

## Preparing a Marketing Plan – Checklist

Do you hear the words '*marketing plan*' and wish for the ground to swallow you up? Confused by all the jargon surrounding marketing plans? ***Fear not, we are here to help!***

[A marketing plan](#) is a document that outlines an organisations advertising and marketing efforts, for the coming year/s. It details business activities involved in accomplishing marketing objectives, within a set time.



Without marketing, potential customers may not be aware of the product or service your business is offering. Without customers, your business may meet its demise. Marketing plays a huge role in business, because planning how you are going to reach potential customers helps to ensure that people are aware of your product or service.

From describing your market and researching customers, to preparing sales forecasts and budgets, **here is our basic checklist** for what should be in your marketing plan:

- Set specific **objectives**: for example, retaining existing customers, increasing order sizes, selling new products or winning new customers.
- Describe your **market** and the characteristics/size of each market area; review key market trends.
- Research what your existing **customers value**; such as product features, quality or service.
- Compare the **distribution channels** for reaching customers (e.g. direct sales, online or through retailers).
- Profile your **competitors** and what they are offering.
- Identify other key factors influencing your business environment; carry out a **SWOT analysis** of your organisation (SWOT: strengths, weaknesses, opportunities and threats).
- Review the effectiveness of **previous marketing** initiatives such as advertising campaigns or email campaigns.
- Assess the **profitability** and sales potential of different customers and market areas.
- Decide who to **target** among both existing and potential customers. Decide which products to push and those which need updating or replacing.
- Decide how you will **price** each product or service.
- Decide how you will distribute and **sell**; plan how you can improve customer service and satisfaction.
- Plan how you will **promote** your products or services, and how you will keep in touch with customers.

- Identify customers' purchasing cycles to **timetable** marketing activities.
- **Share** your marketing plan with all team members within the organisation. With everyone on the same page, the direction of what is needed will be clear.

Please feel free to call our helpful and knowledgeable team on 01843 572600 if you would like any advice about your marketing. You can also email us at [marketing@365itsupport.co.uk](mailto:marketing@365itsupport.co.uk) – we are always happy to help and provide advice for your IT requirements, including your marketing.