

**Date:**  
**Company Name:**  
**Brand or Service:**

*Encapsulation, for executive review, of entire marketing plan in no more than two or three pages.*

*Complete statement of where the organization is today and how it got there. See Checklist for Situation Analysis (RL 7-1).*

*What business the organization is in and characteristics of the industry as a whole. Information available from industry trade publications, trade association newsletters, consumer business press, Department of Commerce publications.*

*All relevant information on the company and its capabilities, opportunities, and/or problems. Information may be found in annual reports, sales records, warranty card records, customer correspondence, sales staff reports.*

*Complete description and all relevant information on the product/service mix, sales, and the strengths and weaknesses therein. See sales literature, sales reports, dealer correspondence, and so on.*

1. I. Executive Summary
  1. A. Summary of situation analysis
  2. B. Summary of marketing objectives
  3. C. Summary of marketing strategies
  4. D. Budget summary
2. II. Situation Analysis
  1. A. The industry
    1. 1. Definition of industry and company business
    2. 2. History of industry
      1. a. Technological advances
      2. b. Trends
    3. 3. Growth patterns within industry
      1. a. Demand curve
      2. b. Per capita consumption
      3. c. Growth potential
    4. 4. Characteristics of industry
      1. a. Distribution patterns and traditional channels
      2. b. Regulation and control within industry
      3. c. Typical promotional activity
      4. d. Geographical characteristics
      5. e. Profit patterns
  2. B. The company
    1. 1. Brief history
    2. 2. Scope of business
    3. 3. Current size, growth, profitability
    4. 4. Reputation
    5. 5. Competence in various areas
      1. a. Strengths
      2. b. Weaknesses
  3. C. The product/service
    1. 1. The product story
      1. a. Development and history
      2. b. Stage of product life cycle
        1. (1) Introduction
        2. (2) Growth
        3. (3) Maturity
        4. (4) Decline
      3. c. Quality factors
      4. d. Design considerations
      5. e. Goods classification
        1. (1) Consumer or industrial good
        2. (2) Durable or nondurable good or service
        3. (3) Convenience, shopping, or specialty good
        4. (4) Package good, hard good, soft good, service
      6. f. Packaging
      7. g. Price structure
      8. h. Uses
        1. (1) Primary
        2. (2) Secondary
        3. (3) Potential
      9. i. Image and reputation
      10. j. Product/service strengths
      11. k. Product/service weaknesses
    2. 2. Product sales features
      1. a. Differentiating factors
        1. (1) Perceptible, imperceptible, or induced
        2. (2) Exclusive or nonexclusive
      2. b. Position in mind of customer
      3. c. Advantages and disadvantages (customer perception)
    3. 3. Product research and development
      1. a. Technological breakthroughs
      2. b. Improvements planned
      3. c. Technical or service problems
    4. 4. Sales history

*All relevant information about the people or organizations that comprise the current and prospective market for the firm's offerings. See market research reports, consumer/business press, trade publications, Census of Manufacturers, trade association reports.*

