

# Marketing plan template and guide

## **business.gov.au**

A good marketing plan helps you identify your customers and competitors and develop a strategy to make your business stand out. The business.gov.au Marketing Plan template steps you through the process of creating a solid, well-structured plan tailored to your business.

Copies of the latest version of this template and guide can be downloaded from [www.business.gov.au/plans](http://www.business.gov.au/plans).

If you need further information, assistance or referral about a business issue, please contact business.gov.au on 13 28 46.



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## How to use this template

Before you complete this marketing plan template and start using it, consider the following:

1. **Do your research.** You will need to make quite a few decisions about your business including structure, marketing strategies and finances before you can complete the template. By having the right information to hand you also can be more accurate in your forecasts and analysis.
2. **Determine who the plan is for.** Does it have more than one purpose? Will it be used internally or will third parties be involved? Deciding the purpose of the plan can help you target your answers. If third parties are involved, find out what are they interested in.
3. **Do not attempt to fill in the template from start to finish.** First decide which sections are relevant for your business and set aside the sections that don't apply. You can always go back to the other sections later.
4. **Use the *[italicised text]*.** The italicised text is there to help guide you by providing some more detailed questions you may like to answer when preparing your response. **Please note:** If a question does not apply to your circumstances it can be ignored.
5. **Use the marketing plan guide.** The marketing plan guide below contains general advice on marketing planning and a complete overview with details on each question asked in the marketing plan template.
6. **Get some help.** If you aren't confident in completing the plan yourself, you can enlist the help of a professional (i.e. Business Enterprise Centre, business adviser or accountant) to look through your plan and provide you with advice.
7. **Write your summary last.** Use as few words as possible. You want to get to the point but not overlook important facts. This is your opportunity to sell yourself. But don't overdo it. You want third parties to quickly read your plan, find it realistic and be motivated by what they read.
8. **Review. Review. Review.** Your marketing plan is there to make a good impression. Errors will only detract from your professional image. So ask a number of impartial people to proofread your final plan.
9. **Print.** Before you print a copy of your completed marketing plan, ensure you delete the first section containing the guide as well as the *[italicised text]*. To print a copy, select the Printer icon on the toolbar, or select File then Print on the main menu.

# Marketing plan guide

## Marketing planning

A marketing plan assists you to integrate your total marketing effort. It ensures a systematic approach to developing products and services to meet and satisfy your customers' needs.

When you're writing a marketing plan you need to be clear about your objectives and how you'll achieve them. A good marketing plan sets clear, realistic and measurable objectives, includes deadlines, provides a budget and allocates responsibilities. A plan can consist of these elements:

- analysis of your current market
- your business objectives
- key strategies
- steps to achieving your objectives
- proposed budget
- timing.

Remember that your marketing plan should remain an ongoing process throughout the life of your business.

### **What to do...**

- Contact your nearest [Business Enterprise Centre \(BEC\)](#)  for free advice and support.
- Check if your local BEC or state business agency hosts a marketing planning workshop near you.
- Search for networking, mentoring or training events and seminars on the business.gov.au [Event Finder](#).
- Contact a business adviser, accountant or solicitor for advice.

## Regular review

Marketing planning is an ongoing business activity. As your business changes many of the strategies in your plan will need to evolve to ensure your business is still heading in the right direction. Having your plan up to date can keep you focussed on where you are heading and ensure you are ready when you need it again.

## Advice & support

There are a number of government services available to help you plan, start or grow your business. These services can provide general advice, workshops, seminars and networking events, and can even match you with a mentor or business coach.

### **Attending business events**


Small business workshops and seminars are run regularly in most areas of Australia, and deal with issues such as planning, marketing, innovation, employing staff and exporting.

You may also find it useful to attend networking events to help expand your business. By developing networks, you can keep up to date on industry and local information, promote your business through new contacts and learn key skills from other businesses.

### **Taking on a mentor or business coach**

Participating in mentoring or coaching programs can help you develop a greater understanding of business processes and practices, and equip you with the skills you need to grow and improve your business.

#### ***What to do...***

- Contact your nearest [Business Enterprise Centre \(BEC\)](#)  for assistance with your planning process.
- Check if your local BEC or state business agency hosts a marketing workshop near you.
- Search for networking, mentoring or training events and seminars on the business.gov.au [Events and training](#) search.
- Contact a business adviser, accountant or solicitor for advice.

## Template overview

This template overview provides details on each question asked throughout the marketing plan template as well as links to further information. When you start answering a question in your marketing plan, you can refer to the relevant question below to help guide your answer.

