

Marketing Plan

Date / Company



Marketing & Communications

This marketing strategy and planning template can be used for company level or product level work

1. Strategy

- Mission, Vision & values
- Market and competition analysis
- Positioning
- Key value propositions and unique selling points
- Target audiences
- Core messaging for marketing

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2. Planning

- Budgeting
- Goals
- Main messaging
- Channel plans
- Content strategy and plan
- PR plan (separate template)
- Sales support
- Marketing & communications calendar
- Customer journey mapping
- Tools & tracking plan
- Resourcing, responsibilities and timeline
- Reporting plan

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3. Execution

- Set up and building work
 - Website
 - Channels
 - Materials
 - Tracking and tools
 - Reporting
- Marketing & campaign management

Strategy

- Company or product level Mission, Vision & values
- Market and competition analysis
- Positioning
- Key value propositions and unique selling points
- Target audiences
 - Company profiles
 - Buyer personas
- Core messaging for marketing
 - Taglines
 - Descriptive sentences
 - Themes, topics & discussion points
 - Barriers to adoption messaging
 - Terminology, keywords, hashtags

Vision and Mission - business or product

Your vision is where you want to take your business to - what is your long term business purpose and goal. Your mission statement is your promise to your customers and how you make a difference in their everyday lives. [San Francisco's WHY Discovery workshop](#) will help you determine your mission if you have not crystallized it yet.

Vision statement

E.g. "Our vision is to be earth's most customer-centric company; to build a place where people can come to find and discover anything they might want to buy online"

Mission statement

E.g. "We strive to offer our customers the lowest possible prices, the best available selection, and the utmost convenience"

OKRs (Objectives and Key Results)

Market and competitor analysis

The better you know your market and competition, the better you can position yourself and stand out. A little research goes a long way. If you have collected data of any kind, make use of it. From marketing perspective, the bare minimum is to know how your competitors have positioned themselves and what is their messaging like.

Competitor	Positioning	Messaging
Company x	Cheap product for starters	Taglines & statements
Company y	Enterprise market leader	
Company z		
Company Ä		

Market information and targeting

Positioning

Positioning among direct competitors or close alternatives. Look for differentiating factors in current market / product situation, rather than future vision. Try different values to find new viewpoints

On demand		
Prebook		
	Affordable	Expensive

Positioning statement

E.g. Brice Co. provides Men ages 24 -35 with lower prices on sporting goods than any other sporting goods store. We do this by eliminating overhead, forming strategic partnerships with major brands, and matching any other price on the web.

Value proposition canvas

Use value proposition canvas for brainstorming unique value propositions, key selling points and key differentiators.



KVP's & USP's

Based on the positioning & value proposition canvas exercises, list your key value propositions and / or unique selling points here. They can be company level or product level, and will be used when deciding on main messaging for marketing campaigns. You can list as many as you like, but try to prioritize.

Key value propositions & unique selling points
<i>Affordable price</i>
<i>Ease of use</i>
<i>Time saver</i>

Target audiences – B2B

Describe your target company profiles and buyer personas

Company profile 1	Company profile 2	Company profile 3
<ul style="list-style-type: none">- Industry- Size- Location- Other characteristics		
Buyer persona 1	Buyer persona 2	Buyer persona 3
<ul style="list-style-type: none">- Industry- Size- Location- Other characteristics		

Taglines and descriptions

Descriptive sentences tell customers what you do and to whom in one or two sentences. Have at least one descriptive sentence. If you have several target audiences (for example end customers + partners), you can have one for all. Taglines are slogan-like punchlines. For new businesses and products descriptive taglines work better than traditional slogans. As a reference, you can think about what you would put into the header of your website for example.

