

MARKETING PLAN CHECKLIST



- Write a marketing plan summary, including the following;
 - your business overview
 - market Overview
 - marketing Objectives
 - marketing Strategy

HINT! Complete your summary last, even though it comes first, that way you can use the key information from your detailed plan.

- Provide a background analysis including a snapshot of the past, current and future status of your business.
- Include an overview of your business covering the nuts and bolts of your business;
 - name, location, contact
 - vision and mission statements
 - owners, experience and structure
 - product and/or service outline
 - licence, registration and accreditation information
 - short term and long term goals

HINT! Detail your short term and long term goals in a table with the goal/objective, a description and when it will be completed.

- Do a SWOT analysis. Use a table to outline all your identified strengths, weaknesses, opportunities and threats. Then detail how and when you will address any weaknesses and threats.
- Provide an overview of the market. This is essential to help you find the most effective way to reach your target customers. Include;
 - market research and industry analysis
 - target market and customer profile - demographic and lifestyle information such as age, gender, ethnicity, location or interests and a profile to help you visualise your ideal customer
 - competitor analysis - their market share, strengths and weaknesses

HINT! Revisit this process regularly to ensure that your strategy remains relevant and targeted.

- Outline your marketing objectives, using the SMART rule. Also define your marketing mix using the 'P's of marketing; product, price, position/ place, promotion, people, process and physical environment.

HINT! Your digital marketing plan will fit in here under the promotion section, you will also need to think about branding, packaging or personal selling, PR and other offline forms of advertising and promotion.

- Detail your marketing activity plan specifying all of your marketing and promotion activity, including digital and social media activities, that you will undertake to achieve your objectives.
- Include your marketing budget and finance information
- Include a section on measurement of your activities. List each of your objectives, when and how you will monitor or review them.
- Attach supporting documents such as your resume, market research such as surveys or other financial documentation.

Note: this is a guide to a simple marketing plan only. For more details, download the marketing plan template.