### Title page

Question/Field	Explanation	More information
<b>Insert business logo</b>	Adding a logo gives a more professional image.	—
<b>Your name</b>	Enter the business owner's name. Enter multiple names if there are multiple owners.	—
<b>Your title</b>	The titles of the business owner(s) listed above, e.g. Owner/Manager.	—
<b>Business name</b>	Enter your business name as registered in your state/territory.	Visit our <a href="#">Register your business name</a> page.
<b>Main business address</b>	Enter your main business address. This can be your home address if you are a home-based business or your head office if you have more than one location.	—
<b>ABN</b>	Enter your Australian Business Number. If you are a business and have registered for an ABN enter it here.	Visit our <a href="#">Register for an Australian Business Number (ABN)</a> page.
<b>ACN</b>	Enter your Australian Company Number. Only fill this in if you are a company.	Visit our <a href="#">Register your company</a> page.
<b>Prepared</b>	The date you finished preparing your Succession plan.	—

Question/Field	Explanation	More information
<b>Table of Contents</b>	If you have changed this template in any way, please remember to update the table of contents to reflect the changes.	—

## Marketing plan summary

Your marketing summary should be no longer than a page and should focus on why your business is going to be successful. Your answers should briefly summarise your more detailed answers provided throughout the body of your plan.

### The Business

Question	Explanation	More information
<b>Business name</b>	Enter your business name as registered in your state/territory. If you have not registered your business name, add your proposed business name.	Visit our <a href="#">Register your business name</a> page.
<b>Business structure</b>	Is your business a sole trader, partnership, trust or company?	Visit our <a href="#">Business structures</a> topic.
<b>ABN</b>	Enter your Australian Business Number (ABN). If you are a business and have registered for an ABN enter it here.	Visit our <a href="#">Register for an Australian Business Number (ABN)</a> page.
<b>ACN</b>	Enter your Australian Company Number (ACN). Only fill this in if you are a company.	Visit our <a href="#">Register your company</a> page.
<b>Business location</b>	Enter your main business location such as your city/town. Briefly describe the location and space occupied/required.	—
<b>Date established</b>	The date you started trading. Whether it was the date you opened your doors or the date your purchased business opened its doors.	—

Question	Explanation	More information
<b>Business owner(s)</b>	List the names of all business owners.	—
<b>Relevant owner experience</b>	Briefly outline your experience and/or years in the industry and any major achievements/awards.	Visit our <a href="#">Prepare yourself for business</a> page.
<b>Products/services</b>	What products/services are you selling? What is the anticipated demand for your products/services? These answers should briefly summarise your answers under the main products/services section.	—

### The Future

Question	Explanation	More information
<b>Vision statement</b>	The vision statement briefly outlines your future plan for the business. It should state clearly what your overall goals for the business are. To keep it brief you may prefer to use dot points in your summary.	—
<b>Goals/objectives</b>	What are your short and long term goals? What activities will you undertake to meet them?	—

### The Market

Question	Explanation	More information
<b>Target market</b>	Who are you selling to? Why would they buy your products/services over others?  This answer should briefly summarise your answers under the main Market section.	Visit our <a href="#">Researching your market</a> page.

Question	Explanation	More information
<b>Marketing strategy</b>	<p>How do you plan to enter the market? How do you intend to attract customers? How and why will this work?</p> <p>This answer should briefly summarise your answers under the main Market section.</p>	Visit our <a href="#">Marketing</a> topic.

## The Finances

Question	Explanation	More information
<b>The finances</b>	<p>Briefly outline your sales forecast. How much money will you need up-front? Where will you obtain these funds? What portion will you be seeking from other sources? How much of your own money are you contributing towards the business?</p> <p>Your answers can be quite brief in the summary. They should give the reader a quick idea of your current financial position. Where you are heading financially and how much you need to get there. You can provide more detail in the main Finances section.</p>	Visit our <a href="#">Finance</a> topic.

