



## Marketing Plan Worksheet

Business Name \_\_\_\_\_

Your Products and Services

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Describe the types of individuals or businesses you expect to use these services. Include age, gender, income, and other important demographics.

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Indicate when and how often they might need your services. If you aren't sure, ask potential clients and/or existing customers to tell you when they would use what you sell or why they use it now. For existing businesses, also ask customers if there's anything about your products or services they'd like to see changed.

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Describe the benefits your products and services will offer customers (the SPECIFIC problems the product solves or SPECIFIC advantages it offers to the customer)

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How many other services like yours are in your area?

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How will your service differ from your competitors?

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What's your primary competitive edge? What makes you different from (and better than) your competitors? (I.e., industry knowledge, years of experience, customer support, etc.)

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How are you planning to find customers ?  
(Check all that apply)

- Email
- Social media posting
- Social media advertising
- Posting videos on YouTube
- Ads on search engines
- Banner ads or links on websites
- Guest posting on websites
- Using affiliates to promote your products
- Search engine optimization
- Text messaging
- In-App advertising
- Direct mail
- Print Classified ads
- Paid display advertising in newspapers or magazines
- Radio advertising
- TV advertising
- Ads on side of your truck

- \_\_\_\_\_ Door-to-door canvassing
  - \_\_\_\_\_ Cold-call telephone calls
  - \_\_\_\_\_ An ad in the Yellow Pages
  - \_\_\_\_\_ Off-line word-of-mouth advertising
  - \_\_\_\_\_ Network at business meetings
  - \_\_\_\_\_ Giving speeches and seminars
  - \_\_\_\_\_ Window signs to attract walk-in trade
  - \_\_\_\_\_ In-store displays to sell add-on services
  - \_\_\_\_\_ Exhibiting at trade shows
  - \_\_\_\_\_ Responding to RFPs
  - \_\_\_\_\_ Getting on the GSA schedule
  - \_\_\_\_\_ Other (specify)
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How do people hear about this product or service now?  
(Don't guess! Go out and ask potential customers)

- \_\_\_\_\_ Through the mail
  - \_\_\_\_\_ Through the email
  - \_\_\_\_\_ Through the social networks
  - \_\_\_\_\_ By watching online videos or slide shows
  - \_\_\_\_\_ By using online search engines
  - \_\_\_\_\_ By asking their smart phones a question
  - \_\_\_\_\_ By using their smart phone "find nearby" function
  - \_\_\_\_\_ Through other online ads
  - \_\_\_\_\_ Through telemarketers
  - \_\_\_\_\_ Through print ads they see in newspapers, shoppers or magazines
  - \_\_\_\_\_ In the Yellow Pages
  - \_\_\_\_\_ At trade shows\_\_\_\_\_ Through radio or TV ads
  - \_\_\_\_\_ Listening to talk shows
  - \_\_\_\_\_ Through contacts and networking
  - \_\_\_\_\_ By listening to speakers at conferences and seminars
  - \_\_\_\_\_ By attending trade shows
  - \_\_\_\_\_ Through window signs to attract walk-in trade
  - \_\_\_\_\_ Through In-store displays
  - \_\_\_\_\_ Through a bidding process
  - \_\_\_\_\_ Through the GSA schedule
  - \_\_\_\_\_ Through online classified advertising
  - \_\_\_\_\_ Through their diversity outreach division or website\_\_\_\_\_ On Internet Web sites
  - \_\_\_\_\_ Through banner ads on the Internet
  - \_\_\_\_\_ Other (specify)
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Who makes the buying decisions-- a consumer, the actual business user, the purchasing department, department head, other?

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How much money have you allowed for marketing?

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What will it cost you to use each of these marketing methods?

- Email delivery service charges
- Mailings (postage, mailing lists, printed materials, paper & toner, staff time, etc.)
- Broadcast (radio, tv) advertising costs
- In-person sales calls (include gas money)
  
- Staff time or cost of outsourced help for social media networking
- Video production costs
- Photography and artwork cost
- Publicity costs
- Phone calls (including staff time)
- Online advertising
- Print classified ads
- Print display ads
- Yellow Pages
- Network at business meetings (include cost of meetings, if any)
- Window signs to attract walk-in trade
- In-store displays to sell add-on services
- Bidding on jobs
- Other (specify)

Compare your expected methods of finding customers and costs with the ways potential customers have indicated they are most like to look for this type of service. Then decide what steps you need to take to get customers to buy from you. List them below and set target dates for accomplishing each.

Action Item	Start	Follow-up	Estimated	Actual	Results
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