

Creating a Marketing Plan - Worksheet

Note: You need a separate plan for EACH goal for your business. If you only have one goal, leave the other goals blank.

- 1. Set your goal(s):** What's going on with your business? What specific change or result do you want to happen? By when? Set goals that are **Specific, Measurable, Agreed-upon, Relevant, and Time-bound (S.M.A.R.T.)**.
 - **Examples:**
 - By the end of June, 2016, attract at least 30 new customers to buy at least once a week.
 - Before the end of this year, get at least 50 or more of my existing customers to come back to the store and make a purchase.
 - In 2016, attract at least 2 new small business owners per month.
 - **List 1-3 S.M.A.R.T. goals.**
 - **Goal 1:**
 - **Goal 2:**
 - **Goal 3:**
- 2. Select your target customers(s):** Are you trying to reach current customers or new people? What do you want them to do (e.g. buy more per visit)? What do they want/need most (e.g. Is saving time or money more important to them? Is buying something cheap and fashionable or something high quality and lasting more important to them?) What can you offer to meet that need? (For example, a busy working professional will pay more for a pre-made dinner they can just heat-and-serve if it includes local ingredients.) What are the best ways to reach them (e.g. email, social media, in person, word of mouth)? Why would they want to buy from you rather than your competitors (e.g. you are more convenient, offer higher quality, or provide service)?
 - **Example:**
 - Youngish women come into my corner store with their children in mid-afternoon every day after they pick their kids up from school. The women want to buy a healthy snack that their kids will like. The women are on their cell phones all day, so mobile messages, ads, or social media at the right time of day will suggest something they can buy (e.g. frozen fruit bars). They will come to my store because it is on their way home and they can just grab and go.

- **List the target customers for each of your goals.**

- **Target customers for Goal 1:**

- **Target customers for Goal 2:**

- **Target customers for Goal 3:**

3. Create and implement a plan for each of your goals: What can you do (e.g. stock and promote specific products, offer a service, distribute coupons, hold an event) that will motivate your target customers to buy your product or service (or do what you want them to do)? What specific tools (website, postcards, events) and outlets (Facebook, door-to-door, email) do you need to carry out your plan? What specific steps will you (or others) do by what date to attract your customers and get them to act? What will you do first, second, third, etc.?

- **Examples:**

- Ask youngish mothers what snacks they would like to buy for their kids and what social media they use (by 3/1). Stock those products (by 4/1). Display those products (offer samples, if possible) by 4/15. Provide incentives to sign up on social media (by 4/30). Post a photo or ad on social media at the best time of day to reach them (by 5/15).
- Talk to the business next door. Create a “package deal” – anyone who buys a pizza gets a discount coupon for ice cream at your store (and vice versa).
- Use a “Buy Local” approach to appeal to young customers to buy retail instead of online. Post a sign explaining how buying local helps the community. Post an information card by each product describing who makes the product and why it’s special.

- **List actions for each of your goals/customers:**

- a. **Steps to achieve Goal 1:**

- Step 1:

- Step 2:

- Step 3:

- b. **Steps to achieve Goal 2:**

- Step 1:

- Step 2:

- Step 3:

- c. **Steps to achieve Goal 3:**

- Step 1:

- Step 2:

- Step 3:

4. Measure your results. How will you know if your plan worked? What will you measure (e.g. total sales compared to last year, new customers on mailing list)? How will you measure it? (e.g. number of coupons redeemed, additional sales during an event)?

- How will you track or record your activities and results (e.g. on paper, in a database)?
- Do you have a numerical benchmark of where you are currently?
- At the end of season or year, evaluate what you did: Did you achieve your goals? What will you do next time? Reflect and celebrate!