Taglines

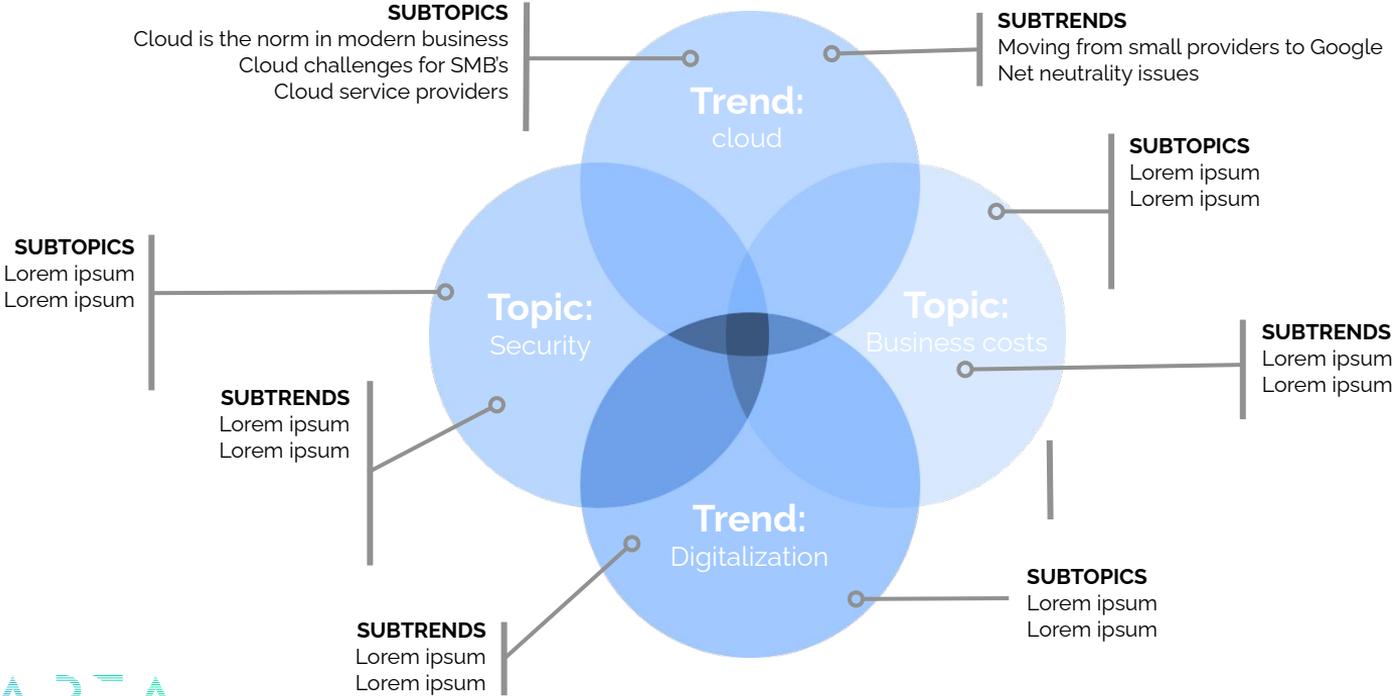
Set a trend!

Descriptive sentences

Premium health tracker for trendsetters

Trends, topics and discussion points

Look at your positioning, target customer profiles, current trends that support your business case and customer benefits. List trends, topics and discussion points based on them here.



Barriers to adoption

Barriers to adoption are important to recognise so marketing can lower the threshold for customers to try or buy your product or service.

Barriers for adoption	Tactics for lowering the barrier	Activities
High price	<ul style="list-style-type: none">- Communicate quality- Communicate exceptional service	<ul style="list-style-type: none">- Communicate service and quality in marketing- Do a customer satisfaction survey and use positive results as marketing material
Uncertainty of "will it work"	<ul style="list-style-type: none">- Communicate customer short stories with positive experiences	<ul style="list-style-type: none">- Create short customer stories and post regularly on social media and blog

Terminology, keywords and hashtags

It is important to decide and lock your terminology, so that your messaging is consistent and you are able to “own” your category. If you are creating a new category altogether, you need to define and create your terminology.

