



## How to write a professional marketing plan in 10 steps?

### Description

Creating a professional marketing plan doesn't need to be a stressful and time-intensive process. By following these 10 simple steps, you will be able to create a full marketing plan that will help you reach your goals. So get started and let your marketing strategy shine! You can [download a marketing plan template](#) here and start direct by creating one.

Before you start, think about why you are creating the marketing plan. *Take 1-3 months to get it properly done.*

### 1. Start with the assignment and choose the form â?? Prepare!

#### Identify the Scope and place of the marketing plan.

Creating a marketing plan requires a good understanding of your organization and the target markets. Ensure that you understand existing [business plans](#), [marketing plans](#), [digital marketing plans](#), research and other relevant materials in relation to the scope of the plan before you start creating it.

Additionally, talk to your manager and stakeholders to check if the marketing plan should also include other organizational domains like service, sales, IT/digital, and human resources. This step will take time and is essential for the success of the plan.

When creating a plan for marketing activities, it is important to consider where it fits in the business structure. The [business plan](#) is typically the highest-level plan, followed by the [marketing plan](#), which guides the [digital marketing plan](#) and the [social media plan](#). Additionally, the marketing plan provides the background information needed to brief any marketing campaigns.

#### Check why this marketing plan is needed.

Having a well-thought-out marketing plan is essential for any business or organization. A marketing plan provides direction and outlines the steps you need to take to reach your

goals. It helps to save time by outlining your strategy and measuring the effectiveness of your efforts. Developing a marketing roadmap will allow you to assess market opportunities, plan your budget, and identify the tactics you need to reach your target audience.

Crafting a sound marketing plan is essential for obtaining the budget and informing the organization. This plan should include identifying and choosing the various options available such as pricepoints, customer segments, media mix, ad spend, etc.

Additionally, creating **a marketing calendar** will provide a timeline for mapping projects and activities. Resource planning should account for the amount of cost and hours per activity as well as creating an FTE map overview of the personnel resources needed for the plan's execution.

At the start of the plan, it is important to include why the plan is necessary. If there is currently no marketing plan in the organization, this new plan can serve as a template and example for future plans.

### **Identify the stakeholders.**

As part of your marketing efforts, it is important to consider the various organizational touchpoints that could feel the impact of your activities. This could include sales, management, colleagues, IT, finance, the service department, HR, investors, logistics, and other departments and suppliers. To start, create a list of all the stakeholders, and prioritize them based on importance. Focus on the three most important ones and incorporate their input into your process to ensure that you have "buy in" from them.

### **Limit the amount of work.**

To complete your task more efficiently, you may want to consider creating a PowerPoint presentation instead of a word document. Excel is also a great tool for creating and managing financial budgets, and for making calculations. Additionally, applying a technique like prioritization can help you determine which activities should be added and removed, while still achieving the desired outcome.

### **Use a shared network drive.**

To review, edit, and share your plan with stakeholders, use a shared drive. This will also be used to store Excel documents, research data, and images. Additionally, you may need to share parts of your plan with suppliers for briefing purposes.

### **Use versioning.**

When creating a plan, it is important to use versioning to track progress. Begin with a "concept 0.1" version and then gradually increase to higher points, such as "version 0.2". When the plan is ready for presentation, it should be labeled "1.0". If any changes are made afterwards, the version should be changed to "1.1". If a new plan is created after the previous one, the version should be changed to reflect the new year.

### **Choose the form: Powerpoint vs Word document?**

Tip: work with powerpoint, this will save you a lot of time, instead of writing a full document. A written document however is more readable and still holds some value after 1 year, however this will take you 2-3x more time to write.

Also a powerpoint is more read and shared in the organization, than a written down marketing plan in a document. A written marketing plan however is very helpful when briefing agencies and suppliers, or documenting the activities for marketing later.

Sometimes you need both, but we think a powerpoint is faster (and a bit more shallow). If you have the time create a written document, as after one year there will be still items that are valid for marketing. Perhaps for your coworkers who have just started in marketing. This provides fast onboarding context for new colleagues.

