2019
The Essential Step-by-Step Guide to a Successful Marketing Plan

Matrix Marketing Group
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Introduction

This document is designed to walk you through the steps required to develop an effective marketing strategy.

People are tuning out traditional, interruption-based marketing methods, and choosing when and where to interact with brands. This marketing plan will walk you through how create a digital marketing strategy with the use of digital tools like blogs, social networks, online video, e-mail marketing, webinars, podcasts, and eBooks to connect with prospects and customers in more meaningful and effective way.

The methods and suggestions in this workbook will help guide you to:

- Shorter sales cycles, larger deal sizes
- Higher close rates
- More focused resources
- Increase profitable revenue growth

And, all of these are of these improvements are achieved simultaneously.

Your primary marketing objective should be to bring in new business and maintain your current customer base. Your aim should always be towards future prospects and current customers: You want them to “raise their hands” and openly declare an interest in your company’s products and services. This approach, the “marketing for leads” approach, drives sales and should be the core strategy of your company’s marketing plan.

The marketing communications tactics used to market for leads are bottom-line oriented; they focus on generating, nurturing and qualifying sales leads. Your goal is to identify real sales opportunities that your salespeople can transform into new or incremental business for your company.

Although branding and awareness activities are important, they should be integrated with your marketing-for-leads program rather than conducted independently. You should always focus your efforts on activities that result in sales, leads or both.

This worksheet has two parts. The first part, “Where to Start,” walks you through a series of questions designed to help you determine the goals, strategies and tactics your marketing plan should include.

The second part, “How to Write Your Marketing Plan,” walks you through the steps involved in putting your written marketing plan together.

Part I: Where to Start
Before you get going let’s explore your marketing foundation. Please take a few minutes and answer these questions to give you a starting point.

1. **Marketing research:** Does your organization understand their markets and how they fit in the competitive landscape?

2. **Brand positioning:** Has your organization defined what makes them different? Are you conveying their unique value proposition (UVP) in their marketing and sales material?

3. **Buyer persona:** Before you begin your marketing plan you need to define you your target audience is. Go here for help: Click here

4. **Website development:** Is the website user-friendly with CTA, strong brand messaging, calls-to-action, landing pages, and lots of awesome content to keep people coming back?

5. **SEO:** Has your organization done a recent keyword analysis to identify the most relevant words and phrases for the website? Is the website properly optimized for search engines, including page titles, URLs, headings, image ALT text, copywriting, and meta descriptions? Has an inbound link analysis been performed? Start optimizing your on-page SEO with this template.  
Start an SEO audit >>>

6. **Copywriting:** Is your organization copywriting strong, action oriented and buyer-persona focused? Does the website or marketing collateral need to be refreshed?

7. **Social media:** Has your organization established profiles on all major social platforms? Do they have existing reach and influence online? Are they engaging with the community or simply broadcasting content? Do they have a social media policy? Are you providing training and education to employees? Get this Social Media Content Calendar>>>

**The objectives of your marketing plan are to:**

- Establish clear, measurable sales and revenue goals.
- Identify the best strategies for meeting those goals.
- Identify the tactics to be used in order to best implement the strategies for goal-attainment.

The following series of questions will help you identify the goals, strategies and tactics that will comprise your marketing plan. After you have answered these questions, you will then be prepared to create your own marketing plan, as explained in Part II of this document.

**Goals**

1. The first step is to determine your company’s goals for sales revenue in the coming year:

   a) What is your company’s minimum sales revenue goal? ____________________________

   b) What is your company’s target sales revenue goal? ____________________________

   c) What is your company’s stretch sales revenue goal? ____________________________

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2. What percentage of revenue needs to come from new business? Keep in mind the amount of new business you will need to grow to the desired level AND the amount of new business required to replace the business you will lose during the targeted period. Use the following method to calculate this figure:

   Your company’s current year’s sales revenue

   The percentage of business you expect to lose during the next year
   \[ \times \]$________

   The sales revenue from new business your company must generate during the next year just to “stay even”

   Additional sales revenue from new business needed to meet the new sales revenue goal
   \[ + $\________

   Total revenue needed from new business to meet the sales revenue goal
   \[ =$\________

   Percentage of new business that will need to come from marketing leads
   \[ \times \]$________

   Total revenue needed from marketing leads

3. What percentage of new business revenue needs to come from marketing-generated leads? For example, if your sales force typically generates 40 percent of the new business opportunities required to meet your company’s sales revenue goal, your marketing-for-leads program will need to generate the other 60 percent.