Terminology	Keywords	Hashtags
What we call ourselves? What we call our service? What is our industry or business area?	What are the keywords that you think are relevant to your service or product or related trends & topics	Define your main hashtags to go with your marketing. Try to come up with both: popular hashtags and hashtags that are unique to you

Planning

- Budgeting
- Goals
- Main messaging
- Channel plans
- Content strategy and plan
- PR plan (separate template)
- Customer journey mapping
- Marketing & communications calendar
- Tools & tracking plan
- Resourcing, responsibilities and timeline
- Reporting plan

Customer journey mapping

Map your customer paths step by step. Customer paths map will help you focus and achieve your goals and make sure you don't create "broken links" that keep people from getting to where you want them to go. While mapping paths you'll get a list of bits and pieces you need to create, fix and set up in order to run your marketing and get the right data of results.. Mind mapping tools are good for journey mapping. Post-its on the wall work as well. Here is an example of a possible path map on sheet for a single piece of content:

Sees a published story in online media

Step 1	Step 2	Step 3	Goals in priority order	Tasks
Search company on google	Click organic link to website	Starts a free trial		Add free trial -call to action and button to home page header and make sure the path from button to sign-up works well. implement tracking and reporting for the path
		Gets in touch		Add Get in touch call to action and button to front page, add contact details automatically to CRM and newsletter lists
		Reads case studies		Add case studies to website, and a link to case studies to home page
		Orders newsletter		Add Newsletter ordering to website, automatically add to lead lists
	Click a search ad	Starts a free trial		Build SEM campaigns that direct traffic to Start a free trial -landing page
		Gets in touch		Add to SEM campaigns as a sitelink
		Reads case studies		Add to SEM campaigns as a sitelink
		Orders newsletter		as above

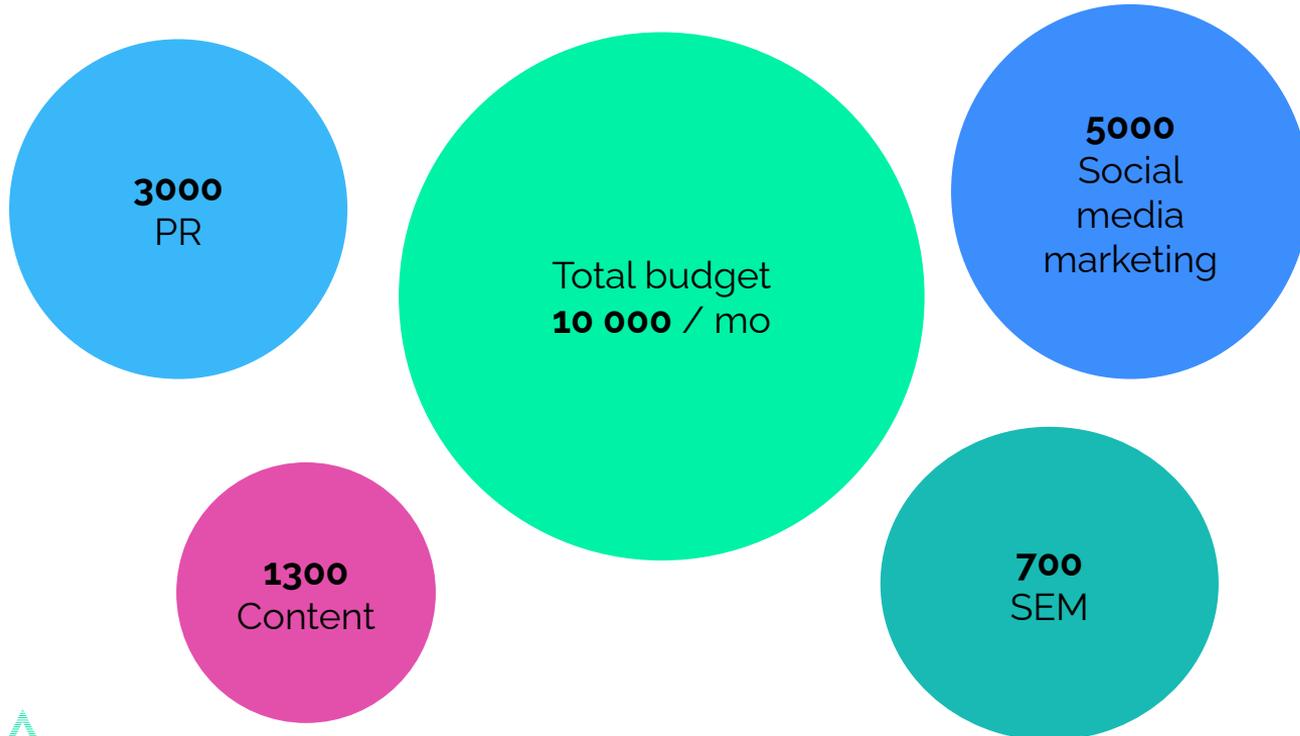
Goals

What is the purpose of our marketing and communications efforts. What is the priority order.