### **Use excel for creating the marketing budget.**

Use excel for calculation the values. (sizing the market, calculating margins, determining the marketing budget, recalculation the lead values, goal setting, etc.). You need this to [calculate the marketing budget](#), check the kpi's of your document and create an **outline for a marketing planning** and start how to reach while calculating marketing goals.

### **Levels of the marketing plan**

You can have different levels of the marketing plan : Strategic Marketing: high level, choosing channels, goal setting. Tactical Marketing: teams, organization, campaigns. Operational Marketing: actions, activities, writing content, promotions, running events, executing projects. Work from big (conceptual) to small (execution elements). Short term, long term. Year plan (1 year) or strategic plan (3 years)?

### ***How much time will it take to write a marketing plan?***

**Take 2-3 months time** to create and align a marketing plan. Yes. That's is a lot. We have been at it multiple times. Plan at least 50-70 work hours of your (and others) time. You'll need to analyze, gather information, set it up, check with others (and wait for them), recheck data, copy pasting content, creating the document, review it, align it, finding budget for this, negotiating the budget (again), rechecking some calculations, prioritizing some tasks/projects, scaling down your plan and present it multiple times, tweaking it and then going for execution. And then change it a bit ;), So be aware of many changes during the time you create the marketing plan. Tip: You can speed up this process if you inform the stakeholder 2-3 weeks in advance and add 1-2 reminders for providing feedback in their calendars.

### **Managing the timelines.**

Framing the assignment, limiting scope, getting the buyin, managing the timeline. Use quarters and month for a first rough timeline check. You should really start by prioritizing importance of the elements. Use milestones/deliverables for mentioning when something is done. Later, you can finetune the planning. A planning is needed to check if it feaseable. Try to assess, how much time every action takes (roughly), and get to a personnel and resource

planning.

### **Action planning.**

So now you are ready to start mapping and analyzing the situation. You can easily start with what happens outside of the business, that impacts the business. Yes, the market!

### **Use a set of relevant business models.**

Before you start, have a few business models and [business concepts](#) at the ready to fill in, together with your customer insights. This helps a lot for quick communication later and builds a marketing framework for your plan. Helpful business models are: [SWOT analysis](#), [Business model canvas](#), [DESTEP trend analysis](#), Distribution analysis, .. etc.

*So now you can start with gathering information â??!*

Try to get as much relevant information as you can from different sources as possible. Search for (=desk research) Interviews, magazines, old publications, annual reports of the organization, annual reports from competitors, websites, competitor websites, old research, customer reviews on sites, more interviews with sales, screenshots from competitors campaigns, service, intranets, other powerpoints, etc. Put them on the shared network drive.

Use sources, like â??source: website abc + link to articleâ?? if you use websites for reference. This helps a lot later in firming your findings. Also you add credibility by quoting sources. After 3 points/sources from different areas on the same subject, you will get a feel of whatâ??s happening and you start seeing the same patterns emerging.

Setting up the framework. A marketing plan is designed to plan the marketing activities and additionally provide background for the situation and marketing and business choices made. You could also see it as â??a business proposalâ??, which is not final after management approves it and signoff and you can start building your marketing activities.

### ***Which elements should be in a professional marketing plan?***

These elements should be at minimum in a marketing plan

1. Why do this marketing plan + who to approve it
2. External environment (lots of research here)
  1. The customer/market
  2. Competition
  3. Trends
3. Internal environment (lots of research here)
  1. The brand
  2. organization etc.
4. SWOT / Issues to address (priority setting)
5. Goal setting (priority setting)
6. Strategy / approach (how to reach the goals)
7. Action plan & calendar (most used in practice)

8. Budget & cost (financial discussions, expect lots of discussions here)
9. Organization (can you deliver with this organisation, are there IT issues, etc.?)
10. Data appendix

## 2. Start by mapping the external environment

- Do a Trend analysis â?? [how to create a trend analysis?](#)
- Market sizing, spending details,
- Market growth / market phase
- Market assessment (growth, industry) â?? interesting / competitive structure / industry structure
- Direct / generic Competitor evaluation / intensity

*The Customer. Use a separate chapter for this.*

This is the core of marketing. Know your customer. (and give them what they want). Try to find all things you can find on the/your customer. Gather as many stuff you can find. This will really build up in time. Ask Service, find a willing sales person to interview, ask direct customers by phone, do research yourself, research online comments and find reviews and posts on social media. Use google analytics (demographics), find order data, Find triggers, find how much they are willing to spend on your product. Where do they live. What do they think is important? (for later: how does your business offer fit in their needs = matching).

