

# MARKETING PLANNING GUIDE

- I. Scope                    The geographic areas you cover currently, or plan to cover in the next 12 or 24 months.
- II. Mission                A one sentence statement which describes why the organization exists as related to the customers served. The reason for existence differentiates the organization from other competing organizations.
- III. Vision                A leadership tool which management uses to motivate, excite and create enthusiasm and support for the plan by all employees.
- IV. Situation Analysis    A brief history of the organization, assessment of its current condition and a review of the economic, political or social changes which may, or will, impact the organization and its activities or growth: demographics, international competition, etc.
- V. Assumptions            The economic conditions which you assume will exist during the period covered by the plan: Inflation, plant relocations, technology changes, employment, taxes, etc.
- VI. Objectives            Timed, quantified results which will happen during the plan year or years.
- VII. SWOT                Strengths, weaknesses, opportunities, threats relative to the organization and the competition.
- VIII. Strategy            The actions, plans and programs which the organization implements to secure the objectives stated in the plan. Strategy implies that the organization has the tactical competence to execute the strategies.
- IX. Action Plans         WHO is going to do WHAT by WHEN to assure completion of the objectives.
- X. Financial Forecast    Revenues and expenses anticipated each month to monitor the plan with monthly comparisons of plan versus actual performance throughout the year.
- XI. Marketing Plan      Formulation of the marketing plan for the plan years employing the best combination of the following dynamic elements:
  - a. Products/Services Offered
  - b. Price
  - c. Promotion
  - d. Distribution
  - e. Sales Force
  - f. Warranty
  - g. Credit
  - h. Field Service
  - i. Brand naming
  - j. Packaging

# ACTION PLAN

Objective:

Strategy:

| <u>WHO</u> | <u>WHAT</u> | <u>BY WHEN</u> |
|------------|-------------|----------------|
|            |             |                |