   

4. What is your company’s definition of a “qualified lead?” This should be a definition agreed upon by your company’s marketing, management and sales teams.

    

5. How many qualified leads from marketing do you need in order to meet your revenue goals?
6. How many new inquiries do you need so that you can identify enough qualified sales leads?

7. What are the specific “pains” that your products and services address? In other words, why should someone buy your solution? What business/lifestyle/everyday problem does it solve?

8. What is the “pain relief” your company is qualified to provide? In other words, how can you solve the prospect’s business problem?

9. What are your company’s competitive advantages?

To help answer this question, you can perform a SWOT analysis.

SWOT stands for: Strengths, Weaknesses, Opportunities, and Threats. SWOT analysis assists you in determining the fit between your internal capabilities and the external business environment.

**Internal:** What is the environment inside your organization like? This includes examining your company's culture, resources, skills, and operations.

**Strengths** are your company’s competitive assets and are the things your company does well. Strengths are the core competencies, skills, resources, and expertise that give your company leverage in the marketplace. Strengths are the basis of competitive advantage and should be leveraged in your strategy.

**Weaknesses** are your company’s competitive liabilities. They are the things you lack or do poorly when compared with other companies. It is important to perform an objective analysis of your internal weaknesses and prepare plans to mitigate or resolve those that could hinder
success. Remember: If you do not identify your company’s weaknesses, you cannot resolve them.

**External:** What is happening in the industry and competitive environment that may affect strategy? This analysis should include current and future conditions.

Opportunities include changes in the environment that you can capitalize on that should be included in your strategy.

Threats include changes in the environment that could put your company strategy at risk.

**Example of a SWOT Analysis:**

<table>
<thead>
<tr>
<th>Internal Strengths</th>
<th>Internal Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reputation</td>
<td>Lack of skilled staff in X areas</td>
</tr>
<tr>
<td>Market Leader</td>
<td>Lack of management experience</td>
</tr>
<tr>
<td>Financial resources</td>
<td>Weak market image</td>
</tr>
<tr>
<td>Innovation skills</td>
<td>High cost of developing &amp; providing services</td>
</tr>
<tr>
<td>Experienced management</td>
<td>Lack of financial resources</td>
</tr>
<tr>
<td>High-performing salespeople</td>
<td>Lack of reach</td>
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<tr>
<td>Customer service-focused company</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>External Opportunities</th>
<th>External Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>New markets to serve</td>
<td>Entry of lower cost competitors</td>
</tr>
<tr>
<td>Expanded product line</td>
<td>Lack of CPA partnerships</td>
</tr>
<tr>
<td>Growth of potential vertical industries</td>
<td>Increase in substitute products</td>
</tr>
<tr>
<td>Key alliance with x companies</td>
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</tbody>
</table>
Complete your own SWOT analysis for your company. You may want to consider doing this for two of your key competitors as well.

<table>
<thead>
<tr>
<th>Internal: Strengths</th>
<th>Internal: Weaknesses</th>
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</table>

<table>
<thead>
<tr>
<th>External: Opportunities</th>
<th>External: Threats</th>
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10. What are the best companies and who are the best contacts to target with regards to your lead-generation efforts?

   a) Start by ranking your current customers using three criteria: Gross revenue, Profitability and “Fit.”

<table>
<thead>
<tr>
<th>Current Customers: Gross Revenue</th>
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<tbody>
<tr>
<td>Largest:</td>
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</table>
## Current Customers: Profitability

**Most profitable:**

<table>
<thead>
<tr>
<th>Customer</th>
<th>Description</th>
<th>Profitability</th>
</tr>
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**Least profitable:**

<table>
<thead>
<tr>
<th>Customer</th>
<th>Description</th>
<th>Profitability</th>
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</table>
The fitness ranking is more subjective than the gross revenue or profitability rankings. It identifies the companies you know well, those who’s business you are most familiar with, those that are fun to work with, those that you understand best, and finally, those with who you have (or could have) a great working relationship. You might also want to check out our buyer persona: Click here

<table>
<thead>
<tr>
<th>Current Customers: Fit</th>
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<tbody>
<tr>
<td>Best fit:</td>
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<table>
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<th>Least fit:</th>
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</table>

What customers are near the top of all three rankings?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
b) Evaluate the other characteristics of the companies on this list. How large are they? Where they are geographically located? What are the titles or job functions of their top decision makers? Analyze your answers to identify common traits and then use that information to find companies with similar traits.