Find general market dynamics, sizes, elements, persona design, direct indirect customer, write as much you can gather. Think in demographics (general age/gender/location), firmographics (if you are targeting business), psychographics (style, price sensitivity), socio-economics (income levels, expenses, share of wallet, affluence), behavioral (order history, loyalty) but also in context as your service is integrated in their lives. Try to write a story on this, how the consumer uses your product/service and what value it has. (functional, emotional, etc.)

Use Google search for keywords, dig into google analytics, use quotes from service, check from other marketeers, use general market research, try to get something from old surveys, use facebook groups, etc. find keywords they trigger on, create a persona for your ideal customer and verify this 2 times with service and sales. Use also website statistics. and government statistics agencies in general. Mix it. Customers are markets when aggregated.

Helpful business models: Osterwalder, pains- gains analysis, [persona document, customer surveys](#)

## 3. Mapping the internal environment

- About the company
- Company vision / mission / why
  - Find out the company vision /mission and the why of the organization. If itâ??s not there, first create one yourself, then ask the manager to review it. (This starts an interesting conversation â??! and will trigger a lot of things).

- You need this for the framework and boundary of the marketing plan.
- This will also take you to the potential future of the organization
  - What business are we in? Mobility, repairs, hospitality, indulgence, practicality, caring, etc.?
    - Define it at first roughly, then after a few internal interviews this becomes more clear. This can be very abstract. Say if you are mobile phone shop, you are in the business to facilitate communication, and if you offer mobile phone repairs, you help support people using the communication devices. Try to word this in an abstract manner.
  - Company evaluation / history of the company / structure â?? about the company
    - Historic achievements and highlights preferably in a timeline
  - Current promotional situation (making screenshots of activities)
  - Hereâ??s the moment: in doing this you will notice gaps between your ideas and the business reality. Start by writing your ideas down in a list, perhaps you can use these later in the action planning.
- The Brand (Values, logo, history, brand values,) & positioning in the markets, differentiators, blue ocean mapping. Use a few brand models to place brands and map the positioning for your business/products/services.
  - Organizational difficulties, risks or enablers: write them down in advance (these are pitfalls), perhaps it is: slow IT systems (ERP perhaps), limited budgets, too little time for things, too inert organization, or too much adhoc things going on, difficult management, or even no management time & guidance, or perhaps a fast company culture with sprints, great service and fast product development. List the elements that come to mind. Choose the strengths (perhaps executing small things could be easy), and work around the difficulties (for example management has no attention) and address them.

#### **4. SWOT analysis â?? what to go for â?? this limits the scope /making decisions**

- Which markets to play?
- Which problems to address?
- Which strength to leverage, what not to do?
- Prioritize projects, making choices â?? this helps to give you focus, otherwise marketing will be all over the place. Limit to 3-5 major projects, and divide time later between projects, running business, content creation/promotional activities

#### **5. Goal setting / KPI setting â?? target setting**

- Use a metrics framework, define your goals smart, break down goals in projects and actions.
- You could use this book (marketing metrics) to have a full view of all the marketing metrics. We advise pick maximum of 3. (for example: Revenue, Reach, Satisfaction), and then detailing these elements with subsets.