## The Business

### Business overview

Question	Explanation	More information
<b>Business overview</b>	Who are the current business owners? What does the business do/sell? Where it is located? How long has it been operating?	—




**S.W.O.T. analysis**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>S.W.O.T. analysis table</b>	<p>List each of your businesses Strengths, Weaknesses, Opportunities or Threats (S.W.O.T) in the table supplied. For example:</p> <ul style="list-style-type: none"> <li>• <b>Strengths:</b> (e.g. experience in the industry).</li> <li>• <b>Weakness:</b> (e.g. location of your business).</li> <li>• <b>Opportunity:</b> (e.g. new export opportunity available).</li> <li>• <b>Threat:</b> (e.g. new competitor entering the market).</li> </ul>	—
<b>S.W.O.T. activity sheet</b>	List each weakness/threat, the activities you will undertake to reduce/address each and the date of expected completion.	—

**Product/services**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Product/services table</b>	List each product/service your business currently offers. Provide a description and unit price (including GST) amount for each.	—
<b>Market position</b>	Where do your products/services fit in the market? Are they high-end, competitive or a low-cost alternative to the products/services offered by your competitors? How does this compare to your competitors?	—
<b>Unique selling position</b>	How will your products/services succeed in the market where others may have failed? What gives your products/services a distinctive edge?	—

Question	Explanation	More information
<b>Anticipated demand</b>	What is the anticipated quantity of products/services your customers are likely to purchase? For example, how much will an individual customer buy in 6 months or 12 months?	—
<b>Pricing strategy</b>	<p>Do you have a particular pricing strategy? Why have you chosen this strategy?</p> <p>To help you develop your pricing strategy, you could refer to your customer research, market position, anticipated demand and costs/expenses to get an idea.</p> <p>Whatever strategy you use when setting your price, you will also need to adhere to any relevant fair trading legislation or codes of conduct.</p>	Visit our <a href="#">Fair trading laws</a> page for your state fair trading office contact details.
<b>Value to customer</b>	How do your customers value your products/services? Are they a necessity, luxury or something in between?	—
<b>Growth potential</b>	<p>What is the anticipated percentage growth of the product in the future? What will drive this growth?</p> <p>To help you determine this growth potential, you could refer to your region/industry research to get an idea of any industry/regional growth that could affect your business in a positive way. You could also look up any social trends that may have a positive affect on your business.</p>	Download the <a href="#">Social Trends</a>  series from the Australian Bureau of Statistics website.

**Sales/marketing personnel**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Sales/marketing personnel table</b>	List your current staff in the table provided. Outline each job title, name of the employee in the position and the main responsibilities related to the position. You may also like to attach a copy of their resume to the back of your plan.	Visit our <a href="#">Hiring</a> topic.

**The Future**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Vision statement</b>	What is your business' vision statement? It should briefly outline your future plan for the business and include your overall goals.	—
<b>Mission statement</b>	What is your business' mission statement (i.e. how will you achieve your vision)?	—
<b>Goals/objectives</b>	What are your short & long term goals? What activities will you undertake to meet them?	—

**The Market**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Unique selling position</b>	How is your business unique in the market? What differentiates your product/service from others in the market? What makes your business stand out from your competition? What product gap or service need does it fill for your customers?	—


**Your customers/clients**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Customer demographics</b>	Define who your target customers are and how they behave. You can include age, gender, social status, education and attitudes. What are their lifestyles, activities, values, needs, interests or opinions? Where are they located?	Download the <a href="#">Social Trends</a> series from the Australian Bureau of Statistics website.
<b>Key customers</b>	Identify your key customers. (These can be large consumers of your products or individuals whose satisfaction is key to the success of your business.) How will you target your products/service to them? How will you deliver your product/service to them?	—
<b>Customer management</b>	How will you maintain a good relationship with your customers? What techniques will you use? How will you keep your customers coming back? Have you introduced customer service standards? Do you follow any particular code of practice?	Visit our <a href="#">Customers</a> page. Visit our <a href="#">Codes of Practice</a> page.

**Your competitors**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Your competitors</b>	How do you rate against your competitors? How can your business improve on what they offer?	—

Question	Explanation	More information
<b>Competitor details table</b>	<p>List at least 5 competitors in the table. For each competitor enter:</p> <ul style="list-style-type: none"> <li>• <b>Competitor:</b> Competitor name.</li> <li>• <b>Established date:</b> When were they established?</li> <li>• <b>Size:</b> Number of staff and/or turnover.</li> <li>• <b>Market share (%):</b> Estimated percentage of market share.</li> <li>• <b>Value to customers:</b> Unique value to customers. Why they would do business with your competitor? For example: convenience, quality, price or service?</li> <li>• <b>Strengths:</b> What are your competitor's main strengths?</li> <li>• <b>Weaknesses:</b> What are your competitor's main weaknesses?</li> </ul>	—
<b>Market research</b>	<p>What statistical research have you completed to help you analyse your market? Did you use a survey/questionnaire? If so, you may like to attach a copy of your survey/questionnaire to the back of this plan.</p>	<p>Visit our <a href="#">Researching your market</a> page.</p>
<b>Market targets</b>	<p>Outline your planned sales targets. These targets need to be realistic and achievable. What quantity of your products/services do you plan to sell in a planned timeframe? Are they monthly or yearly targets? For example, you may set yourself a goal of selling 1 000 products in 12 months.</p>	—

