Marketing Plan Template

Quick Start Guide:

1. Go to File > Make a Copy

2. Edit to your heart's content!

OR

1. Go to File > Download As > Microsoft Word

2. Save the file and edit away!

How to Use This Template to Write Your Marketing Plan

So it's time to write a marketing plan! This template will get you started — and get the job done. It includes all the major sections you'll need for a complete digital marketing plan.

- Business Summary
- Executive Summary
- Business Goals
- Market Analysis
- Competitive Analysis
- Target Market

- Unique Selling Proposition
- Marketing Initiatives
- Marketing Channels
- Measurements & KPIs
- Budget

Each section includes instructions for filling it out. You can remove sections, add sections, and move things around to suit your business' needs. For more complete guidance, be sure to check out our companion blog post on How to Write a Marketing Plan.

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Logo Here.

[Company Name]

Marketing Plan

[Date]

Points of Contact

[Name]
[Title]
[Contact Information]

[Name]
[Title]
[Contact Information]

Your Image Here.

Table of Contents

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Business Summary

[Company Name]

[Company Name] is a [market category] company headquartered in [City, State] with offices in [other office locations]. We provide [services or products] to [customer types] who want to [customer goals].

Our Mission

[Mission statement]

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No mission statement? No worries!

What is the purpose of your business? What problem are you trying to solve? What's your vision for the future?

Once you have your "why," move on to your "how." What concrete actions is your company taking to achieve your purpose? Put the two together, and you have a mission statement.

Contact us for help writing your company's mission statement.

Our Marketing Team Leaders

[Name]	[Job title and brief bio]
[Name]	[Job title and brief bio]
[Name]	[Job title and brief bio]

Executive Summary

Overview

[Write a compelling introduction setting the stage for your marketing plan. Treat this section as a short, engaging narrative that tells the story of where your company stands, where it's going in the next year, and what role marketing will play in that journey.]

Market Summary

[Give a brief overview of the state of the market and your company's competitive position, drawing on insights from the Market Analysis section of your marketing plan.]

Customer Summary

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[Buyer Persona Name]	Awareness: • [Problem or challenge they face] • [Information source]	Consideration: • [Question they need answered] • [Question they need answered]	Decision: • [Reason to choose your brand]
[Buyer Persona Name]	Awareness: • [Problem or challenge they face] • [Information source]	Consideration: • [Question they need answered] • [Question they need answered]	Decision: • [Reason to choose your brand]

Goals & Strategies

Goal: [Summarize goal]	**Strategy:** [Briefly describe how you will achieve your goal]
Goal: [Summarize goal]	**Strategy:** [Briefly describe how you will achieve your goal]
Goal: [Summarize goal]	**Strategy:** [Briefly describe how you will achieve your goal]
[Add more rows by right-clicking a cell, then selecting Insert > Rows Above / Rows Below]	

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Budget Breakdown

[Initiative Name]	$/month
[Initiative Name]	$/month
[Initiative Name]	$/month
[Add more rows by right-clicking a cell, then selecting Insert > Rows Above / Rows Below]	
Total Monthly Budget	$/month

Conclusion

[Wrap up your executive summary with a few sentences to encourage your audience to read the entire plan.]

Business Goals

[Company Name] is focused on [overarching business goal] in [year]. To enable us to get there, the marketing department will set out to achieve the following:

[Goal 1]

Overview	[Example: We will acquire 10% more new customers this year.]
Strategy	[Example: We will increase the number of online appointments by 100%]

[Goal 2]

Overview	[Example: We will acquire 10% more new customers this year.]
Strategy	[Example: We will increase the number of online appointments by 100%]

[Goal 3]

Overview	[Example: We will acquire 10% more new customers this year.]
Strategy	[Example: We will increase the number of online appointments by 100%]

VITAL PRO TIP

Writing great goals and strategies

Remember, your goals are what you set out to achieve and your strategies are the high-level approaches you'll take to get there. You'll cover tactics, or the nitty-gritty of *how* you'll achieve your goals in the Marketing Initiatives section of your plan.

Write S.M.A.R.T. goals: Specific, measurable, attainable, realistic, and timely.