## 6. Marketing Strategy – how to reach the goals

- Old school strategies: product leadership, customer intimacy, cost focus
- Choosing channels
  - Industry structure
  - Sales approaches
  - Mixed approach
    - Returning customers, expanding current base, lost customers, new customers
- Growth tactics (email cycles, community, referrer builds)
- How to approach markets (soft launch, big bang, partner, direct)
- Price points & positioning
- Choosing marketing tactics
  - Advertising
  - Sales
  - Promotions
  - Content + content formats
  - Continued product development (product leadership)
  - Service
  - Digital + offline is the mix?
  - Product development
    - Creating Business offers / propositions
  - Channel choosing
  - Marketing tactics choosing

This fluently becomes the action planning

## 7. Action Overview (managing scope)

- Prioritize set of actions
- Create a marketing calendar ([find one here](#))
- List the larger projects, for example
  - Implementing CRM & privacy implementation
  - Implementation Personalization, Recommendation engines
  - Digitization
  - New website
  - New brand / rebranding project
  - Creating marketing collateral for example a catalogue
  - New marketing/promotional campaign
  - Large events
  - Opening of new store
  - Implementation of new tools
  - Training of crew
  - Customer research project
  - Support new product development
- List the continual actions

- Social content creation
- Running activities
- Reporting
- Customer interactions with service
- Financial paperwork every month (administrative)
- Website management
- Content creation
  - Video content
  - Content cycle
  - Content formats
  - Content creation team / content subjects / social media use
  - Community building / selecting channels
- Marketing Roadmap
  - CRM / customer centricness
  - Product development roadmap
  - Marketing organization
  - Hiring of team
  - Budget / resources
- Service organization alignment
- Sales organization alignment
- IT organization alignment
- Logistics / Production alignment
- Marketing Calender

Try to add hours to these activities (per month) and check estimates of resources / times at first. Then you will create an overview of how much time each elements cost, and then it becomes a planning document with a full marketing overview,

This you can use to spar with management later and use for your self to check progress and have the full overview yourself when you are immersed in day to day activities.

## 8. Engaging the Team and Organization to deliver results

- Get feedback on can the tasks be achieved
- Check with stakeholders
- Take special care to check your marketing team and inform the organization. Now you can use your stakeholder list.
- Take special care of the salesforce, they will often not use your campaigns, but will use pricelists and sales promotions with their clients. Be firm.
- your team will deliver results on execution. This can be your co workers, interns, colleagues, managers, suppliers, and even technology partners. Leverage their skills and work time. You cannot do it alone, it takes too much effort, and you need to split tasks to manage the work load.
- HR requirements
- Team structure
- Training the team
- Working with suppliers

## Handling the 'make or buy' decisions

Make or buy decision making. Sometimes you will need agencies or suppliers to get things done. Sometimes they work faster than your own organization. Perhaps you need a website builder, software supplier, copywriter or a CRM supplier. Or even you might need extra resources or additional freelancers outside the company to make social media work better.

Check if you can do it within your own organization, or if you need to outsource it. Or together (most used). Try to assess the time needed, and then decide to outsource or do it yourself.

## 9. Financials / The Budget 'how to create the marketing budget?

You need a marketing budget to do stuff. If you have 0 budget, it's still your own working time and your coworkers. Try to estimate how much hours/effort/budget you need to create the action plan and deliver the results.

### *What is the average marketing budget for a company?*

- Normally 3-10% of revenue

Or you can start also the other way, how much marketing budget there is, what can I make do with it that makes the most impact and deliver some of the results.

Or you can go for a market penetration rule of 5-10% of salesvalue to create a proper marketing budget. And you can do a Cost per Customer Acquisition spend to aggregate and then build your plan.

- Pro tip: Try this: With this extra budget (on top of existing marketing plan) I can get x results faster/ earlier (show this in the calculation)

Building your marketing budget takes time and some numbers to create one. Use the financial department to help you with calculating, (and yes they will *like* this as they are numbers people), this also ensures a bit of grounding in business reality and some buy in for the financial expenditure later.

## Map the financials

Make friends with your internal accountant and CFO if possible, it is a life saver later on, when you are in need of budget or you get additional invoices, or even if you save money on the marketing budget. Try to get this information:

- Optional Profit and Loss (P&L) for marketing
- Financial Lead calculation
- Customer Lifetime Value calculation
- Cost per Acquisition
- Cost per Retention

Then you can calculate your own commercial elements. You can recheck these with your financial expert, he/she will like you for it.