Question	Explanation	More information
<p><b>Environmental/industry analysis</b></p>	<p>Detail the results of the market research you have performed. Is the area experiencing population growth? Are there long-term employers in the area? Is the region's economy stable? Are there seasonal variations?</p> <p>What is the size of the market? What recent trends have emerged in the market? What growth potential is available and where do you fit in? How will the market/customers change when you enter the market? What external factors will affect your customers?</p> <p>A good place to start when researching your regional profile is the Australian Bureau of Statistics website. The regional profile information includes economy, population/people, industry and environment/energy statistics.</p>	<p>Visit our <a href="#">Market research</a> topic.</p> <p>Visit the Australian Bureau of Statistics <a href="#">National Regional Profile</a>  page.</p>
<p><b>Marketing strategy</b></p>	<p>What is your overall marketing strategy? What steps or activities will you undertake to achieve your goals/objectives? For each marketing activity/milestone:</p> <p>Marketing activity/milestone: Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.</p> <p>Person responsible: Who is responsible for completing this task?</p> <p>Date of expected completion: When do you expect to complete the marketing activity?</p> <p>Cost (\$): Estimated cost of activity.</p> <p>Success indicator: What indicator/ measurement result will need to be met before this activity is considered a success?</p>	<p>Visit our <a href="#">Marketing</a> topic.</p>

**Advertising & sales**

<b>Question</b>	<b>Explanation</b>	<b>More information</b>
<b>Advertising and promotional strategy table</b>	<p>For each promotion/advertising:</p> <ul style="list-style-type: none"> <li>• <b>Planned promotion/advertising type:</b> What is the promotion/advertising type being used (e.g. Print media advertising, online advertising, SMS, mail-out, giveaway, media release, social media campaign or event)?</li> <li>• <b>Promotional strategy:</b> Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this? Who will upkeep your social media presence?</li> <li>• <b>Expected business improvement:</b> How do you expect it will improve your business success?</li> <li>• <b>Cost (\$):</b> What is the cost of each planned activity?</li> <li>• <b>Target date:</b> When do you expect to complete each activity?</li> </ul>	Visit our <a href="#">Marketing</a> topic.
<b>Social media strategy</b>	What do you want to achieve/communicate (brand awareness, online sales etc)? What social media tools do your customers use (e.g. Blogs, Twitter, Facebook etc)? What strategies can you use to network and communicate effectively with these customers? Who will upkeep your social media presence? Do you have internal staff or would you need to engage an external organisation?	—
<b>Sales strategy</b>	What sales techniques do you use? What are your strategies behind these techniques? How is this different/better than your competitors?	Visit our <a href="#">Marketing</a> topic.

Question	Explanation	More information
<b>Sales and distribution channels table</b>	<p>For each channel enter:</p> <ul style="list-style-type: none"> <li>• <b>Channel type:</b> What channel will you be using (e.g. Shopfront, internet, direct mail, export or wholesale)?.</li> <li>• <b>Products/services:</b> List all the products/services sold via this channel.</li> <li>• <b>Percentage of sales:</b> What percentage of overall sales do you expect to sell via this channel?</li> <li>• <b>Distribution strategy:</b> Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?</li> </ul>	<p>—</p>



## The Finances

To complete the finances portion of this marketing plan, you should rely heavily on your financial statements and projections. The business.gov.au Business plan template available at [www.business.gov.au/businessplan](http://www.business.gov.au/businessplan) can provide you with a start-up costing, balance sheet profit and loss, cash flow and a break-even analysis template.

Question	Explanation	More information
<b>Price</b>	What price have you determined for your products/services? Does this price take into account all your costs including personal, start-up, operational, cash flow and working capital? Have you also allocated a profit margin in your costing? What price will your target market bear? Do your prices take into account any seasonal variation to your suppliers' costs?	—
<b>Expected sales</b>	What are your expected sales? When do you hope to achieve these figures? Are there seasonal influences?	—
<b>Marketing budget [YEAR] table</b>	<p><b>Using the table</b></p> <p>The marketing budget table example contains a list of suggested marketing items a typical business may use.</p> <p><b>Please note:</b> The table assumes all figures are GST inclusive.</p> <p><b>Attach your own</b></p> <p>If you have your own marketing budget or your accountant has already prepared one, please attach it here. If it is a large sheet, you can always attach it to the back of the plan and make reference to it from this section.</p>	—

