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<COMPANY OR PROJECT LOGO>

<COMPANY OR PROJECT NAME>

<REFERENCE>

MARKETING PLAN

VERSION <1.0>

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MARKETING PLAN

DOCUMENT CONTROL

DOCUMENT INFORMATION

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DOCUMENT APPROVALS

Role	Name	Signature	Date
Marketing Director			
Product Steering Group			

MARKETING PLAN

Procurement Manager <i>(if applicable)</i>			
Communications Manager <i>(if applicable)</i>			
Project Office Manager <i>(if applicable)</i>			

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TEMPLATE GUIDE

How to use this template

This is a guide to the common sections included in a Marketing Plan. Sections may be added, removed, or amended to suit your business or project. The example tables are just a suggestion; you can decide to format these sections differently.

Text in Blue italics is designed to help you complete the template. Before sharing your plan, delete this section and the help text in italics between <...>

Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Normal Text, font Arial, size 10.

To update the Table of Contents, right-click on it and select "Update field" and choose the option - "Update entire table".

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THE BUSINESS

<Your business name, number etc.

For example: Acme Electric Car chargers and charging services (AEC).>

WHAT OUR BUSINESS DOES

<A brief description of your what services and/or products your business provides.

For example: We provide electric car charging points at gas stations along with a customer charge card and online website for preloading the card and finding charge points.

OUR TARGET MARKET

<A brief description of your target customers.

For example: Environmentally conscious, middle- and higher-income college graduates. We expect this market to widen to include luxury car owners who are looking for a premium/aspirational vehicle over environmental concerns.>

OUR UNIQUE SELLING POINT (USP)

<For example: We were the first and are most experienced provider of charge points.>

OUR BUSINESS GOALS

<For example: To grow our coverage nationwide and to be the preferred charging point for electric car owners.>

OUR VISION

<Your vision is about what you want to achieve in the future. Ask yourself - In the long term, what do you want your business to accomplish? What are your ultimate goals? Be passionate, aspirational, and inspiring.

For example: To bring fast charging to every EV owner in the country.

Other real examples:

to organize the world's information and make it universally accessible and useful. Google 2022.

to accelerate the world's transition to sustainable energy. Tesla.>

OUR MISSION

<What does your business do? What service does it provide for your customers? Think about what you do, why you do it and how you do it.

For example: We keep our customers on the road by providing fast, reliable EV charging.

MARKETING PLAN

Other real-world examples:

to serve consumers through online and physical stores and focus on selection, price, and convenience. Amazon.

to bring the best personal computing products and support to students, educators, designers, scientists, engineers, businesspersons and consumers in over 140 countries around the world. Apple.>

PRODUCTS AND SERVICES

<Document what you are selling.

For example: Charging services for EV and Hybrid car owners.>

EXPECTED DEMAND

<What level of sales/revenue do you expect to achieve in the next year.>

SWOT ANALYSIS

<SWOT stands for Strengths, Weaknesses, Opportunities and Threats. A SWOT is a great way to analyze the current state of your business. [Download a FREE SWOT analysis template in Excel.](#)>

Strengths

<What's good about your business?

Example: We are an established brand that is well known by our target market.>

Weaknesses

<What's not so good about your business?

Example: Our chargers are only deployed in 2 cities. We need to increase our coverage to exceed our competition.>

Opportunities

<Are there any external factors that we can take advantage of?

Example: The market for electric cars is growing rapidly with premium brands bringing out all electric versions with much greater range than seen before. In consumers' minds the image of the electric car as quirky and small is being replaced. Potential customers are now seeing them as aspirational luxury vehicles.>

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Threats

<Are there any external factors that threaten our business?

Example: As the market grows so does our competition. We need to move fast to establish dominance as the best-known provider of charging points.>

ACTIONS TO ADDRESS EACH WEAKNESS AND THREAT

<Enter your plans to address each weakness and threat.

Example: Investment & advertising to increase coverage in targeted locations. Existing customer loyalty program to build customer retention. See Our Solution for more details.>

THE MARKET

MARKET RESEARCH

<Summarize your market research and attach a copy of your market research to this plan. You could add it as an appendix or create a link to the document here.>

For an overview of useful market research tools including consumer insights, location research, demand research and useful datasets see [18 Tools & Resources for Conducting Market Research](#).>

Research we've done to analyze the market.

<Example: We have created customer personas to understand the socioeconomic background and status of electric and hybrid car owners. We used a marketing segment tool to find out where electric cars are most popular and a combination of datasets including the Census Bureau to identify locations where the population align with our customer personas (they earn enough, are educated to college level and have an interest in environmental issues.>

THE PROBLEM

<What problems do your potential customers have right now? For example, is there a lack of a product or service in a particular area? Is the service difficult to access?

Example: Charging points are limited statewide. 90% of owners of full electric cars have chargers at home, but only 20% of Hybrid owners. Of the charging points that are available many are faulty and only a handful are fast chargers.>

OUR SOLUTION

<To provide AEC charging points at all gas stations in all urban areas that meet our target markets. To partner with ElecHome Inc. to market AEC charging points to Hybrid car owners.

Invest 3m to increase coverage in targeted locations. Create project team and schedule to plan and install 500 chargers in 300 locations.