Marketing and communications high level goals	
1	Awareness
2	Leads
3	Customer acquisition
4	
5	
6	

Budgeting

Decide how you want to share your marketing budget. Focus is the key here.
Rather than doing a bit of everything, do a few things well.



Main marketing messaging

Decide on the main messages you want to get to the market. These are not slogans or ad texts, just descriptions on what you want to get across. Keep it simple and focus.

Marketing Messaging	
Hashtags and keywords	

Digital channel overall plan

What are the main channels and tactics you want to utilize in order to reach your audience. What are the main customer touch points? Draft a description

Channel & tactics options to choose from:

SEM

SEO

Social media:

1. Facebook
2. Instagram
3. Twitter
4. LinkedIn

Email

Display & video advertising

Content marketing

Sales support

Channel Strategy

Main channels in our marketing will be Social media and SEM. Main focus will be on LinkedIn. Other channels will run on minimal effort.

We will run occasional display and social media advertising campaigns. Email marketing will be utilized with the campaigns.

Content marketing can be used in a campaign-like manner.

Our main digital customer touch points will be: LinkedIn, display and social media ads and newsletter

SEM

Write down a rough plan for SEM management

<i>Overall channel plan:</i>	Goal: to reach person x in a situation y. and rise awareness	How: Set up, run and optimize adwords account with relevant keywords. Use wide set of keywords in order to get visibility
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Budget	<ol style="list-style-type: none">1. Monthly budget2. Daily budget
Keyword areas	SMB IT, Cloud computing,...
Channel audit	No SEM running at the moment, starting from scratch
Resourcing	SEM account will be managed by partner xyz

SEO

Write down a rough plan for SEO management

<i>Overall channel plan:</i>	What: Gain continuous good visibility and findability for company web properties	How: Ongoing SEO management, development and domain authority improvement
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Full SEO audit and analysis	Auditing your current SEO status and needs for improvement
on -page SEO optimization	Fixing SEO errors and making SEO supporting improvements
Technical SEO	Improving code-level SEO
Link building	Strengthening website's domain authority and building trust within Google to improve visibility

Facebook

Have an overall plan for post types, frequencies and materials / work needed in order to execute goal supporting marketing on Facebook

<i>Overall channel plan:</i>	Goal: Facebook is used mainly as a customer service channel and advertising channel	How: Reply to messages fast, make additional posts 2-3 times/week, run advertising campaign once a month
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Post types	<ol style="list-style-type: none">1. Post customer service information and notifications2. Post frequently asked questions that help explain something or emphasise the value of our product3. Share some suitable content from other channels
Frequency	2-3 times per week
Materials	No additional materials needed. Use existing and what is created to other channels
Channel audit	Facebook channel visuals and messaging need to updated to match with strategy
Resourcing	Company will run Facebook account inhouse, apart from advertising campaigns

Instagram

Have an overall plan for post types, frequencies and materials / work needed in order to execute goal supporting marketing on Instagram

<i>Overall channel plan:</i>	Goal: Instagram is mainly used as an advertising channel	How:
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Post types	<ol style="list-style-type: none">1. Post customer service information and notifications2. Post frequently asked questions that help explain something or emphasise the value of our product3. Share some suitable content from other channels
Frequency	2-3 times per week
Materials	No additional materials needed. Use existing and what is created to other channels
Channel audit	Instagram channel visuals and messaging need to updated to match with strategy
Resourcing	Inhouse management apart from advertising campaigns

Twitter

Have an overall plan for post types, frequencies and materials / work needed in order to execute goal supporting marketing on Twitter

<i>Overall channel plan:</i>	Goal:	How:
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Post types	<ol style="list-style-type: none">1. Post customer service information and notifications2. Post frequently asked questions that help explain something or emphasise the value of our product3. Share some suitable content from other channels
Frequency	2-3 times per week
Materials	No additional materials needed. Use existing and what is created to other channels
Channel audit	Twitter channel visuals and messaging need to updated to match with strategy
Resourcing	Inhouse management apart from advertising campaigns