## Monitoring/measurement activities

Question	Explanation	More information
<b>Monitoring/measurement activities table</b>	<p>Reviewing the impact of your marketing should be a periodic activity. List the details of each review in the table provided. For each marketing activity:</p> <ul style="list-style-type: none"> <li>• <b>Marketing activity:</b> Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social networking, public relations, branding and artwork, or publications and catalogues.</li> <li>• <b>Date of review:</b> (e.g. Month/Year or 6 monthly).</li> <li>• <b>Monitoring methods:</b> What tools did you use to measure/monitor the impact of your marketing activities?</li> <li>• <b>Review outcomes:</b> What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many visitors to your website?</li> </ul>	—

## Supporting documentation

Question	Explanation	More information
<b>Supporting documentation</b>	List all of your attachments here. These may include resumes, customer survey/questionnaire and/or financial documents.	—

**[INSERT YOUR BUSINESS LOGO]**

[Your Name]

[Your Title]

[Business Name]

[Main Business Address]

**ABN:** [ABN]

**ACN:** [ACN]

[Business Name]

# Marketing Plan

**Prepared:** [Date prepared]

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# Marketing Plan Summary

**[Please complete this page last]**

*[Your marketing summary should be completed last and should be no longer than a page focussing on why your business is going to be successful. Your answers below should briefly summarise your more detailed answers provided throughout the body of this plan.]*

## The Business

**Business name:** *[Enter your business name as registered in your state/territory. If you have not registered your business name, add your proposed business name.]*

**Business structure:** *[Sole trader, partnership, trust, company.]*

**ABN:** *[Registered Australian Business Number.]*

**ACN:** *[Registered Australian Company Number, if applicable.]*

**Business location:** *[Main business location]*

**Date established:** *[The date you started trading.]*

**Business owner(s):** *[List all of the business owners.]*

**Relevant owner experience:** *[Briefly outline your experience and/or years in the industry and any major achievements/awards.]*

**Products/services:** *[What products/services are you selling? What is the anticipated demand for your products/services?]*

## The Future

**Vision statement:**

*[The vision statement briefly outlines your future plan for the business. It should state clearly what your overall goals for the business are.]*

**Goals/objectives:**

*[What are your short and long term goals? What activities will you undertake to meet them?]*

## The Market

**Target market:**

*[Who are you selling to? Why would they buy your products/services over others?]*

**Marketing strategy:**

*[How do you plan to enter the market? How do you intend to attract customers? How and why will this work?]*

## The Finances

[Briefly outline your sales forecast. How much money will you need up-front? Where will you obtain these funds from? What portion of funds will you be seeking from other sources? How much of your own money are you contributing towards the business?]

## The Business

### Business overview

[Who are the current business owners? What products/services does the business provide? Where it is located? How long has it been operating?]

### S.W.O.T. analysis

[List each of your businesses Strengths, Weaknesses, Opportunities or Threats (S.W.O.T.) in the table below.]

<b>Strengths</b>	<b>Weaknesses</b>
[e.g High traffic location]	[e.g High rental costs]

<b>Opportunities</b>	<b>Threats</b>
[e.g build on customer and brand loyalty]	[e.g Cash flow problems]

### S.W.O.T. activity sheet

[Outline how and when you plan to address each of the weaknesses/threats from your S.W.O.T. analysis above.]

<b>S.W.O.T weakness/ threat</b>	<b>Activity to address weakness/threat</b>	<b>Activity completion date</b>
[Description of a S.W.O.T weakness or threat]	[What activity is planned to address the weakness or threat?]	[Expected completion date]

<b>S.W.O.T weakness/ threat</b>	<b>Activity to address weakness/threat</b>	<b>Activity completion date</b>
[Description of a S.W.O.T weakness or threat]	[What activity is planned to address the weakness or threat?]	[Expected completion date]
[Description of a S.W.O.T weakness or threat]	[What activity is planned to address the weakness or threat?]	[Expected completion date]

## Products/services

<b>Product/Service</b>	<b>Description</b>	<b>Price</b>
[Product/service name]	[Brief product/service description]	[Unit price including GST]
[Product/service name]	[Brief product/service description]	[Unit price including GST]
[Product/service name]	[Brief product/service description]	[Unit price including GST]

**Market position:** [Where do your products/services fit in the market? Are they high-end, competitive or budget? How does this compare to your competitors?]

