Market trends (other than growth, what are trends)
- Market growth (in target market)
- Market segments (existing and served by product, needs and requirements, distribution channels, competitive forces, communications, keys to success).

#### Business environment analysis

- PESTEL Analysis
- Porters 5 Forces Analysis

#### Sales analysis

By product type, industry, region, client size, product value, 80/20 rule.

#### Service analysis

Marketing performance, marketing activity, financial performance, people, equipment, service capability, distribution).

#### SWOT

- Internal strengths and weaknesses
- External opportunities and threats
- Implications of SWOT

### **Competitor analysis**

By type, location, price, brand awareness, market share, growth, key strengths key weaknesses, product differentiation, service differentiation, in table form.

### **Key success factors**

### **Key vulnerabilities**

## **3. Marketing strategies**

### **Mission**

### **Marketing objectives**

What products for what segment with what benefit

### **Financial objectives**

Increase sales by %, gross margin to or by, sales by product type % of whole etc

### **Target marketing**

Strategy for each segment

### **Positioning**

For whom is product designed, what kind of product is it, what is the most important single benefit, who is the most important competitor, how is this product superior, what is the significant customer benefit?

eg. 'for the businessperson who is starting a new company, launching new products or seeking new partners, Product X is software that produces professional business plans quickly and easily. Unlike competitor Y, Products X is a stand-alone product and requires no other products to buy or learn' ie. the elevator pitch.

### **Strategy pyramids** (usually 2-3 main strategies, each with say 3 tactics, 2-3 programs each)

Strategy (key action that will cement the position)

Tactics (pricing, advertising, PR, product marketing, direct marketing, channel marketing)

Programs (how each tactic will be implemented at program level)

### **Marketing mix**

Product (unique selling proposition, branding)

Pricing (to gain sales/market share, profit or no change/stabilise)

Promotion

personal selling

offline advertising (paid print, radio, TV, billboard/signage, cinema, yellow pages, promotional gift)

online advertising (landing pages, webinars, online surveys, paid search, SEO, Google ads, banner ads, white papers, blogs)

lead generation (trade shows, breakfasts, focus groups, letter drop, samples, inserts, newsletter, personal letters, seminars, yellow pages, telemarketing)

PR (analyst briefings, journalist briefings, feature articles, HO media releases, events, media tours by visiting experts, user surveys, case studies, opinion pieces)

### **Distribution channels**

### **People**

Internal resources, responsibilities, measures

### **Market research**

#### 4. Financials, budget and forecasts

##### Break even analysis

##### Sales forecast

Sales breakdown 1  
Sales breakdown 2  
Sales breakdown 3

##### Expense forecast

Expense breakdown 1  
Expense breakdown 2  
Expense breakdown 3

##### Linking sales and expenses to strategy

##### Contribution margin

#### 5. Controls

Implementation milestones  
Marketing organisation  
Contingency planning.

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