

# MARKETING PLAN TEMPLATE

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DESIGN



## STEP ONE: **RESEARCH**

Ideal Customer  
Competitor Analysis  
SWOT Analysis

# IDEAL CUSTOMER

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Identify your ideal customer with market segmentation.



## DEMOGRAPHIC

- age
- income
- marital status
- education level
- profession

## GEOGRAPHIC

- neighbourhood
- city
- province
- country

## PSYCHOGRAPHIC

- values/beliefs
- interests/hobbies
- personality
- life goals

## BEHAVIOURAL

- occasion for use
- spending habits
- browsing habits
- pain points

# COMPETITOR ANALYSIS

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Use this to assess your competitors business so you can better understand the market/ your industry. Some things to think about are: price, quality, features, and consumer experience.



STRENGTHS	COMPETITOR 1	WEAKNESSES

STRENGTHS	COMPETITOR 2	WEAKNESSES

STRENGTHS	COMPETITOR 3	WEAKNESSES

# SWOT ANALYSIS TEMPLATE

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Use this to assess your business.



<b>STRENGTHS</b>	<b>WEAKNESS</b>
<b>OPPORTUNITIES</b>	<b>THREATS</b>

A central graphic consisting of four overlapping semi-circles arranged in a circle. The top-left semi-circle is dark blue with a white letter 'S'. The top-right semi-circle is brown with a white letter 'W'. The bottom-left semi-circle is teal with a white letter 'O'. The bottom-right semi-circle is maroon with a white letter 'T'.



## STEP TWO: MARKETING

SMART Goals  
Marketing Channels  
Marketing Slogans

# SMART GOALS

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Define your marketing goals using with the SMART goal method.



**SPECIFIC**

**S**

**MEASURABLE**

**M**

**ACHIEVABLE**

**A**

**RELEVANT**

**R**

**TIME-BOUND**

**T**

# MARKETING CHANNELS

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Choose the marketing channels that fit your goal. Include the purpose of the channel and the key performance indicator (KPI) to measure results.



<p><b>CHANNEL 1</b></p> <p>1</p>	<p><b>CHANNEL 2</b></p> <p>2</p>
<p><b>CHANNEL 3</b></p> <p>3</p>	<p><b>CHANNEL 4</b></p> <p>4</p>



# MARKETING SLOGANS

Brainstorm a short-term key message to use in your selected marketing channels. Refer back to your marketing goals for the message that you want to convey to your ideal customer.

The other three columns use different approaches to spark slogan ideas.



## KEY MESSAGE

- include your USP (unique selling proposition)
- write in in your brand voice

## VERB

- conveys an action

## LITERARY DEVICE

- rhyme
- alliteration
- repetition
- reversal
- double-entendre

## GENERATORS

- chat gpt
- shopify
- oberloo



STEP THREE:  
**BUDGET**



# SAVING YOUR FILLABLE PDF

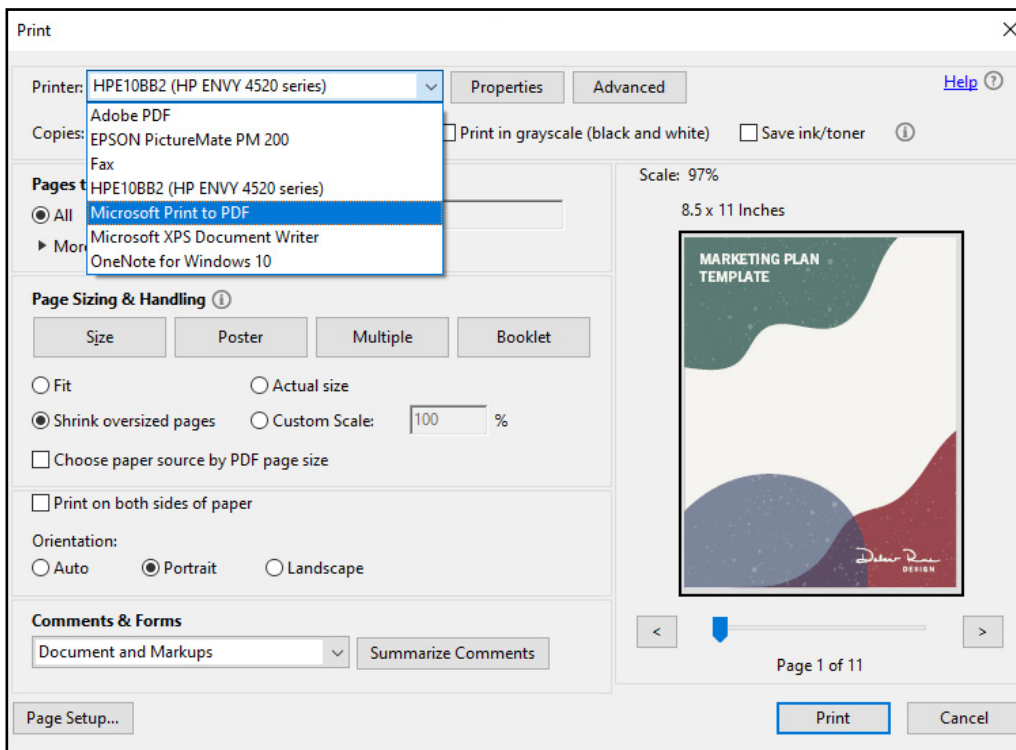
Congrats on completing your marketing plan!

Sometimes saving a fillable PDF into a flattened print version can be tricky. Here's how to do it.



## HOW TO FLATTEN AND SAVE YOUR MARKETING PLAN

1. Click File and select Print
2. From the printer drop down menu select Microsoft Print to PDF.



3. If you don't want to include this instruction page. Choose pages 1 - 11.
4. Click Print.
5. In the pop-up window, choose file location and an appropriate name.
6. Now you have a flattened version of your PDF that you can send to people.