**Unique selling position:** [How will your products/services succeed in the market where others may have failed? What gives your products/services the edge?]

**Anticipated demand:** [What is the anticipated quantity of products/services your customers are likely to purchase? For example, how much will an individual customer buy in 6 months or 12 months?]

**Pricing strategy:** [Do you have a particular pricing strategy? Why have you chosen this strategy?]

**Value to customer:** [How do your customers view your products/services? Are they a necessity, luxury or something in between?]

**Growth potential:** [What is the anticipated percentage growth of the product in the future? What will drive this growth?]

## Sales/marketing personnel

<b>Job Title</b>	<b>Name</b>	<b>Responsibilities</b>
[e.g. Marketing/ Sales Manager]	[Mr Chris Brantley]	[What are the main responsibilities of this position?]
[e.g. Marketing/ Sales Manager]	[Mr Chris Brantley]	[What are the main responsibilities of this position?]

[Business Name] Marketing Plan [YEAR]

<b>Job Title</b>	<b>Name</b>	<b>Responsibilities</b>
[e.g. Marketing/ Sales Manager]	[Mr Chris Brantley]	[What are the main responsibilities of this position?]



## **The Future**

### Vision statement

*[What is your business' vision statement? It should briefly outline your future plan for the business and include your overall goals.]*

### Mission statement

*[What is your business' mission statement (i.e. how will you achieve your vision)?]*

### Goals/objectives

*[What are your short & long term goals? What activities will you undertake to meet these goals?]*

## **The Market**

### Unique selling position

*[How is your business unique in the market? What differentiates your product/service from others in the market? What makes your business stand out from your competition? What product gap or service need does it fill for your customers?]*

### Your customers/clients

#### **Customer demographics**

*[Define who your target customers are and how they behave. You can include age, gender, social status, education and attitudes. What are their lifestyles, activities, values, needs, interests or opinions? Where are they located?]*

#### **Key customers**

*[Identify your key customers. (These can be large consumers of your products/services or individuals whose satisfaction is key to the success of your business.) How will you target your products/services to them? How will you deliver your products/services to them?]*

#### **Customer management**

*[How will you maintain a good relationship with your customers? What techniques will you use? How will you keep your customers coming back? Have you introduced customer service standards? Do you follow any particular code of practice?]*

### Your competitors

*[How do you rate against your competitors? How can your business improve on what they offer?]*

#### **Competitor details**

*[List at least 5 competitors in the table below.]*

<b>Competitor</b>	<b>Established date</b>	<b>Size</b>	<b>Market share (%)</b>	<b>Value to customers</b>	<b>Strengths</b>	<b>Weaknesses</b>
[Competitor name]	[When were they established?]	[Number of staff and/or turnover]	[Estimated percentage of market share]	[Unique value to customers, e.g. convenience, quality, price or service?]	[What are your competitor's main strengths?]	[What are your competitor's main weaknesses?]
[Competitor name]	[When were they established?]	[Number of staff and/or turnover]	[Estimated percentage of market share]	[Unique value to customers, e.g. convenience, quality, price or service?]	[What are your competitor's main strengths?]	[What are your competitor's main weaknesses?]
[Competitor name]	[When were they established?]	[Number of staff and/or turnover]	[Estimated percentage of market share]	[Unique value to customers, e.g. convenience, quality, price or service?]	[What are your competitor's main strengths?]	[What are your competitor's main weaknesses?]
[Competitor name]	[When were they established?]	[Number of staff and/or turnover]	[Estimated percentage of market share]	[Unique value to customers, e.g. convenience, quality, price or service?]	[What are your competitor's main strengths?]	[What are your competitor's main weaknesses?]
[Competitor name]	[When were they established?]	[Number of staff and/or turnover]	[Estimated percentage of market share]	[Unique value to customers, e.g. convenience, quality, price or service?]	[What are your competitor's main strengths?]	[What are your competitor's main weaknesses?]

## Market research

[What research have you completed to help you analyse your market? Did you use a survey/questionnaire? If so, you may like to attach a copy of your survey/questionnaire and findings to the back of this plan.]

## Market targets

[Outline your planned sales targets. What quantity of your products/services do you plan to sell in a planned timeframe? Are they monthly or yearly targets?]

