

MẪU KẾ HOẠCH MARKETING

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Marketing Plan template by Charles Sturt University

Part one

1. Executive Summary
2. Market Overview
 - Customer information
 - Market information
 - Industry information
 - Product information
3. SWOT and issue analysis

Part two (to be completed in conjunction with marketing)

4. Marketing Objectives
5. Controls and Evaluation
6. Budget Determination
7. Action Plans

1.0 Executive Summary

- 1.1 What are the reasons or general aims of developing this strategy
- 1.2 What is the conclusion of this plan (to be completed after development)

2.0 Market Overview

2.1 Customer information

- Who are you targeting? Describe the person(s) you want to reach and their role in the decision process. (What useful demographic information is available to assist in locating and reaching this person?)
 - Where do they live/work/operate?
 - Define any distinct market/sector groups?
 - What is this market/sector looking for?
 - What are their basic needs?
 - What stimulates their decision? (Cost? Quality? Environment? staff?)
 - Who are their reference groups? (What other influences are there?)

2.2 Market information

- What is the market/sector size? (nature and extent of demand)
- Who are your identified competitors (alternative providers)? How are they better/worse/different?

- What is our market share and the share for each participant? Is market share relevant? (Please include rationale)
- What are past and predicted trends in market?

2.3 Industry information

(Describe any factors relating to the course area/ industry)

- Is the relevant Industry/Profession/vocation/interest group growing?
- Are there any rules, regulations, acts or restrictions that affect the industry?
- Are there any conflicts in needs or wants between significant industry and other stakeholder groups?

2.4 Product information

- Describe the course(s) and the major selling points and/or issues
- In one sentence, what is the single most important thing about your course(s)
- How do people think/feel about the product now?
- How do we want them to think/act/feel?
- How is it currently promoted?

3.0 SWOT and issue analysis

- What are the product strengths?
- What are the product's weaknesses?
- What opportunities do you see for the product?
- What threatens your product?

What are the key issues arising from SWOT that must be addressed in this plan? What strategic questions and information need areas remain unresolved?

Part Two

(This section will be developed in conjunction with marketing)

4.0 Marketing Objectives and Strategy

This is a series of objectives decided upon to meet agreed marketing objectives and goals reflected in the aim of the strategy outlined in the executive summary, based on the information provided. Ideally you should be able to identify one primary objective and two secondary (all measurable).

5.0 Controls and Evaluation

5.1 How will success in meeting marketing (or sector) objectives outlined in this plan be monitored?

This is an agreed series of goals that are considered achievable and measurable indicators of the overall marketing effort.

5.2 How will the contribution made by promotional and communications effort in the achievement of marketing objectives be measured or ascertained?

This is an agreed series of goals that are considered achievable and measurable indicators of the contribution and effectiveness of promotional and communications effort in the achievement of specified marketing and sector objectives in this plan.

6.0 Budget determination

What is the size and source of budget allocation for this plan and how was this determined?

7.0 Action Plans

This is a series of promotional and communications programs to meet the objectives. These are broken down into a series of tasks which are allocated to individuals and given completion dates. They also include costs and indicators of achievement.

MARKETING PLAN TEMPLATE

by Factiva, Dow Jones & Reuters

I. Executive Summary

The Executive Summary highlights the main goals and recommendations of the marketing plan. It should also briefly address budget requirements and how success will be measured.

II. Business Overview

This section is sometime referred to as the Situation Analysis segment. In a typical marketing plan, it contains relevant background on the market, product, pricing, and distribution situations as well as on competitors. Information Centers can describe their business in these terms as well. Assuming the planning process takes place at the end of a fiscal year, this section may be a recap of the business for the past 12 months. Consider describing your customer base, services required by your customers, and environmental factors affecting your operation. Yes, Information Centers have competition. How has the Internet affected your business? Are other departments loading content for their use? Include any hard or anecdotal data on ROI available to you, as well as information on the Information Center's impact on the business.

Some marketing plan templates include the SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis in this segment. Others insert a separate segment devoted to the SWOT Analysis. In the light of the business situation just described, you must now reflect on strengths and weaknesses of your operation, as well as opportunities and threats to be dealt with in the coming year.

