

Marketing plan template for small businesses

How to



use this template

Whether you're a sole trader or a small business with employees, a marketing plan will help you build customer relationships and promote your products or services. Why write your marketing plan down? That's the key to keeping you on track as you grow your business.

This template can be used to establish and track your marketing strategy over time. Each section is editable so you can fill in your business goals, details of who your customers are, and what marketing channels you'll use.

Your marketing plan

- Goals
- Executive summary
- Audience
- Research
- Strategy
- Performance metrics
- Budget
- Marketing calendar

Goals

What are your marketing goals?

Detail your overall marketing objectives for your small business, or smaller marketing goals if this plan is for a specific campaign or product launch.

Primary goal

Other goals





Executive summary

Summarise your marketing plan here

A large, empty white rectangular box with rounded corners, intended for summarizing the marketing plan.

Audience

Who are your customers?

Create a profile of your existing customers or group(s) you want to target. This helps you understand who your customers are and means you can tailor your marketing to reach them.

Customer profile	
Age	
Gender	
Location	
Family	
Education	
Interests/hobbies	

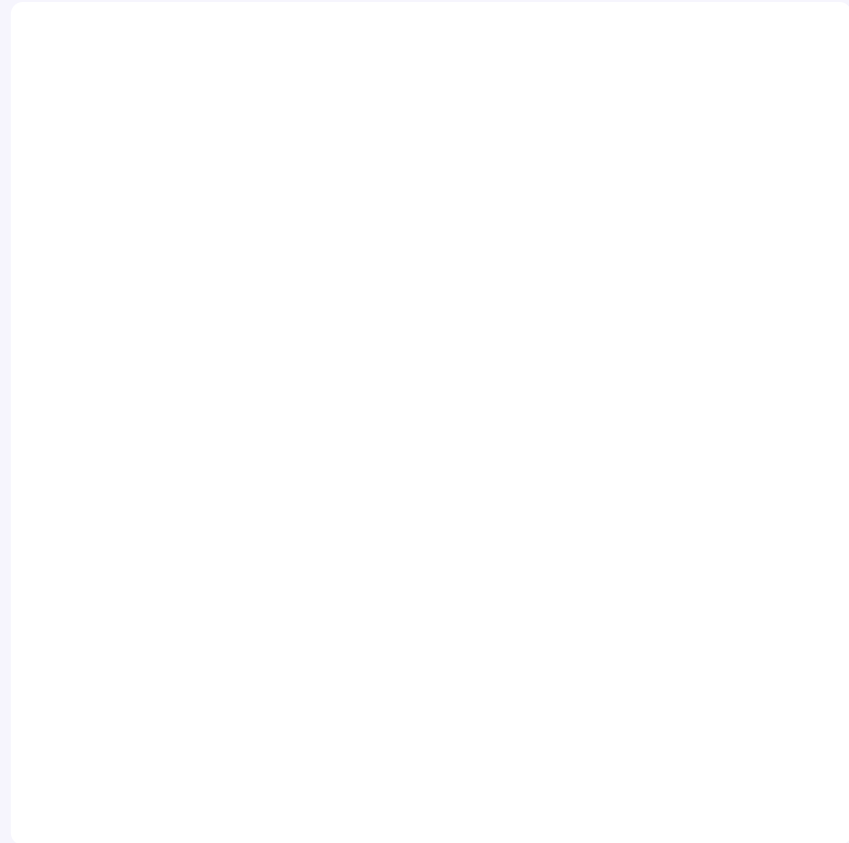




Research

Research your industry, market trends, and key competitors. This can help you identify where the opportunities are for you to stand out.

Industry trends



Key competitors

Competitor analysis						
Company profile						
Products and services	Key features					
	Quality					
Pricing	Key details					
	Pricing strategy					
Marketing	Target market					
	Marketing strategy					
Extra notes						

Business opportunities



You might also want to gather research in other ways. Fill in the table below depending on the research method and results you gather.

Research method	Findings
Focus groups	
Interviews	
Surveys	
Pricing research	

SWOT analysis

A SWOT analysis of your business and competitors can also be helpful as part of your research.

SWOT analysis				
	Strengths	Weaknesses	Opportunities	Threats
Our company				
Competitor 1				
Competitor 2				
Competitor 3				
Competitor 4				

Strategy

Marketing channels

Your marketing strategy is how you're going to promote your business and stand out from your competitors. Here you can detail the marketing channels you want to use, the type of content you might share, and how you'll measure success.

