## 

**Marketing Plan Template**

**TO USE: Save a copy to your drive   
or download to use with Microsoft Word**

**Marketing Plan for:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Your Business Name)

**1. Define Your Audience**

**Service Area:** The service area is the geographic region your small business serves. This could be a series of neighborhoods, a ZIP code, your county, or even an area code your business can reasonably serve with the time and resources you have available. If you’re an online business, your service area may be much larger. But try to be as specific as possible. My local service area includes:   
  
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**Market Demographics:** Build a profile of the people living in your service area. Include information about average household income, family size, homeownership rates, median age, and employment statistics. You’ll use this to determine whether your local service area is large enough to sustain your business, or whether you need to develop additional products or services to appeal to more of the population base. *If you serve multiple cities or regions, create a table for each one.*

| **Population** |  |
| --- | --- |
| **Number of Households** |  |
| **Median Age** |  |
| **Median Household Size** |  |
| **Median Income** |  |
| **Employment Rate** |  |
| **Average Annual Growth Rate** |  |
| **Number of Businesses** |  |

**My Customer Persona/s & Target Audience:** For your business to survive, the [customer personas](https://fitsmallbusiness.com/customer-persona-template/) you create must be represented adequately within your selected service area and its demographics. It’s likely that you’ll end up with more than one ideal customer type, or customer persona. The aggregate of your personas can then be used to describe your target audience.

| **Characteristic** | **Customer Persona Name** |
| --- | --- |
| **Age Range** |  |
| **Gender/s** |  |
| **Household Income** |  |
| **Interests** |  |
| **Education** |  |
| **Employed?** |  |
| **Professions / Job Titles** |  |
| **Pain Points** |  |
| **Goals When Purchasing a Solution** |  |
| **Messaging / Value Proposition** |  |

**Description of Target Audience:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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**2. Set Goals**

List specific, measurable goals you hope to achieve using local marketing in the coming year:

Goal 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goal 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Differentiate Yourself from Your Competitors**

**Value Proposition:** Write out your unique value proposition. Specifically, what makes your product or service different and better than the competition’s?

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**Researching the Competition:** Find out who your competition is and get to know them. Visit their websites and social media pages. Make notes about what their messages are, how they’re connecting with customers, and where their efforts are lacking. Also check out local media and see where else they’re advertising. By researching the competition, you can find market gaps that you’ll fill with your own marketing efforts.

**4. Choose the Types of Marketing You’ll Do**

Decide which marketing channels you will use to reach your target audience:

| **Online Marketing** |  |
| --- | --- |
| **Offline Marketing** |  |
| **Paid Advertising** |  |
| **PR and Community Relations** |  |

**5. Craft a Marketing Budget and Create a Marketing Calendar**

**How much should you spend?** A good rule of thumb is marketing should cost no less than 10% of gross revenues. Here is the basic formula for calculating your monthly marketing budget based on gross revenue:

Average Gross Revenue Per Month: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ x 0.10 = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

For example: if your gross annual revenue (the amount you take in before any expenses are deducted) is $120,000, your budget will be $12,000 a year.

**Create a Marketing Calendar:** You’ll be surprised how far even a small marketing budget can stretch. Use the calendar template below to allocate your budget and plan your marketing activities over the next 12 months.

[Download the Calendar Template](https://docs.google.com/spreadsheets/d/1Tk8mklWkJc3gCV7LZkr_-asNq62_IpkqK8fLo8F2kKI/edit#gid=137363788)

**8. Track Progress & Make Adjustments as Needed**

Remember the goals you set in step two? Make a checklist of those goals. Include any key performance indicators (KPIs), such as revenue targets, new customer acquisitions, and website traffic. As you reach your goals, check them off the list.

Be sure to track which ads are producing the best results, and make adjustments to optimize your campaign. If one ad is performing well, perhaps you should increase spending on that ad. If one is underperforming, maybe it needs improvement–or perhaps canceling altogether.