Start by evaluating what industries these companies represent and what products or services they buy. Are you targeting vertical markets such as real estate or construction or do you serve horizontal markets (those that cross industry lines, such as e-commerce, payroll, inventory control and CRM)?

Complete the table below by inserting the number of customers you have per product line and industry. Each column represents a vertical or horizontal market.

<table>
<thead>
<tr>
<th>Total</th>
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</table>

**Tactics**

11. Where will you find the best companies and contacts? You will need a solid marketing database to execute your marketing-for-leads programs. To obtain mailing lists that you can use to populate your database, you should identify mailing-list sources. We do not suggest buying databases. There are tools and resources to build databases that are much more accurate than a purchased list.

a) List providers:
b) Professional associations to which your target contacts belong:
________________________________________
________________________________________


c) Conferences and tradeshows they attend:
________________________________________
________________________________________
________________________________________


d) Websites they visit for professional information:
________________________________________
________________________________________
________________________________________


e) Newsletters or business publications to which they subscribe:
________________________________________
________________________________________
________________________________________


f) Social Media (e.g., Facebook, Twitter, LinkedIn, Google+, Foursquare, Yelp, etc...)
________________________________________
________________________________________
________________________________________


12. What marketing resources are available to you?

There are two categories of resources. The first is your in-house resources and includes existing marketing materials and your company’s employees. The last category is third-party resources, such as temp. firms and marketing firms. List what resources are available to you in each category.

In-house resources:
Third-party resources:

a) Marketing experts (call us if you need help 866-456-7727 or click here)

To perform the following activities:

13. What is the best way to communicate with your target companies and contacts? Check the activities you plan to use, providing descriptions where indicated:

a) Direct marketing
   - Direct mail letters
   - Direct mail postcards
   - Telemarketing
   - Fax
   - E-mail
   - Newsletter

b) Online marketing
   - Use your company’s website
     How: __________________________
   - Use third-party websites
     Which ones: ______________________
   - Search engine optimization
     What services: ______________________
   - On-page SEO
     List all keyword and long tail words: __________________________
     SEO audit >>>
   - Search engine marketing (PPC)

Click on the button below to Share!
c) Events
  - Tradeshows  
    Which shows: ______________________
  - Live seminars  
    Topics: ______________________
  - Webinars  
    Topics: ______________________
  - Speaking engagements  
    Which: ______________________

d) Print advertising  
  Which publications: ______________________
  ______________________
  ______________________

d) Social media
  - Facebook  
    Actions: ______________________
  - Twitter  
    Actions: ______________________
  - LinkedIn  
    Actions: ______________________
  - Google+  
    Actions: ______________________
  - YouTube  
    Actions: ______________________
  - Yelp  
    Actions: ______________________
  - Foursquare  
    Actions: ______________________
  - Other  
    Actions: ______________________

14. What offers will you use to obtain inquiries from these companies and contacts? To appeal to prospects at various stages of the buying process, you should use multiple offers in your marketing-for-leads programs. Check those you intend to use and then describe.

  - How-to guides  
    Subject(s): ______________________
  - Buying guide  
    What Products/services: ______________________
  - White papers  
    Subject(s): ______________________
  - Information kits  
    Contents: ______________________
  - Live demos
What products/services:

- Invitations to events
  Format and subject matter:
- eBooks
  Format and subject matter:
- Podcasts
  Format and subject matter:
- Blog Posts
  Format and subject matter: (use Google calendars for this)
- Case studies
  Format and subject matter:
- Videos
  Format and subject matter:
- Infographics
  Format and subject matter:
- Other:

15. How will you identify qualified sales leads? Create your direct marketing response forms with questions that elicit the information you need to determine if the respondent fits your definition of a qualified lead, as articulated in Step 4. Make sure all your response channels ask the same qualifying questions which may include variations on the following:

- Does the prospect have a need or a purpose for your product or service?
- Does the prospect have an established project currently in play?
- What is the status of the prospect’s budget?
- What is the size of the opportunity?
- Does the prospect plan to purchase within a reasonable amount of time? Matrix Marketing Group considers an average anywhere from 5 minutes to 120 days for a reasonable time frame for purchase depending on the product or service. After that too many thing change.
- What is the prospect’s role in the decision-making process?
- Does the prospect have negotiated access to power? In other words, can he/she get you in front of the appropriate decision maker when the time is right?