## Environmental/industry analysis

*[Detail the results of the market research you have performed. Is the area experiencing population growth? Are there long-term employers in the area? Is the region's economy stable? Are there seasonal variations?]*

*What is the size of the market? What recent trends have emerged in the market? What growth potential is available and where do you fit in? How will the market/customers change when you enter the market? What external factors will affect your customers?]*

## Marketing strategy

*[What is your overall marketing strategy? What steps or activities will you undertake to achieve your goals/objectives?]*

<b>Marketing activity/milestone</b>	<b>Person responsible</b>	<b>Date of expected completion</b>	<b>Cost (\$)</b>	<b>Success indicator</b>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[Who is responsible for completing this task?]</i>	<i>[When do you expect to complete the marketing activity?]</i>	<i>[Estimated cost of activity.]</i>	<i>[What indicator/ measurement result will need to be met before this activity is considered a success?]</i>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[Who is responsible for completing this task?]</i>	<i>[When do you expect to complete the marketing activity?]</i>	<i>[Estimated cost of activity.]</i>	<i>[What indicator/ measurement result will need to be met before this activity is considered a success?]</i>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[Who is responsible for completing this task?]</i>	<i>[When do you expect to complete the marketing activity?]</i>	<i>[Estimated cost of activity.]</i>	<i>[What indicator/ measurement result will need to be met before this activity is considered a success?]</i>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[Who is responsible for completing this task?]</i>	<i>[When do you expect to complete the marketing activity?]</i>	<i>[Estimated cost of activity.]</i>	<i>[What indicator/ measurement result will need to be met before this activity is considered a success?]</i>

## Advertising & sales

### Advertising and promotional strategy

<b>Planned promotion /advertising type</b>	<b>Promotional strategy</b>	<b>Expected business improvement</b>	<b>Cost (\$)</b>	<b>Target date</b>
<i>[Print media advertising, online advertising, SMS, mail-out, giveaway, media release, social media campaign or event.]</i>	<i>[Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this? Who will upkeep your social media presence?]</i>	<i>[How do you expect it will improve your business success?]</i>	<i>[Estimated cost of activity.]</i>	<i>[e.g. Dec 09]</i>
<i>[Print media advertising, online advertising, SMS, mail-out, giveaway, media release, social media campaign or event.]</i>	<i>[Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this? Who will upkeep your social media presence?]</i>	<i>[How do you expect it will improve your business success?]</i>	<i>[Estimated cost of activity.]</i>	<i>[e.g. Dec 09]</i>
<i>[Print media advertising, online advertising, SMS, mail-out, giveaway, media release, social media campaign or event.]</i>	<i>[Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this? Who will upkeep your social media presence?]</i>	<i>[How do you expect it will improve your business success?]</i>	<i>[Estimated cost of activity.]</i>	<i>[e.g. Dec 09]</i>

<b>Planned promotion /advertising type</b>	<b>Promotional strategy</b>	<b>Expected business improvement</b>	<b>Cost (\$)</b>	<b>Target date</b>
<i>[Print media advertising, online advertising, SMS, mail-out, giveaway, media release, social media campaign or event.]</i>	<i>[Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this? Who will upkeep your social media presence?]</i>	<i>[How do you expect it will improve your business success?]</i>	<i>[Estimated cost of activity.]</i>	<i>[e.g. Dec 09]</i>

### **Social media strategy**

*[What do you want to achieve/communicate (brand awareness, online sales etc)? What social media tools do your customers use (e.g. Blogs, Twitter, Facebook etc)? What strategies can you use to network and communicate effectively with these customers? Who will upkeep your social media presence – do you have the internal staff or would you need to engage an external organisation]*

### **Sales strategy**

*[What sales techniques do you use? What are your strategies behind these techniques? How is this different/better than your competitors?]*

### **Sales and distribution channels**

<b>Channel type</b>	<b>Products/services</b>	<b>Percentage of sales (%)</b>	<b>Distribution strategy</b>
<i>[e.g. Shopfront, internet, direct mail, export or wholesale.]</i>	<i>[List all the products/services sold via this channel]</i>	<i>[What percentage of overall sales do you expect to sell via this channel?]</i>	<i>[Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?]</i>
<i>[e.g. Shopfront, internet, direct mail, export or wholesale.]</i>	<i>[List all the products/services sold via this channel]</i>	<i>[What percentage of overall sales do you expect to sell via this channel?]</i>	<i>[Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?]</i>

<b>Channel type</b>	<b>Products/services</b>	<b>Percentage of sales (%)</b>	<b>Distribution strategy</b>
<i>[e.g. Shopfront, internet, direct mail, export or wholesale.]</i>	<i>[List all the products/services sold via this channel]</i>	<i>[What percentage of overall sales do you expect to sell via this channel?]</i>	<i>[Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?]</i>
<i>[e.g. Shopfront, internet, direct mail, export or wholesale.]</i>	<i>[List all the products/services sold via this channel]</i>	<i>[What percentage of overall sales do you expect to sell via this channel?]</i>	<i>[Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service?]</i>