### ***How to calculate the best marketing budget?***

- *How to create a marketing budget? How much should I spend for market entry?*
- Think of the marketing budget as a business proposal. You need to sell it. Only after signoff, you can work with this. And then it can change. Also try to get the financials committed and spend in advance, to save your internal approval hassle. Reserve 10% of your budget for unforeseen issues and new opportunities in the year. Cashflow planning will become easier for this, and now you can work with finance better together.

After you have created the action overview, you will notice that it will cost too much. too much time, effort and spending. You need to scale down and make choices. Start to simplify and work with the rule of 3.

## **10. Reporting: Marketing Metrics for KPI deck creation**

- Important. Do it. And then again. Use first the major metrics, then use the smaller ones to check if you are moving in the right direction. Some metrics are available only on daily bases, others only monthly, once per quarter (for example customer surveys), or even yearly (for example financial results).
- You can connect reporting together with some Business Intelligence tools. or even start simple: with customers acquisition numbers and revenue divided by number of customers.

## **11. Managing Risks & Mitigation**

- Technical risk (tools too difficult)
- Organizational risk (no budget), (no crew)
- Legal risk (promotions not allowed, privacy constraints, )
- Tax risks (selling in other countries)
- Project risk (timelines, etc.)

## **12. Partnerships & Alliances â?? how to build alliances**

Partnerships enhances the business by cooperating in areas you need extra support in. Media, knowledge, IT, sales, supplier, finance. Managing alliances is difficult, but rewarding. It also helps to builds scale faster. You lose a bit of control though. Read more on managing partnerships here. We live in a networked world and your marketing is not done in isolation. Think of the help you could get executing parts of your marketing activities working with partners.

## **13. Technology & IT â?? Leverage**

Technology is an enabler for your marketing activities, SEA, seo, email marketing, crm, lots of tooling out there and they change fast. This marketing technology stack you should also address in your marketing plan. Technology can make your marketing perform better (like conversion optimization), make it easier (better software makes work easier) or worse (a slow CRM). Map the overview and have a plan for this together with IT.

Note: investors/stakeholders. Technology mapping. Map your marketing technology tools visually to get a good overview for IT. It also allows for viewing, how the tools are integrated and if you are missing something in your marketing toolstack.

Operational tip *Integrate business planning in a project planning tool*

Try this plan and framework in Husky / work in [Monday plannings format](#) (insert this template into Husky / Monday and start working your marketing planning!

## Getting The Marketing Plan buyin & marketing support.

First ask for advice /and feedback on the plan, before presenting it. This helps strongly in adopting and execution of parts of the plans.

So after a few weeks tinkering with your plan and ideas you now have come up with a sort of a plan. Try to decrease the moving parts, by firming the goals of the plan (essential). Start pruning it a little and condense it.

*Marketing pro tip: if you give me extra x budget for y, I can deliver this and that z faster, or more.*

## After the presentation, then what?

Congratulations on completing your presentation! Now you can enjoy the feeling of accomplishment while you rest. Stakeholders are now informed and your budget is probably secured. This is a great foundation for your future marketing activities. Now you can move on to execution: contacting agencies, creating content, setting up new martech, and more.

In a few months, you can add progress and renewed insights. The next year, this plan will become even smoother. **Marketing planning** should be an ongoing part of every successful organization.

*We wish you the best of luck!*

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Check out these ready made templates to get you going even better and faster:

- [Marketing Plan Template](#) (a ready made framework for creating a marketing plan)
- [Online Marketing Plan Template](#) (for digital only, a subset of marketing plan)
- [Online Marketing Checklist](#) (check out the parts of the digital activities)
- [Social Media Plan Template](#) (a subset of marketing/digital marketing plan designed for socials)

- [Brand Checklist](#) (when you start developing and improving your brand you can use this framework)

### Category

1. Marketing
2. Business Concepts
3. Business Idea
4. Business Strategy

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