

A vertical bar on the left side of the page, composed of a gold section on top and a light blue section on the bottom.

Marketing Plan Builder

A wide, horizontal purple bar that serves as a background for the main title text.

ATB Marketing Plan Builder

A good marketing plan is the first step towards growing any business. ATB's Marketing Plan Builder will help you create a strategy for raising awareness of your business, finding the right customers, and bringing them in the door, too.

Phase 1

Research

Year
Executive summary
Marketing goals
Core brand elements
Brand statements
Target market
Creating a Unique Selling Proposition (USP)
Competition

Phase 2

Strategies

Pricing and positioning strategy
Distribution strategy
Marketing materials
Promotional strategy
Online marketing strategy
Social media strategy
Lead conversion plan
Retention plan
Marketing schedule
Financial projections

Phase 1

Research

The more you know about your own business, the market and the competition, the better your marketing will be. That's why the first step towards effective marketing is research.

YEAR _____

Your marketing plan should be created one year at a time and reviewed every three months to make sure that it's on track.

EXECUTIVE SUMMARY

MARKETING GOALS

1.

2.

3.

4.

5.

CORE BRAND ELEMENTS

BRAND STATEMENTS

TARGET MARKET

Who is your marketing plan aimed at? This is divided into primary and secondary markets.

Primary

The people most likely to buy your products and services right now. They will account for most of your revenue. The more specific your primary market, the better you can target them with marketing. Include the following information:

Secondary

These people are your future primary buyers and those who influence your current primary buyers.

CREATING A UNIQUE SELLING PROPOSITION (USP)

With your target market and brand statements defined, you're ready to create your USP, which is a statement that explains what sets you apart from your competitors.

- 1.
 - 2.
 - 3.

COMPETITION

Who else is trying to market to the same people that you are?

	Competitor	What do they offer?	What is their market share?	Strenghts	Weaknesses
1.					
2.					
3.					
4.					
5.					

ANALYSIS OF TOP COMPETITORS

Detailed analysis of your top two competitors is also helpful. Research the following questions for each competitor:

Phase 2

Strategies

Now that you know your USP and how it relates to the marketplace, you're in a good position to create smart, effective marketing strategies. The following are some proven approaches you can use. They won't all apply equally to every business, but each is worth thinking about.

PRICING AND POSITIONING STRATEGY

DISTRIBUTION STRATEGY

MARKETING MATERIALS

PROMOTIONAL STRATEGY

ONLINE MARKETING STRATEGY

SOCIAL MEDIA STRATEGY

LEAD CONVERSION PLAN

RETENTION PLAN

MARKETING SCHEDULE

Jan	
Feb	
Mar	
Apr	
May	
Jun	
Jul	
Aug	
Sep	
Oct	
Nov	
Dec	

FINANCIAL PROJECTIONS

Include projected costs for all the aspects of this plan. Edit as you need and as you go! Make sure you capture everything to help you track your ROI on your investment.

Project	Start Date	End Date	Projected Cost	Actual Cost
Advertising				
Total Advertising			Budgeted amount	Total amount
Social Media				
Total Advertising			Budgeted amount	Total amount
Total Marketing			Budgeted amount	Total amount

The follow through

Now that you've taken the time to make this plan, it is important to follow through. Who in your business is accountable for executing this strategy? How will you track return on your marketing investments?

Remember: Rome wasn't built in a day. Neither was Google, for that matter. Patience and persistence are some of the most valuable assets for any business owner. If you need more help, check out ATB's Entrepreneur Centre or book an appointment with one of our experts.