## The Finances

*[To complete the finances portion of this marketing plan, you should rely heavily on your financial statements and projections. The business.gov.au Business plan template available at [www.business.gov.au/businessplan](http://www.business.gov.au/businessplan) can provide you with a start-up costing, balance sheet profit and loss, cash flow and a break-even analysis template.]*

### Price

*[What price have you determined for your products/services? Does this price take into account all your costs including personal, start-up, operational, cash flow and working capital? Have you also allocated a profit margin in your costing? What price will your target market bear? Do your prices take into account any seasonal variation to your suppliers' costs?]*

### Expected sales

*[What are your expected sales? When do you hope to achieve these figures? Are there seasonal influences?]*



## Marketing budget [YEAR]

[Consider the example below when developing a budget to include in your business plan.]

Item	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Marketing/promotion</b>												
Marketing agency												
Radio advertising												
Television advertising												
Print advertising												
Online advertising												
Social media												
Web search optimisation												
Mailouts												
Giveaways												
Events												
Branding & artwork												
Merchandising												
Publications												
Catalogues												
More...												
<b>Marketing/ promotion total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Other</b>												
Research												
Travel												
Postage												
Administration												
Incidentals												
More...												
<b>Other total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## Monitoring/measurement activities

[Reviewing the impact of your marketing should be a periodic activity. List the details of each review in the table below.]

<b>Marketing activity</b>	<b>Date of review</b>	<b>Monitoring methods</b>	<b>Review outcomes</b>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[e.g. Month/Year]</i>	<i>[What tools did you use to measure/monitor the impact of your marketing activities?]</i>	<i>[What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website?]</i>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[e.g. Month/Year]</i>	<i>[What tools did you use to measure/monitor the impact of your marketing activities?]</i>	<i>[What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website?]</i>
<i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i>	<i>[e.g. Month/Year]</i>	<i>[What tools did you use to measure/monitor the impact of your marketing activities?]</i>	<i>[What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website?]</i>

[Business Name] Marketing Plan [YEAR]

<b>Marketing activity</b>	<b>Date of review</b>	<b>Monitoring methods</b>	<b>Review outcomes</b>
<p><i>[Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues.]</i></p>	<p><i>[e.g. Month/Year]</i></p>	<p><i>[What tools did you use to measure/monitor the impact of your marketing activities?]</i></p>	<p><i>[What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website?]</i></p>

## Supporting documentation

Attached is my supporting documentation in relation to this business plan. The attached documents include:

- *[List all of your attachments here. These may include resumes, customer survey/questionnaire and/or financial documents.]*

## Glossary

**Australian Business Number (ABN)** – a single identifying number used when dealing with other businesses and the Tax Office.

**Australian Company Number (ACN)** – the number allocated by the Australian Securities and Investments Commission (ASIC) when you register a company under Corporations Law.

**Blog** – is a shortened word for Weblog (see Weblog).

**Channel** – a way of delivering something to its destination, whether it is a message to be communicated or a physical product to be delivered.

**Contract** – a legally enforceable agreement made between two or more parties. A contract may be a verbal contract or a written contract (or may be partly verbal and partly written).

**Demographics** – the characteristics of a segment of the population, e.g. customers.

**Domain name** – a name that identifies an organisation's address on the internet, either a website address (the domain name follows the 'www') or an email address (the domain name follows the '@' symbol in the email address).

**Goods and Services Tax (GST)** – a broad-based tax of 10 per cent on the sale of most goods and services in Australia.

**High-end** – usually refers to expensive or high quality products/services.

**Market position** – refers to the position an organisation, product or service has in the market, usually in relation to its competition.

**Milestone** – a goal or objective with a target date.

**Mission statement** – is a statement outlining how an organisation intends on achieving its vision.

**Social media** – a group of technology including Blogs, online networks (e.g. Twitter, Facebook, MySpace, LinkedIn) and online collaboration tools often used to expand your network/market reach or collaborate on a large scale.

**Unique selling position** – a characteristic of a business or a product/service that sets it apart from the competition.

**Vision statement** – an inspiring statement that expresses an organisation's main ambitions/goals.

**Weblog** – (also known as a Blog) an individual's or organisation's online website displaying a reverse-chronological list of entries (known as posts). Posts typically include thoughts, observations, promotions, links, images or videos. A Weblog is publicly available and allows readers to comment on posts.