

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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