Linkedin

Have an overall plan for post types, frequencies and materials / work needed in order to execute goal supporting marketing on LinkedIn

<i>Overall channel plan:</i>	Goal:	How: We will make and boost company posts, as well as planned and well defined posts from key people's personal accounts.
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Post types	<ol style="list-style-type: none">1. Short personal account posts on relevant topics and trends (that are..)2. Share blog posts and articles3. Share new customers won4. Share case studies
Frequency	2 times per week
Materials	Image content and text copy needed. Blog posts and articles.
Channel audit	Linkedin channel visuals and messaging need to updated to match with strategy
Resourcing	Linkedin will be managed in co-operation with... (write down clear description on who does what)

Email marketing

Have an overall plan for different email marketing tactics

Target audience	Goal of email	tactics
Potential customers	Sales	<ol style="list-style-type: none">1. Case studies and success cases2. News and articles that build trust and credibility3. Content that addresses the barriers to adoption
Leads	Lead nurturing -> sales	As above
Existing customers	Upsell and customer service	<ol style="list-style-type: none">1. Product updates and useful information2. Upsell content like success cases on using extra features, exhibiting data that proves efficiency and worth

Channel set up work: <ol style="list-style-type: none">1. Tools2. Materials3. Templates4. Lists5. Email collection	Tool used will be Mailchimp, Sumo will be used for collecting emails on website. Both tools need to be set up Templates and visuals for newsletter templates need to be created Email lists need to be uploaded and validated
Resourcing	Newsletter will be managed by partner xyz

Display & Video advertising

Digital advertising consists of display advertising and video advertising. Start planning from your advertising budget. This is the amount you want to spend in the advertising channels. It does not include cost of work.

<i>Overall channel plan:</i>	What: Create awareness and sales, collect leads	How: Run monthly campaigns focusing on certain target audience
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Advertising budget	5000
Channels and ad types 1. Display 2. Mobile 3. Video 4. Native 5. Social media 6. Display networks 7. Mobile networks	Run campaigns on display network (google) and social media. Optimize budget division emphasizing
Frequency & timing	5 day campaigns once a month. Pair with possible other activities like PR or relevant seasonality
Materials	Create banners and social media ads: images & copy
Channel audit	Social media channel content and copy need to be fixed and aligned with overall business strategy
Resourcing	Partner xyz will run the campaigns together with inhouse coordinator.
Tools, tracking and reporting	Google analytics needs to be set up for tracking campaigns. A dashboard for campaign reports need to be created. Partner xyz will report on campaign at latest 1 week after campaign has ended

Content marketing strategy 1/4

Draft your content marketing strategy here. Look back to your “trends, topics and discussion points”-slide and answer the questions below in order to come up with specific topics to create content on.

Questions to ask:

Themes and topics:

- What are you a specialist on, where can you gain though leadership?
- What topics you know a lot about as a business?
- What is the area you are changing in the market?
- What topics interest your target audiences?

Trends and megatrends:

- What cultural changes support your business case?
- Which global megatrends are aligned with your offering?
- Which local changes or conditions support your business case?
- What are the areas you change in your customers lives

Barriers to adoption:

- What are possible barriers to adoption of your offering?
- If a potential customer declines or hesitates, what is the likely reason?

Overall business goals:

- Can you support your business goals with content?
- What kind of content would help you achieve your business goals?

Themes and topics:	IoT, cloud computing, new network technologies, managing IT products
Trends and megatrends	Net Neutrality, Digitalization, Urbanization
Barriers to adoption	Company credibility Not understanding the offer
Overall business goals	Build awareness and trust Sales

Content marketing strategy 2/4

Having drafted your topics in the previous part, have a look at the list of different types of content below, and think about which content types would suit your business, goals and resources / capabilities best.

Content types to choose from:

- Longer format social media posts with or without visuals (a “long post” with character limits on some, for example LinkedIn)
- Articles (blog posts, guest blog posts, linkedin articles)
- Case studies & customer introductions
- Sales materials
- Ebooks
- Free templates
- Infographics
- Datasheets
- Whitepapers
- Podcasts
- Video
- Questionnaires
- ...