Advertise new charging points aggressively using billboards, local tv and gas station signage.

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Focus on existing customers to build loyalty via a new loyalty card (project VIP in progress to deliver by March 2023).>

TARGET MARKET

<Document everyone who may want your product or service. Describe your target customer by gender, age, income, vocation, income, interests etc.>

We aim to sell our products or services to.

<For example: Our charging points are aimed at EV owners and users. They are typically over 30, with an interest in cars or the environment, are college educated and have a medium to high disposable income.>

SALES TARGETS

<How much you plan to sell over the next year. You can provide details in the [Finances section](#).>

THE COMPETITION

<Describe the businesses you are competing against. Look at the top 4/5 competitors and note what they do well and not so well. You may find the table below useful.>

Name	Strengths	Weakness	Differentiators
<ChargePts Ltd>	<fast install of charge pts>	<new provider no brand recognition >	<we are already established & have a more reliable network>

GOALS AND ACTIONS

<Document your marketing goals for the next year and three years. Try to make your goals [SMART](#).>

Learn how to set and achieve your goals using the popular SMART framework. This guide includes a free downloadable template!

GOALS FOR NEXT YEAR

<The table below may be helpful.>

Goal	Actions	Due Date	Owner

MARKETING PLAN

GOALS FOR NEXT 3 YEARS

<The table below may be helpful.>

<i>Goal</i>	<i>Actions</i>	<i>Due Date</i>	<i>Owner</i>

MARKETING STRATEGY

<This section covers the 5 'P's' of marketing – product, price, place, people and promotion. For more information see [business.gov.au marketing](https://www.business.gov.au/marketing).>

PRODUCT OR SERVICE

<Describe where your products/services fit in the market and how they are different from your competition.>

<i>Product or service</i>	<i>Description (where our products services fit in the market)</i>	<i>Unique selling point</i>
<Fast charging point>	<Growing need for on route charging points at petrol and motor way stations.>	<Our charging points are reliable, monitored and fast.>

PRICE

<Describe your price strategy and why you chose it. What is the profit margin? Does it cover direct and indirect overheads? What subscription options will be available? Will there be price tiers e.g., for higher cost for more features?>

PLACE – SALES AND DISTRIBUTION CHANNELS

MARKETING PLAN

<Describe how you will deliver your product or service to customers. For each of your sales channels describe what it is/will be used for and give details. Think about your target market when you decide on your channels. Examples of sales channels: direct mail, direct sales, export, market stall, shopfront, website, wholesale.>

Channel	Used for	Details
<Website>	<New customer sign-up and existing customer account management.>	<New customer sign-up 95%, but minimal conversion from prospect to customer.>

PEOPLE – CUSTOMER RELATIONSHIP MANAGEMENT

<Plan how you will manage relationships with your customers so that you keep them and so that they buy more of your products.

For example: Our new loyalty card program will enable existing customers to build up points leading charging discounts. New customers will be offered an upfront 10% discount for the first 3 months of their subscription.>

PEOPLE – STAFF IN SALES AND MARKETING

<List your sales and marketing staff. Include any planned roles that are not yet filled.>

Role	Name	Responsibilities
<Sales Manager>	<tb>	<Recruit and lead the sales team who will cover the new target locations and markets.>

PROMOTION

<Describe how you will promote and advertise your products and services to your customers. Focus on channels that will best reach your target market.>

Activity	Channel	Details	Estimated cost	Target date
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<Launch of new loyalty card>	<Website>	<We will advertise the card via a banner on the home page and via calls to action in my account area.>	<£500>	<End July>

PERFORMANCE METRICS

<Describe how you will monitor the success of your marketing strategy.>

Marketing activity	Date of review	Measures of impact
<Launch of loyalty card>	<ongoing monthly from launch>	<Sign-ups per week, Use of card at charge pts, Social media mentions>
<New charging points>	<ongoing weekly from launch>	<Number of charges, length of charges, use by existing customers, use by new customers.>

MARKETING PLAN

FINANCES

<Complete this section using your financial statements and forecasts.>

EXPECTED SALES

<Document your expected sales figures for the year and next year.>

MARKETING BUDGET

<Include a breakdown of your expected costs/budget. An example template for a [marketing budget](#) is shown below. Get a free copy of this [Marketing Budget Template](#).>

Marketing Budget

Department name: Created date:

Prepared by: Review date:

Marketing/promotion	January	February	March	April	May	June	July	August	September	October	November	December
Marketing agency	1049.00											
Radio advertising												
TV advertising				270.00								
Print advertising												
Online advertising												
Social media	133.00											
SEO			300.00									
Mailouts		500.00										
Giveaways												
Events												
Branding & artwork												
Merchandising												
Publications												
Catalogues												
<insert rows for more>												
Total	1182.00	500.00	300.00	270.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

MARKETING PLAN

RELATED DOCUMENTS/ATTACHMENTS

<Give the owner and location of any related documents.>

Document	Owner	Location
Balance sheet forecast	<CFO>	<Copy attached.>
Cash flow statement forecast		
Market research		
Profit & loss forecast sheets		
Staff resume/s		
RACI		

USE OF THIS TEMPLATE

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[Risk Register in Excel](#) – FREE download