

Small Business Marketing Plan Outline



1. Introduction

Aim & Statement of Business purpose

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2. External Review

Environmental Scan: P.E.S.T.L.E analysis

Political	Economic	Social
•	•	•
Technology & Science	Legal & Regulatory	Environmental
•	•	•

Market Overview

Market Structure:

Market Size and Growth:

Market Dynamics & Trends:

Major Competitors:

Competitor 1:

Competitor 2:

Competitor 3:

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3. Internal Review

Internal Scan		
Resource Levels	Skills & Competencies	Staff & Systems
•	•	•
Customer Knowledge	Previous Advertising & Promotion Results	Sales & Profit Results
•	•	•
Competitive Advantage:		

Overview Of Your Product or Service
Product or Service Description:
Product or Service Stage (in Product life Cycle): Pick one of the following: Introduction, Growth, Mature, Decline
Pricing & Profitability:

4. SWOT Analysis

Strengths	Opportunities
•	•
Weaknesses	Threats
•	•

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5. Key Issues

Key Issues	
Key Issue 1:	
Key Issue 2:	
Key Issue 3:	

6. Business & Marketing Objectives

Business Objectives	
Objective 1:	
Objective 2:	
Objective 3:	
Marketing Objectives	
Objective 1:	
Objective 2:	
Objective 3:	

7. Marketing Strategy – Product or Service

CORE Marketing Strategy: (insert product or service or company name)	
Market Segments:	Target Audiences:
Positioning Statement:	Supporting Benefits:
Market Strategy: Choose one of following Market Competitor Strategies and describe how you will achieve this in 1-2 sentences: Leader, Challenger, Follower, Niche	
CORE Marketing Strategy: (insert product or service name)	
delete this 2 nd table if unneeded or copy and paste again if more products or services	
Market Segments:	Target Audiences:
Positioning Statement:	Supporting Benefits:
Market Strategy: Choose one of following Market Competitor Strategies and describe how you will achieve this in 1-2 sentences: Leader, Challenger, Follower, Niche	

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Marketing MIX Strategy:	
Product or Service Offer/benefits:	Promotional approach:
Pricing:	Distribution/delivery:

8. Promotional & Operations Strategy

Promotional Strategy
Strategy 1: Tactics:
Strategy 2: Tactics:
Strategy 3: Tactics:
Operations Strategy
Strategy 1:
Strategy 2:
Strategy 3:

9. Action Plan

See Appendix 1 for Detailed Action Plan

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10. Promotional Budget (next FY)

ANNUAL BUDGET			
Promotional Activity Planned	Activity Details	Cost per Element	Total Cost
CORE ACTIVITIES	Brand collateral	Business Cards	
		Company brochure	
		Sub Total for Brand collateral	
	Direct Mail	Mailer	
		Postage	
		Sub Total for Direct Mail	
	Online	Website	
		Hosting	
		SEO	
		AdWords	
		Sub Total for Online	
	Direct Selling & Trade Shows		
		Sub Total for Direct Selling	
OPTIONAL	Networking/Referrals	Networking membership	
		Sub Total for Network'g /Referrals	
	Public Relations		
		Sub Total for Public Relations	
	Promotions		
		Sub Total for Promotions	
	Other		
	Sub Total for Other		
TOTAL ANNUAL Promotional Budget Spend			

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11. Monthly Promotional Spend (next FY)

See Appendix 2 for Monthly promotional spend details.

12. Marketing Measurement & ROI

Marketing MEASUREMENTS:					
Promotional Objectives:	Objective Date	Measurements:	Time Measured:	Data or Source Used:	Benchmarks:
1.					
2.					
3.					
4.					
5.					

13. Contingency Plans

Contingency Plans
Contingency Reason: Contingency Plan:
Contingency Reason: Contingency Plan:

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12. Profit & Loss Summary (next FY)

	PRIOR YR	CURRENT YR	% vs PY	PLAN YR 1	% vs PY	PLAN YR 2	% vs PY	PLAN YR 3	% vs PY
Gross Sales									
Discounts									
Net Sales									
Cost of Goods									
Gross Margin									
GM %									
Selling Expenses									
Advertising Expenses									
Stationery									
Staff Salaries									
Car & costs									
Total Mktg & Admin									
Net Profit									
NP%									

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APPENDIX 2: Budget Planner

ANNUAL BUDGET		PROMOTIONAL SPEND BY MONTH												
Promotional Activity Planned		JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
CORE ACTIVITIES	Brand collateral													
	Direct Mail													
	Online													
	Direct Selling & Trade Shows													
OPTIONAL	Networking/Referrals													
	Public Relations													
	Promotions													
	Market Research													
	Other													
PROMOTIONAL SPEND TOTALS														