Content marketing strategy 3/4

You have your topics figured out and content types reviewed now. Here you can tie your more specific content ideas to your business, marketing & sales goals.

Goals	Target groups	Content types that support achieving goals
Build awareness	All potential customer groups	<ol style="list-style-type: none">1. Articles on company story2. Frequent social media posts and active discussion about topics 1 2 & 3 in order to gain share of voice and thought leadership3. Blog posts on topic 1 2 & 3
Sales	Most potential customer groups	<ol style="list-style-type: none">1. Success cases2. Infographics exhibiting impact and benefits
Gain trust & credibility	Potential customers, partners and investors	<ol style="list-style-type: none">1. Case studies on website and as marketing materials2. Introduce experienced employees on blog and social media3. Build FAQ

Content marketing strategy 4/4

Brainstorming topics / workshop?

CAMPAIGN TOPICS

Direct sales support: Materials

Now that you have your messaging and target groups figured out, you can materialize your strategy to your sales materials. Materials can be anything from case studies to sales decks, depending on your business model & sales strategy

Sales materials examples

- Case studies
- Sales decks
- Brochures online and offline
- Product sheets
- Whitepapers
- Pitch decks
- Presentations for public speaking
- Sendables
- Sales emails
- Merchandise

Sales support: Lead generation

There are many ways of generating leads from your web properties. Build a rough plan on how and where you collect leads and what kinds of paths you want to create for potential customers

Lead generation tools examples

- Google analytics
- Leadfeeder
- LinkedIn
- Mailchimp
- HubSpot

Lead generation tactics examples

- Onsite Chat
- Newsletter
- Inbound marketing
- Event marketing
- Advertising
- Product trials
- Invitation lists

Marketing calendar

Creating a marketing calendar helps you run a well structured and focused marketing across channels. It is a detailed plan of what you will produce/post/publish and where and when. The format of the marketing calendar differs from company to company. There are plenty of templates available online to start with. Excel is the most popular format but tools like Trello are also growing in popularity.

Look for marketing calendar templates from Google here:

https://www.google.fi/search?biw=1920&bih=921&tbm=isch&sa=1&ei=F18TXNjCIMKtsgHxk4aIAG&q=marketing+calendar+tremplate&oq=marketing+calendar+tremplate&gs_l=img.3...961.6956..7273...0.0..1.58.1906.40.....2....1.gws-wiz-img.....0..0j0i67j0i5i30j0i8i30j0i24.hZDS0Daqpo4

Sometimes it makes sense to have a separate editorial calendar for content marketing. Look for templates from Google here:

https://www.google.fi/search?biw=1920&bih=921&tbm=isch&sa=1&ei=H18TXOOhF4eYsAGoq6HIAO&q=editorial+calendar+tremplate&oq=editorial+calendar+temple&gs_l=img.3...63458.66087..66277...0.0..0.103.1622.17j1.....1....1.gws-wiz-img.....0i10i24.wjXiVBcCyV8

Tools & tracking plan

There are many marketing tools to choose from. Some tools only do one thing, others do everything, Price range is from free to hefty enterprise pricing. Choose the kind of tools that fit your goals and resources.

Tracking	Google analytics Firebase AppAnnie Mixpanel KissMetrics Google Data Studio etc...
Tools	Mailchimp HubSpot Marketo IFTTT Buzzsumo Buffer AutoPilot etc..

Reporting

Design your reporting in order to make sure you'll have the right information available to right people

Who reports to whom	What is reported	Frequency & manner

Responsibilities

In order to run your marketing smoothly, it makes sense to assign responsibilities from smaller but important tasks like taking photos in events to larger entities.

Area / tasks	Break down	Responsible person or partner
SEM & SEO	Running and optimizing SEM campaigns. Reporting. Ongoing SEO management. Reporting	Partner xyz
Social media management	Daily management of all social media channels	Person xyz
Visuals	Design and production of marketing visuals (video, images and graphics)	Partner xyz
Own photos	Quality photographs to website and social media ta events and daily business operations	Person xyz
Marketing calendar management and ongoing planning	Keeping marketing calendar up to date, making sure there are topics and activities for the coming weeks / months. Adding seasonality / event / extra entries to calendar	Person XYZ

Schedule

This schedule is for the preparing work, setups and building work.