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Market Analysis

Overview

The [category] market in [geographical area] is a [$ amount] per year business, with [number] [products] sold and [number] potential customers.

- **Market trends:** [Summarize current market trends]
- **Market forces:** [Summarize any economic or regulatory forces affecting the market]
- **Market forecast:** [Summarize any predicted shifts in the market over the coming year]

SWOT Analysis

Strengths	Weaknesses
- [What your company is good at - What is working well - What your satisfied customers say about you]	- [What is holding your company back - What needs improvement - What customers are dissatisfied with]

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Opportunities	Threats
[How your company is positioned to take advantage of market trends - What you're doing better than the competition - Why future customers will choose you]	[What market trends and forces threaten your company's growth - How competitors might outperform you - What potential customers might choose over your company]

Competitive Analysis

[List your major competitors, along with relevant information about their brands, positions in the marketplace, and how they compete with your company's marketing.]
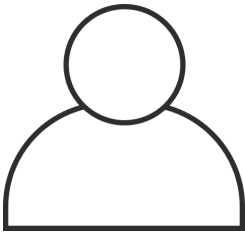
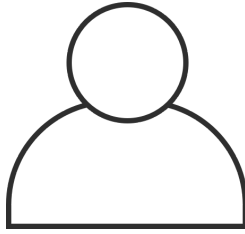| Competitor Name	Core Message	Marketing Competition
[Company Name]	[Slogan or USP]	[Example: - Blog ranks high for keywords we want to target - Running paid ads on our branded keywords]
Strengths	**Weaknesses**	
[Example: - Less expensive product - Bigger market share]	[Example: - Lower-quality product - High-pressure sales environment]	

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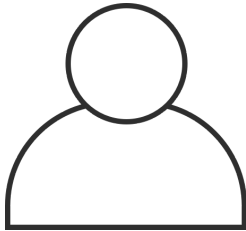| Competitor Name	Core Message	Marketing Competition
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Buyer Personas

[Buyer Persona Name]

	Overview: [Write a brief introduction to the persona. Include job title and function and relevant demographic and psychographic details.]		
	"I want [the core need or desire your company fulfills for this persona.]"		
Where [Name] Gets Information	[Ex: Google search]	[Ex: Word-of-mouth]	[Ex: Industry newsletter]
Goals: • [Goal 1 • Goal 2 • Goal 3]		**Questions & Concerns:** • [Question 1 • Question 2 • Question 3]	
Challenges & Pain Points • [Pain point 1 • Paint point 2 • Pain point 3]		**How [Company Name] Helps:** • [Benefit 1 • Benefit 2 • Benefit 3]	

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	Overview: [Write a brief introduction to the persona. Include job title and function and relevant demographic and psychographic details.] **"I want [the core need or desire your company fulfills for this persona.]"**		
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• Goal 3]	• Question 3]
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[Buyer Persona Name]

Overview: [Write a brief introduction to the persona. Include job title and function and relevant demographic and psychographic details.]

"I want [the core need or desire your company fulfills for this persona.]"

Where [Name] Gets Information	[Example: Google search]	[Example: Word-of-mouth]	[Example: Industry newsletter]

Goals: • [Goal 1 • Goal 2 • Goal 3]	**Questions & Concerns:** • [Question 1 • Question 2 • Question 3]
Challenges & Pain Points • [Pain point 1 • Paint point 2 • Pain point 3]	**How [Company Name] Helps:** • [Benefit 1 • Benefit 2 • Benefit 3]

VITAL PRO TIP

Creating Great Personas

Check out our blog post, **How to Create Buyer Personas for Your Brand** for further insights into researching, writing, and using buyer personas — with a free downloadable template for creating more detailed personas.

Unique Selling Proposition

Our unique selling proposition explains what sets us apart from the competition, and why our customers should choose us over the others.

[Example: Get more high-quality leads with the digital marketing agency that focuses on your entire sales funnel — not just the "buy now" crowd.]

VITAL PRO TIP

How to Write Your USP

To create a powerful, effective USP, ask yourself these questions:

1. What do our customers want that we can provide?
2. What do we do better than the competition?
3. What is the most important benefit to your customers of choosing our company over the competition?

