

# A marketing plan checklist

If you are struggling putting together a marketing plan and don't know what elements to include, here's our checklist to help:

## Snapshot of the current situation

- Typically an overview of where you are now, featuring:
  - Your strengths and weaknesses
  - The opportunities and threats on the horizon
  - Your target market and current share
  - Your product/service offerings – take up and profitability
  - The competitive challenges you are facing

## Your objectives

- What you want to achieve (preferably quantified) and by when. For example, your desired market share? turnover/income growth? volume of new clients etc. Our tips:
  - Limit the objectives to no more than three (they'll be more achievable)
  - Each objective should be SMART – specific, measurable, action-focused, realistic for you and set within a time parameter

## Your strategy

- A summary of how the objectives are likely to be achieved. Our tips:
  - This shouldn't go into too much detail
  - It should give a general overview of the strategy to be adopted to achieve each objective – eg. Market development, product/service development, further market penetration, diversification...

## Specific marketing activities

- These are the specific activities that need to be done to achieve the strategy and objectives. Our tip:
  - This section should give more detail on what actions/activities are to be used and what they will involve

## Resources needed

- The time, people, money involved (ie the details of the timeframe expected for each activity, the people responsible and/or involved and budgets to be allocated). Our tip:
  - This is best summarised in a chart or table
  - Don't forget to include how the plan will be communicated internally to secure buy-in (where needed)

## Measurement and review

- This identifies the times and ways in which the plan's progress will be monitored and measured. Our tips:
  - It should include who will be involved in measuring output vs outcome
  - Try to explain what outcomes are expected at which point of the plan's implementation – so everyone has realistic expectations
  - Try and build in a small degree of contingency planning eg. If x happens then we'll adopt y strategy

## The plan's champion (reporting lines)

- For plans that impact across different departments, give brief details of the individuals leading/championing various components of the plan. Our tips:
  - This should clarify reporting lines and responsibilities
  - It is best to have someone senior with overall responsibility for the whole thing and with the authority to challenge any underperformance

## Need more help?

If you can't face the prospect though, we have a wealth of experience in developing marketing plans and would love to help.

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