Channel	Purpose	Measures
Social media (e.g Instagram, Facebook)		
Email		
Blog/content		
Paid ads		
Word of mouth		

Measure performance

Tracking how your marketing activity is performing is vital so you know you're going in the right direction. If something isn't working, you can adapt and keep testing to get the best results.

Your measures of success – or metrics – should link back to your overall marketing goals. For example, growing your Instagram following, visitors to your website, or product sales. You'd usually put these metrics as percentages.

Research method	Findings
Metric 1	
Metric 2	
Metric 3	
Metric 4	



Admin and budgets

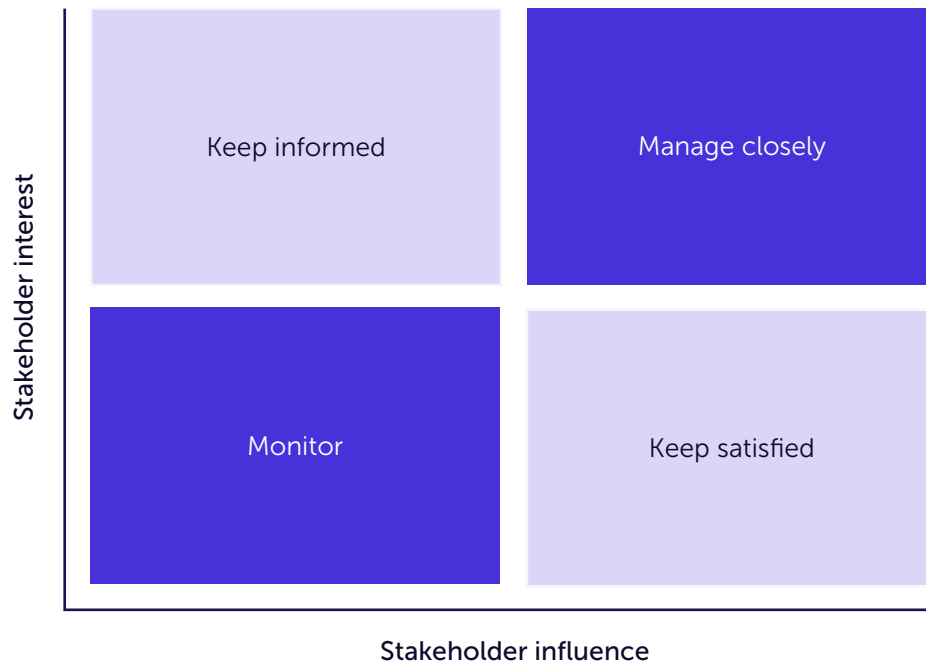


This could be your budget for the year, a quarter, or a specific campaign. Use the table below to list how you intend to spend your marketing budget and estimated costs.

Marketing expense	£
Flyers	
Facebook advertising	

Key stakeholders

Identify who (if anyone) you need to involve or keep updated as you move through your marketing plan. Plotting names on this stakeholder map below can be helpful if you have a number of people to keep in the loop.



Go-to-market strategy

How are you going to turn your marketing plan into action?

This is where you explain how you're going to launch your business or introduce a new product or service. It's important to have timelines and specific activities plotted out – perhaps using a calendar or a project management tool.

Key milestones

Customer personas

Customer journey map

Customer journey	Awareness	Research	Decision	Retention	Loyalty
Actions					
Emotions					
Motivations					
Barriers					
Touchpoints					



Your proposition

List your KSPs (key selling points) to define what makes your business different from your competitors:

A large, empty white rectangular box with rounded corners, intended for the user to list their key selling points (KSPs).

Distribution plan

Detail key activities across your marketing channels in a calendar or timeline to keep you on track. This is an example go-to-market strategy for a new product launch.

April 2024						
Mon	Tue	Wed	Thur	Fri	Sat	Sun
1 Countdown post on social with key benefit	2 Promotional banner on website	3	4 Send press release	5	6	7
8	9	10	11 Countdown post on social with key benefit	12 Behind the scenes video	13	14
15	16	17 Email existing customers with special offer	18 Share teaser video on Instagram	19	20 Launch product (online event with live Q&A)	21
22	23	24	25	26 Email existing customers with special offer	27	28
29	30					

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