Execution

- Set up and building work
 - Website
 - Channels
 - Materials
 - Tracking and tools
 - Reporting
- Marketing & campaign management

Set up and building work: Website

Before you can get to a point where you can start running your marketing activities, some initial set-up work is usually required depending on your plan. This is your checklist:

Website	<ul style="list-style-type: none">- Align visuals to brand identity- Align messaging with strategy- Create missing content- Reorganize if necessary- Fix content errors- SEO crucial fixes- Add tracking- Integrate tools- Build landing pages and other pieces that are required for executing your marketing plan
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Set up and building work: Channels

Before you can get to a point where you can start running your marketing activities, some initial set-up work is usually required depending on your plan. This is your checklist:

Facebook	<ul style="list-style-type: none">- Align visuals to brand identity- Align messaging with strategy- Facebook Pixel- Link directing- If channel is new or little used, create a few posts to populate the channel- Set up tracking to Google analytics for example
Instagram	<ul style="list-style-type: none">- Align visuals to brand identity- Align messaging and bio with strategy- If channel is new or little used, create a few posts to populate the channel- Set up tracking to Google analytics for example
Twitter	<ul style="list-style-type: none">- Align visuals to brand identity- Align messaging and bio with strategy- If channel is new or little used, create a few posts to populate the channel- Set up tracking to Google analytics for example
Linkedin	<ul style="list-style-type: none">- Create a company page- Align visuals to brand identity- Align messaging and bio with strategy- If channel is new or little used, create a few posts to populate the channel- Set up tracking to Google analytics for example

Set up and building work: Channels

Before you can get to a point where you can start running your marketing activities, some initial set-up work is usually required depending on your plan. This is your checklist:

SEM	<ul style="list-style-type: none">- Do keyword research- Set up SEM account- Build initial campaigns- Add tagging & scripts
SEO	<ul style="list-style-type: none">- Run a website audit- Critical fixes- Keyword research
Email	<ul style="list-style-type: none">- Setup email tool (Mailchimp, hubspot etc)- Setup integrations- Build templates- Create visuals for templates- Create contact and lead lists- Share access to relevant people
Content marketing	<ul style="list-style-type: none">- Create the initial contents

Set up and building work: other materials

Before you can get to a point where you can start running your marketing activities, some initial set-up work is usually required depending on your plan. This is your checklist:

Materials	<p>List here the materials you need to create before you can start running your marketing according to your plan.</p> <ul style="list-style-type: none">- Case studies- Landing pages- Social media posts to populate the accounts- First planned social media post copy and images / videos- First piece of content- First advertising campaign copy and ads- Create first emails to be sent out
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Set up and building work: tools & tracking

Before you can get to a point where you can start running your marketing activities, some initial set-up work is usually required depending on your plan. This is your checklist:

Tracking	Make sure you have tracking in place before you start, and that you are tracking the right things. <ul style="list-style-type: none">- Setup Google analytics to match with your goals- Setup Firebase- Build relevant dashboards- Share access with relevant people
Tools	There is a long list of marketing tools to choose from, think it through. Most expensive is not always the best but using many separate tools can be a lot of work as well <ul style="list-style-type: none">- Email -tool- Social media tools- Additional BI tools- Content marketing tools- Lead generation tools- Landing page tools

Marketing management

You are good to go! Now you can start managing your marketing according to the strategy and plan you have just created. Here are some best practices:

- You don't always have to stick to the plan, but do stick to the strategy
- Optimize your digital channels actively especially in the beginning in order to learn what works for your business
- Take feedback from your customers seriously and make it work for you
- Make most out of the materials you create. You can promote and repost a good article several times. And you should distribute all content through as many channels as possible
- Always have a goal!

A black and white photograph of a hand holding a whiteboard marker, writing the word "done" in cursive on a whiteboard. The marker has "WHITEBOARD MARKER" printed on it. The background is a whiteboard with a grid pattern.

done

...and repeat.

Questions? Need more help? Contact us at nina@bayarea.fi

Visit bayarea.fi to get to know our marketing & business growth freelancers.

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