1. a. Sales and cost of sales
  1. (1) By product/service
  2. (2) By model
  3. (3) By territory
  4. (4) By market
2. b. Profit history for same factors
5. 5. Share of market
  1. a. Industry sales by market
  2. b. Market share in dollars and units
  3. c. Market potential and trends
4. D. The market
  1. 1. Definition and location of market
    1. a. Identified market segments
      1. (1) Past
      2. (2) Potential
    2. b. Market needs, desires
    3. c. Characteristics of market
      1. (1) Geographic
      2. (2) Demographic
      3. (3) Psychographic
      4. (4) Behavioral
    4. d. Typical buying patterns
      1. (1) Purchase patterns
      2. (2) Heavy users/light users
      3. (3) Frequency of purchase
    5. e. Buying influences on market
  2. 2. Definition of our customers
    1. a. Present, past, and future
    2. b. Characteristics
      1. (1) Shared characteristics with rest of market
      2. (2) Characteristics unique to our customers
    3. c. What they like about us or our product
    4. d. What they don't like
  3. 3. Consumer appeals
    1. a. Past advertising appeals
      1. (1) What has worked
      2. (2) What has not worked and why
    2. b. Possible future appeals
  4. 4. Results of research studies about market and customers
5. E. The competition
  1. 1. Identification of competitors
    1. a. Primary competitors
    2. b. Secondary competitors
    3. c. Product/service descriptions
    4. d. Growth and size of competitors
    5. e. Share of market held by competitors
  2. 2. Strengths of competition
    1. a. Product quality
    2. b. Sales features
    3. c. Price, distribution, promotion
  3. 3. Weaknesses of competition
    1. a. Product features
    2. b. Consumer attitude
    3. c. Price, distribution, promotion
  4. 4. Marketing activities of competition
    1. a. Product positioning
    2. b. Pricing strategies
    3. c. Distribution
    4. d. Sales force
    5. e. Advertising, publicity
    6. f. Estimated budgets
6. F. Distribution strategies
  1. 1. Type of distribution network used
    1. a. History of development
    2. b. Trends
  2. 2. Evaluation of how distribution is accomplished
  3. 3. Description and evaluation with channel members
  4. 4. Promotional relationship with channel members
    1. a. Trade advertising and allowances
    2. b. Co-op advertising

*Complete information about the competition, the competitive environment, and the opportunities or challenges presented by current or prospective competitors. See SEC Form 10-Ks, consumer/business press articles, Moody's Industrial Manual, Standard & Poor's reports, Dun & Bradstreet report, Thomas Register of American Corporations.*

*Complete discussion of how the firm's products/services are distributed and sold, what channels are available, and characteristics of channel members. See dealer and distributor correspondence, sales staff reports, advertising reports, trade*

*publication articles.*

*Background and rationale for firm's pricing policies and strategies, discussion of alternative options. Study sales reports, channel-member correspondence, customer correspondence, competitive information.*

*All relevant data concerning the firm's personal sales efforts and effectiveness as well as complete discussion of the firm's use of advertising, public relations, and sales promotion programs. Examine sales reports, advertising reports, articles in Advertising Age, Marketing Communications, and so on, in-house data on advertising, sales, and training.*

*Enumeration of environmental factors that may be beyond the firm's immediate control but affect the firm's business efforts. See government reports and announcements, consumer/business press, trade association articles.*

*Recitation of relevant attitudes and directives of management as they pertain to the firm's marketing and advertising efforts. Information available from corporate business plan, management interviews, internal memos and directives.*

*Enumeration or summary of problems considered most serious to the firm's marketing success.*

*Summary of those opportunities which offer the greatest potential for the firm's success. What general and specific needs the firm seeks to satisfy. Determine through study of*

3. c. Use of promotion by dealer or middlemen
4. d. Point-of-purchase displays, literature
5. e. Dealer incentive programs.
5. 5. Strengths/weaknesses of distribution systems
6. 6. Opportunities/threats related to distribution
7. G. Pricing policies
  1. 1. Price history
    1. a. Trends
    2. b. Affordability
    3. c. Competition
  2. 2. Price objectives and strategies in past
    1. a. Management attitudes
    2. b. Buyer attitudes
    3. c. Channel attitudes
  3. 3. Opportunities/threats related to pricing
8. H. Communication strategies
  1. 1. Past promotion policy
    1. a. Personal versus nonpersonal selling
      1. (1) Use of sales force
      2. (2) Use of advertising, public relations, sales promotion
    2. b. Successes and failures of past policy
  2. 2. Sales force
    1. a. Size
    2. b. Scope
    3. c. Ability/training
    4. d. Cost per sale
  3. 3. Advertising programs
    1. a. Successes and failures
    2. b. Strategies, themes, campaigns, media employed
    3. c. Appeals, positionings, and so on
    4. d. Expenditures
      1. (1) Past budgets
      2. (2) Method of allocation
      3. (3) Competitor budgets
      4. (4) Trend
  4. 4. Opportunities/threats related to communications
9. I. Environmental factors
  1. 1. Economy
    1. a. Current economic status
    2. b. Business outlook and economic forecasts
  2. 2. Political situation
  3. 3. Societal concerns
  4. 4. Technological influences
10. J. Corporate objectives and strategies
  1. 1. Profitability
    1. a. Sales revenue
    2. b. Cost reductions
  2. 2. Return on investment
  3. 3. Stock price
  4. 4. Shareholder equity
  5. 5. Community image
  6. 6. New product development
  7. 7. Technological leadership
  8. 8. Mergers and/or acquisitions
  9. 9. Overall corporate mission
11. K. Potential marketing problems
12. L. Potential marketing opportunities