16. What types of relationship marketing techniques will you use to move your “not-yet-qualified” leads through the sales cycle? This requires keeping in touch with prospects on a regular basis. Check those you intend to use and then describe.
Sales Tools

17. What sales tools will you develop to help your salespeople sell? The goal is to help your sales team better articulate to the prospect the advantages of selecting your company rather than a competitor—as well as propose and close sales. Check those you intend to use and then describe.

- PowerPoint presentations
  - Content: ______________
- Key issues and war stories ([Learn more here>>>])
  - Content: ______________
- Online demonstrations
  - Product: ______________
- Leave-behinds (e.g., brochures, advertising specialties)
  - Which ones: ______________
- Templates (e.g., thank-you letter, sales-proposal document)
  - Which ones: ______________
- Case studies
  - Which ones: ______________
- Reference stories
  - Which ones: ______________
- Videos / Multimedia
  - Which ones: ______________

Metrics

18. How will you determine the effectiveness of your marketing programs?

Be sure to setup your metrics. Here’s a sample list.
- Inbound leads
- Website traffic
- Bounce rate
- MQL (marketing quality lead)
• SQL (sales quality lead)
• Cost per lead
• Blog comments
• Content downloads
• Media placements
• Speaking engagements
• Lead sources
• Cost of customer acquisition (COCA)
• PPC return
• New customers
• Social media reach
• Social media reputation

Get the 6 Marketing Metrics A CEO Cares About>>>

a) How will you measure inquiries generated?

________________________________________________________________________
________________________________________________________________________

b) How will you measure sales leads identified?

________________________________________________________________________
________________________________________________________________________

________________________________________________________________________


c) How will you measure ROI of the marketing-for-leads program?

________________________________________________________________________
________________________________________________________________________


d) How will you track the source of your inquiries or leads? Check those you intend to use.

- Special e-mail addresses
- Unique URLs
- Codes on reply cards, coupons, labels, etc.
- Unique product numbers in your catalogs
- Extension numbers in your phone numbers
- Department codes or mail stops in your company's addresses
- Reports from your CRM or inquiry-handling software

Click on the button below to Share!
19. How will you communicate the results of your marketing programs to management? In addition to reporting to senior management on the results of your marketing programs, how will you make your managers aware of all the marketing tasks you are working on?

________________________________________________

Ask us about our Marketing Metrics template. It will save you a lot of time. If you don’t have an automated system to track your marketing and analytic data have someone write API’s into this template. It’s a time saver and being data-driven will increase your marketing performance.

Budget

20. How much funding will you need?

For blank-page budgeting, write down or create a simple spreadsheet of all the activities you selected in Step 13, listing the costs associated with each. Include human resources (in-house or third-party), materials, postage, printing, lists, rentals, and transportation. Do the calculation three times, based on the minimum, target and stretch goals you wrote down in Step 1.

Budget to meet minimum goal = $________________
Budget to meet target goal = $________________
Budget to meet stretch goal = $________________

Use this planning template as well>>>
created in Step 21, create a sub-sheet for each marketing program that includes every step required to create, launch and track the program. The sub-sheet should indicate who owns each step and include due dates for each task.

23. Communicate to the sales team about your lead-generation campaigns so that they can do their part when the leads start coming in. Provide your salespeople with details such as:

- How many leads you expect the campaign to generate.
- When the campaign will reach its goals.
- When they will need to follow-up on the leads.
- What codes to use when entering orders.
- The campaign’s offers.

24. Talk to us about marketing automation software to help you with tracking campaigns and automating many of these marketing activities.

Learn about the benefits your business can achieve by applying an outsourced strategy for your marketing needs. Get it here>>>
Part II: How to Write Your Marketing Plan

Now that you have completed Part I, you have all the information you need to write your marketing plan. In Part II, we will address your marketing plan's format and contents.

Format

In general, the format of your marketing plan isn’t important. Typical formats range from a simple PowerPoint presentation to an elaborate Microsoft Word document with numerous graphics and attached Excel spreadsheets. Don't like Microsoft try Google Docs.

As a general rule, if you will be using your marketing plan to raise funds from bankers or investors, it should be more detailed. However, if it is to be used as a working document internally, simple is usually better.

Every business is different; therefore, the look, feel and contents of every marketing plan are different.