III. Target Market

How well do you know your target market? How well do you understand their information needs? Can you articulate what your customers and potential customers need as opposed to what you offer? Are there groups to whom you should be "selling" who are not now "buying" your services? Are there ways to segment your market so that you can offer highly specialized products and services to various groups, reflecting their business priorities? What kind of products should be offered to a broad base of users? Answering these questions will help you define your target market.

IV. Goals

What do you want to achieve? The goal statement(s) should be challenging and yet, attainable. Is it important to increase the number of departments served? Which departments? Do you intend to provide more training programs? Sample goal statements might read:

1. Establish relationship with Legal and Regulatory Departments in first quarter.
2. Reduce staff time spent on call-in, ad hoc requests for help with Internet searching

V. Marketing Strategies

Here strategies and programs are outlined which will help us reach the goals outlined above. For the two goals suggested previously, strategies might read as follows:

1. Provide daily news delivery for all persons in Legal and Regulatory Departments on trial basis for 2 weeks as first step in increasing business with these departments.
2. Increase the number of Internet training sessions by 10% over the course of the year.

VI. Implementation Tactics

Tasks required to implement and monitor each strategy are listed in this section. With each task, the person responsible for the task, and a completion target date are indicated. Having a plan of action with specific tasks ensures that the details are clear and that specific persons are accountable. For example:

1. Daily news delivery trial for Legal & Regulatory Departments

Task	Description	Person Responsible	Completion Date
a)	Meet with Department Directors to promote plan, including budget implications for departments following trial.	M.L.	1/15
b)	Meet with vendor to set up trial.	J.V.	1/15
c)	Work with vendor and designates from each department to define profiles.	M.L., J.V.	1/22
d)	Schedule meeting with all members of both departments to promote trial; sell concept of customization following 2-week trial.	M.L.	1/30
e)	Launch trial.	All	2/1
f)	Schedule mid-trial meeting for feedback and refinements.	J.V.	2/8
g)	Assess trial results.	M.L., J.V.	2/15
h)	Launch customized news delivery to groups.	J.V.	2/18
i)	Review on quarterly basis.	M.L., J.V.	4/1,7/1,10/1

2. Increase the number of Internet training sessions by 10% over the course of the year.

Task	Description	Person Responsible	Completion Date
a)	Review most frequent requests for help with Internet and determine appropriate applications for classes.	D.H.	1/15
b)	Contact Consultant to design course on government sites	D.H.	1/20
c)	Review course proposed by consultant and set targets for testing.	M.L., D.H.	1/30
d)	Trial run of course with Information Center staff.	D.H.	2/20
e)	Schedule and promote course for organization	D.H.	3/1
f)	Review and modify, if needed, based on evaluations.	D.H., Cons.	3/15

VII. Budget

How much will the activities defined above cost? Can you provide a revenue forecast? Explain the assumptions on which the forecast is based and consider various (best case, worst case) scenarios. Since many Information Centers now operate as cost centers, if not profit centers, this component of the plan is extremely important.

VIII. Evaluation of Results

What are the success criteria? How will you measure success of the plan? By monitoring progress, you can judge the success of the marketing plan. If some of the strategies are not working out, try to determine why. Is the strategy flawed? Is there a problem with implementation or timing? How can you refocus and move on?

MARKETING PLAN TEMPLATE

by Brett Pearce¹

One of the toughest marketing assignments is to write a marketing plan that is ambitious yet still attainable. By following the guide and using the template below, anyone will be able to write a top rate marketing plan.

Before starting on your written plan, you should answer the following questions:

1. What is the product or service you are selling?

2. Who is your market that will buy the product or service?

3. What need does the above market have for your product or service?

4. What is the basic message that you would like to send to this market in regards to your product?

5. What is the best way of getting in contact with your projected market? (i.e.- T.V, Radio, Print, Online)

After answering the above questions you will ready to start on your marketing plan. When answering question 5 keep in mind your budget limitations as you do not want to set yourself up for committing too much money to advertising.

Follow the template below using your answers to the above questions to guide you through.

Executive Summary

The following section can be taken straight from the business plan or it can be newly written for the marketing plan. Below is a suggested list of things to be included.

