

COMPANY
LOGO

Company Name

MARKETING PLAN [TEMPLATE]

AUTHOR NAME

Creating a comprehensive, integrated marketing plans requires reflecting on your current state of affairs, scoping out the future, and establishing an actionable plan to move your business toward your short- and long-term goals. In our complementary marketing plan template, we outline exactly what you need to create your foundation for success.

To keep it simple, we have broken out the marketing plan into 5 buckets that encompass the primary marketing and sales components of any business. For each bucket you must:

- Conduct a thorough assessment of all your current assets
- Decide what needs to be updated or refreshed
- Outline what assets you need to add to your marketing initiatives

Ultimately, a successful marketing plan only works when all the parts are working together. Once you've got a firm grasp on where you are now, you can better and more efficiently implement the marketing initiatives you need to move forward.



BUCKET 1

Marketing Assets

All of the items below make up your marketing assets – a scalable and flexible website, cutting-edge marketing tools and software, brand messaging and collateral, plus reports, goals, and supporting materials. It is imperative that prior to beginning any new marketing initiatives that you first address your foundation – it is where the most impact can be had.

When evaluating your current foundation, look for areas that can be refreshed to bring it up to best practices. We know you're eager to move on to the shiny new object (your new marketing objectives) and we will not let perfect become the enemy of good here. But we know from experience that — for your new initiatives to deliver the greatest impact — it is essential to first get your house in order.

For each group of marketing assets, list each element that you already have, highlight what needs updating, and include new assets you would like to add.

1. Website & Major Projects

CMS

AMS

ESP

Conversion or new CMS

New website functionality

UX/UI

[enter more here]

2. Software & Technology

Marketing automation software

Social media monitoring

Keyword tracking

Email service

Lead capture forms

Call tracking

Heat and click mapping

Session recording

Chat software

[enter more here]

3. Buyer Personas

Have you done them?

Do they need to be updated?

Do you need additional buyer personas?

Do you have an example of the buyer's journey?

[enter more here]

4. Branding

Brand identity

Logos

Typography

Colors

Messaging

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Imagery/photography

[enter more here]

5. Marketing Budget

[enter more here]

6. Reporting/KPIs

Conversion rate

CTR

of new leads

Qualified leads

Cost per lead

Revenue per lead

SEO metrics

Social metrics

[enter more here]

7. Quarterly plans/goals/objectives

[enter more here]

BUCKET 2

Sales Support

Your sales support materials need to stay as up-to-date as all of your marketing assets, tools, and strategies. With robust sales support, your sales team will be able to perform their jobs at a higher level and represent your brand in the way that helps you stand out from competitors.

For each sales support tool, list each element that you already have, highlight what needs updating, and include new assets you would like to add.

1. Sales Support

Sales deck

Brochure/brochure updates

Trade Show Support

[enter more here]

BUCKET 3

Organic Digital Marketing

Your organic digital marketing program should enlist a full suite of digital tactics that provide a comprehensive approach to getting your business more leads. By leveraging digital marketing strategies and best practices (including web and graphic design, content creation and strategy, SEO, and more), you will generate more traffic and more leads. Success is measured by KPIs (key performance indicators) that you establish before undertaking any new marketing initiatives. Plan the work, work the plan, and measure your success against established goals.

For each organic digital marketing category, list each element that you already have, highlight what needs updating, and include new assets you would like to add.

1. Content Creation

Downloadable content offerings

Landing pages

Thank you pages

Optimized web copy

Calls-to-action (CTAs)

Lead nurture campaigns

Blog posts

Webinar

2. SEO

[enter elements here]

3. Social media

[enter elements here]

4. Email marketing

[enter elements here]

5. Video creation

[enter elements here]

6. Website Design A/B Testing

[enter elements here]

7. Landing Page Strategy

[enter elements here]

8. Call-To-Action Strategy

[enter elements here]

9. Link Building/Earning

[enter elements here]

10. Infographic Design

[enter elements here]

11. Marketing Automation

[enter elements here]

12. Lead Nurture Strategy

[enter elements here]

BUCKET 4

Paid Digital Marketing

Your paid digital marketing efforts should be aimed at generating leads and/or sales, not clicks, impressions, click-through-rates (CTR), or any other vanity metrics. Optimize your paid marketing tools and plans for the metrics your business understands and cares about. Furthermore, your paid strategy should be integrated with your organic digital marketing strategy. This creates new opportunities and efficiencies that will otherwise be missed.

For each paid digital marketing category, list each element that you already have, highlight what needs updating, and include new assets you would like to add.

1. PPC

[enter more here]

2. SEM

[enter more here]

3. Paid Social

YouTube Advertising

Facebook Ads

Instagram Ads

LinkedIn Ads

Twitter Ads

[enter more here]

4. Remarketing/retargeting

[enter more here]

BUCKET 5

Paid Traditional

Paid traditional marketing, also known as outbound marketing, are all the tools people tend to associate with advertising – TV and radio ads, print ads, billboards, direct mailers, etc. The premise of paid traditional is to utilize a medium with a large following to communicate your brand messaging. The hope is that with some careful planning and a study of the demographics, a small percentage of the audience will engage with your paid traditional marketing and convert into a customer.

For each paid traditional marketing category, list each element that you already have, highlight what needs updating, and include new assets you would like to add.

1. Billboards

[enter elements here]

2. Radio Ads

[enter elements here]

3. TV Ads

[enter elements here]

4. Print Ads

[enter elements here]

5. Public Relations

[enter elements here]

6. Sponsors/Non-Profit

[enter elements here]