**3. III. Marketing Objectives**

1. A. Market need objectives
  1. 1. Market need-satisfying objectives
  2. 2. Community need-satisfying objectives

<i>situation analysis factors and management discussions and interviews.</i>	3.	3. Corporate need-satisfying objectives
<i>Organization sales goals defined for whole company or for individual products by target market, by geographic territory, by department, or by some other category. Must be specific and realistic based on study of company capabilities, funding, and objectives.</i>	2.	B. Sales target objectives
<i>The method(s) by which the organization plans to achieve the objectives enumerated above.</i>	1.	1. Sales volume
<i>A general description of the type of marketing strategy the organization intends to employ.</i>	1.	1. <i>a.</i> Dollars
<i>A detailed description of the marketing mix(es) the firm intends to use to achieve its objectives.</i>	2.	2. <i>b.</i> Units
<i>The detailed tactical plans for implementing each of the elements of the firm's marketing mix</i>	3.	3. <i>c.</i> Territories
<i>Description of the methods the firm will use to review, evaluate, and control its progress toward the achievement of its marketing objectives</i>	4.	4. <i>d.</i> Markets
<i>Determination of the amount of money needed to conduct the marketing effort, the rationale for that budget, and the allocation to various functions</i>	2.	2. Share of market
<i>Details of information, secondary data, or research conducted to develop information discussed in the marketing plan.</i>	3.	3. Distribution expansion
	4.	4. Other
	<b>4.</b>	<b>IV. Marketing Strategy</b>
	1.	A. General marketing strategy
	1.	1. Positioning strategy
	2.	2. Product differentiation strategy
	3.	3. Price/quality differentiation strategy
	4.	4. Mission marketing strategy
	2.	B. Specific market strategies
	1.	1. Target market A
	1.	<i>a.</i> Product
	2.	<i>b.</i> Price
	3.	<i>c.</i> Distribution
	4.	<i>d.</i> Communication
	1.	(1) Personal selling
	2.	(2) Advertising
	3.	(3) Direct marketing
	4.	(4) Sales promotion
	5.	(5) Public relations
	2.	2. Target market B
	1.	<i>a.</i> Product
	2.	<i>b.</i> Price
	3.	<i>c.</i> Distribution
	4.	<i>d.</i> Communication
	1.	(1) Personal selling
	2.	(2) Advertising
	3.	(3) Direct marketing
	4.	(4) Sales promotion
	5.	(5) Public relations
	<b>5.</b>	<b>V. Action Programs (Tactics)</b>
	1.	A. Product plans
	2.	B. Pricing plans
	3.	C. Distribution plans
	4.	D. Communication plans
	1.	1. Sales plan
	2.	2. Advertising plan
	3.	3. Direct marketing plan
	4.	4. Sales promotion plan
	5.	5. Public relations plan
	5.	E. Mission marketing plan
	6.	F. Interactivity plan
	<b>6.</b>	<b>VI. Measurement, Review, and Control</b>
	1.	A. Organizational structure
	2.	B. Methodology for review and evaluation
	3.	C. Interactivity monitoring
	<b>7.</b>	<b>VII. Marketing Budget</b>
	1.	A. Method of allocation
	2.	B. Enumeration of marketing costs by division
	1.	1. New product research
	2.	2. Marketing research
	3.	3. Sales expenses
	4.	4. Advertising, direct marketing, sales promotion, public relations
	<b>8.</b>	<b>VIII. Appendixes</b>
	1.	A. Sales reports
	2.	B. Reports of market research studies
	3.	C. Reprints of journal or magazine articles
	4.	D. Other supporting documents