IX. Description of the Company

The description of the company should include a brief summary of the company including when it was founded and some general details about your company. It should not be more than about 10 lines and should not go into too much detail about the companies mission or products and services as this comes later in the Executive Summary.

X. Mission Statement

¹ Content Developer and the Australian Community Director for zeromillion.com

This should not be anything new and should be taken directly from the Business Plan. Most companies have mission statements from day one and this should be included on all marketing plans.

XI. Products and Services

The information in this category could vary depending on the purpose of the plan. If this is a company wide marketing plan then all products and services should be listed briefly giving a good description of what each of them can provide. If this marketing plan were specific to a product, then a description in more detail would better suit the marketing plan.

XII. Financial Feasibility

This section should also come straight from the business plan and give a brief description of the financial outlook of the company and what effects may arise if the marketing is not successful. You should not discuss financial plans for the marketing program in this section of the document.

Strategic Focus and Plan

XIII. Mission/ Vision

Not to be confused with the Company Mission, this statement is what you would like to get out of the marketing plan. If this is a marketing plan for a single product, then this statement should state what your company expects out of the product and they plan to achieve this.

XIV. Objectives

The objectives of the marketing for the particular product, service or company should be outlined in this section. If one of the objectives is to make 2,000 people aware of your new product then this is something that should be included in your objectives. You can also include company objectives in this section if they are directly affected by your marketing. For instance, if your company is looking for it's first million dollars in sales, then this is an objective that comes in direct contact with the marketing program.

XV. Competitive Environment

Here is where you need to outline the competitive environment of your market. This would include any competitors whether it is direct competition or indirect competition.

XVI. Situation Analysis

There are two effective marketing tools that can be used in a situation analysis purpose. The SWOT analysis and the BCG Dot Matrix. (Please refer to article on Effective marketing tools for beginners if you are unsure about these two tools).

For an in-depth analysis include both the SWOT Analysis and the BCG Dot Matrix in the Situation analysis. These diagrams can compare your products to your competitors and help you to determine the best approach for winning your section of the market.

XVII. Competitive Analysis

This section differs from the competitive environment as it describes more in-depth how you plan to effectively market against the competition. This section should outline direct competition's weaknesses and how you plan to capitalize on these weaknesses to grab the market share.

Market Product Focus

XVIII.

XIX. Marketing Objectives

These objectives can work in two different ways depending on what type of marketing plan you are writing. If you are writing a company wide marketing plan, then this section would outline all of the objectives you wish to attain through your marketing program. They should be listed in a number format along with a detailed description of how you wish to accomplish these objectives.

If the plan were being created on an individual product/service basis then the marketing objectives would be what the company expects to gain from this product/service. Once again, objectives should be listed in a number format with a detailed description of how this products/services marketing will tie in with the marketing of the program and how this will be accomplished.

XX.

XXI. Target Markets

This section will define in detail the market in which you will be marketing your product. It should be described in detail, and should outline how you come to the conclusion that this is the right market for your product/service. You should also state why this market is going to use your product and show what research has been conducted to come to this conclusion.

Marketing Program

XXII. Product Strategy

The product strategy should give a detailed description of what your product(s) are and how they are going to benefit your company. You describe which products you think will be most popular and describe which ones you want to be the most popular (The BCG Dot Matrix is very good in helping you determine this). If you are doing an individual product marketing plan, then this section would describe in detail what your product is and what strategies you have to make it beat out your competitors.

XXIII. Price Strategy

The price strategy is where you will describe your key pricing issues. It is a good idea to state whether you are taking the high cost-low turnover method or the low cost/high turnover method. If you think your key selling point is going to be the price, then explain that here. If you are taking the low cost/high turnover approach then explain how your company will succeed with the low profit-margin on each product. Be sure to include rough estimates of profit-margins, manufacturing costs and end consumer prices.

XXIV. Promotion Strategy

The promotion strategy is one of the most important sections of the marketing plan. This is where it can make or break a marketing program. This section should include advertising strategies you plan to engage in, any marketing strategies for your products such as attending trade shows, conferences etc. Also you should explain what message you want to promote in all of the items mentioned above. You should send the same message through all channels of communication.

Just Do It

Now that you have your plan, go out and make it real. There is no use spending months in analysis paralysis trying to write a perfect plan. Rather, have a bias towards action and go get started NOW.