Contact us for more help writing a USP that will make you stand out from the crowd.

Marketing Initiatives

To achieve our business goals of [goal 1], [goal 2], and [goal 3], our marketing team will undertake the following projects and initiatives in [year].

[Initiative 1]

Overview	[Example: We will create a content marketing calendar to support production and publication of bi-weekly blog posts.]
Goals	[Example: • Rank organically on the first page of the search engine results page (SERP) for 10+ high-value keywords • Increase organic traffic to our website by 50%]
Process	[Example: • Perform keyword research • Do competitor research on top 3–5 ranking blog posts • Write copy • Design graphics • Publish • Promote posts via email, social, and/or PPC]

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[Initiative 2]

Overview	[Example: We will create a content marketing calendar to support production and publication of bi-weekly blog posts.]
Goals	[Example: • Rank organically on the first page of the search engine results page (SERP) for 10+ high-value keywords • Increase organic traffic to our website by 50%]
Process	[Example: • Perform keyword research • Do competitor research on top 3–5 ranking blog posts • Write copy • Design graphics • Publish • Promote posts via email, social, and/or PPC]

[Initiative 3]

Overview	[Example: We will create a content marketing calendar to support production and publication of bi-weekly blog posts.]

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Goals	[Example: • Rank organically on the first page of the search engine results page (SERP) for 10+ high-value keywords • Increase organic traffic to our website by 50%]
Process	[Example: • Perform keyword research • Do competitor research on top 3–5 ranking blog posts • Write copy • Design graphics • Publish • Promote posts via email, social, and/or PPC]

Marketing Channels

We will reach our future customers on the following channels in order to drive traffic to our site, generate leads, increase brand awareness, and establish thought leadership in our industry:

[Example: Google Search Ads]	
Goals	[Examples: • Increase website traffic • Generate early-stage leads]

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Metrics	[Examples: • Click rate • Cost per conversion]

[Example: Industry Website]

Goals	[Examples: • Brand awareness • Thought leadership • SEO via link-building]
Metrics	[Examples: • Page views • Engagement & interactions • Page rank of link target]

[Example: Social Media Platform]

Goals	[Examples: • Brand awareness • Sales]
Metrics	[Examples: • Impressions • Engagement & interactions • eCommerce store visits • Cart fills]

Measurement & KPIs

During [year], we will track data and report monthly on the following KPIs:

[Example: SEO]		
KPIs	[Examples: • Organic page traffic • Site visibility	• Keyword rankings • Organic sessions • Organic click-through-rate]
Benchmark	[Insert benchmark values for each of the KPIs you'll measure and report on.]	
Goals	[Insert growth goals for each of the KPIs you'll measure and report on.]	

[Example: SEO]		
KPIs	[Examples: • Organic page traffic • Site visibility	• Keyword rankings • Organic sessions • Organic click-through-rate]
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[Example: SEO]

KPIs	[Examples:
	   • Organic page traffic
	   • Site visibility
		• Keyword rankings
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[Example: SEO]

KPIs	[Examples:
	   • Organic page traffic
	   • Site visibility
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		• Organic sessions
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[Example: SEO]

KPIs	[Examples:	• Keyword rankings

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	• Organic page traffic • Site visibility · Organic sessions · Organic click-through-rate]
Benchmark	[Insert benchmark values for each of the KPIs you'll measure and report on.]
Goals	[Insert growth goals for each of the KPIs you'll measure and report on.]

Budget

During [year], [Company Name] will allocate [%] of last year's revenue toward marketing initiatives, for a total marketing budget of [$].

Expense Category	Estimated Cost
[Category]	
[Category]	
[Category]	
[Category]	
[Category]	
[Add more categories by right-clicking a cell, then selecting Insert > Rows Above / Rows Below]	
Total	**[Total Marketing Expense for the Year]**

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Need Help Writing Your Marketing Plan?

Check out our blog post on **How to Write a Marketing Plan** for more detailed instructions of each step.

OR

Get In Touch!

Contact us online to start the conversation about how we can help write and execute a marketing plan that will enable your business to meet its goals, grow its revenues, and beat the competition.

Contact Us