Follow the instructions below to create your written marketing plan.

Contents

A typical marketing plan contains the following sections, in this order:

- Executive summary
- Mission statement
- Situation analysis
- Goals
- Marketing strategies
- Marketing communications tactics
- Resource and budget requirements
- Implementation plan
- Exhibits

Let us examine what to include in each section.

Executive Summary

The Executive Summary is a summary of key points. In this section, you will distill all the information from your marketing plan into a one-page overview.

Although the Executive Summary will appear at the beginning of your marketing plan, be sure to write it last.
Mission Statement

The Mission Statement expresses the overall objective of your marketing plan. Here is an example:

“The mission of this marketing plan is to identify the best marketing strategies and tactics to increase our company’s sales revenue 25 percent in the next 12 months.”

Situation Analysis

The Situation Analysis section describes the current situation of your company. This includes the conditions of the competitive, economic and regulatory environments. Use the results of your SWOT analysis and the SWOT analyses of competitors to flesh out this section. (See Part I, Step 9.) The results of the SWOT analyses can be useful in determining the gap between your current strengths/weaknesses and the required or acceptable strengths/weaknesses. In the Situation Analysis section, you may also review past marketing activities, define the range of products you are marketing, and address changes in the customer base (i.e., a major merger or acquisition).

Goals

In this section, you will use the information from Part I, Step 1 to describe the three levels of goals you are targeting with your program:

- Minimum Goal
- Target Goal
- Stretch Goal

Explain in the Goals section the relationship between the marketing plan’s three goal levels and the corporate goals you discovered when interviewing your senior managers. You may also include in this section:

- Percentage of revenue that needs to come from new business. (See Part I, Step 2).
- Percentage of new business revenue that needs to come from marketing-generated leads. (See Part I, Step 3).
- Definition of a qualified lead. (See Part I, Step 4).
- Number of qualified leads from marketing that you need in order to reach goals. (See Part I, Step 5).
- Number of new inquires you need so you can identify enough qualified leads. (See Part I, Step 6.)

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Marketing Strategies

This section explains the strategies you developed to meet the goals articulated in the previous section. Here, you should discuss the pains your products and services address (Part I, Step 7) as well as the pain relief they provide (Part I, Step 8). In the Marketing Strategies section, you should identify the companies, contacts, and vertical or horizontal markets you identified as the best targets for your marketing programs (Part I, Step 10).

Marketing Communications Tactics

Use the Marketing Communications Tactics section to explain how you will communicate with your target audiences. Specifically, you should describe the following:

- List sources. (See Part I, Step 11.)
- Communications media. (See Part I, Step 13.)
- Offers. (See Part I, Step 14.)
- Response form. (See Part I, Step 15.)
- Relationship marketing techniques. (See Part I, Step 16.)
- Sales tools. (See Part I, Step 17.)

Check this messaging and positioning guide for help: Go here.

Resource and Budget Requirements

In this section, describe the human and program resources available to you, as well as additional resources you will need to put your tactics in motion. Include in-house and third-party. (See Part I, Step 12.) In addition, describe any skill development that will need to occur, such as technical or vertical-market training.

Also include in this section:

- Your budget requirements, with a budget figure corresponding to each of the three goal levels identified in the Goals section. (See Part I, Step 20).
- How you intend to measure the effectiveness of your marketing programs. (See Part I, Step 18).
- How you will communicate the results of your programs to management. (See Part I, Step 19).

Implementation Plan

The Implementation Plan section should include a proposed schedule of marketing activities as well as an indication of who will be responsible for which activities. (See Part I, Steps 21-22). In addition, explain how you intend to communicate with the sales team about your marketing programs. (See Part I, Step 23).
Exhibits

The Exhibits section of your marketing plan includes any auxiliary items that support your plan and its objectives. Here are some examples:

- Spreadsheets of budget and calendar information.
- Information on tradeshows you are considering attending.
- Samples of your competitors’ ads or other marketing materials.
- Samples of your own brochures and other marketing materials that need to be updated.
- A survey of your salespeople that shows what kinds of sales tools and/or marketing programs they need to be more effective in the field.

Summary

If you follow the steps outlined in this worksheet, you’ll find that your marketing plan almost writes itself! Next year it will be an even easier task since you can simply update this year’s plan, making necessary changes or additions to bring it up-to-date. Please send us your questions and we’ll be walk you through the details.

Want to know where you stand to start with a FREE online audit click here.

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