



MARKETING PLAN

An easy to Follow Template for a
Small Business Marketing Plan

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Introduction

Congratulations! You've taken the first step towards creating a kick-ass marketing plan for your small business. There are three important rules to remember about marketing:

1. There are no hard and fast rules, because every business is different. There is no magic formula. There are only guidelines to help you get started. You need to trial and measure different types of marketing channels and tactics over time to find out what works best for you.
2. Jump into online and offline marketing with your eyes wide open. Be realistic about your expectations and what you can achieve with the resources you have.
3. The only parts of your marketing plan that should remain *inflexible* are your mission and goals. Print them out. Share them with your team if you have one. Every marketing activity you conduct should reflect your mission and take you a step closer to achieving your goals. If it deviates from that, chuck it out.

How to Use This Template

As you move through this document, the white sections will provide a template for you to complete, or instructions to follow. The corresponding blue sections contain examples. I hope they provide you with the inspiration and guidance to tailor the template to suit your business.

Finally, I suggest you create your strategy in a separate file to reflect your branding and the collaboration process you and your team use. You can copy and paste from this one as you need. Good luck!

PS. Keep it simple, otherwise you'll never roll it out.

1. Know Your Audience:

Creating a Buyer Persona

When making the decision to purchase a product or service, people are naturally drawn to businesses they know and trust. Businesses that speak their language and understand their pain. But you can't do that until you have a clear picture of who you're talking to, and why. That's why creating buyer personas is one of the more practical steps you can take to strengthen your overall sales strategy.

A buyer persona is a fictional characterization of your *ideal* customer, created from everything you know about your *existing* customers.

"What if I have more than one type of customer?" I can hear you ask.

Most businesses create multiple buyer personas. But don't get carried away. Buyer personas aren't about the customers you *could* attract. They're about the ones you really *want to* attract. That might help you narrow down the number.

Step #1: Broadly Outline Your Ideal Customers

You'll already have a broad idea of who your customers are. Describe the main groups you serve, and add more if necessary.

Customer Group #1:

Customer Group #2:

Customer Group #3:

Step #1: Broadly Outline Your Ideal Customers

Let's say, for example, you have an online and retail store called 'Dream Home', which sells homewares. You have three main groups of customers

Customer Group #1:

Women buying for themselves

Customer Group #2:

Women buying gifts for others

Customer Group #3:

Men buying gifts for their wives/girlfriends

So, we've got 3 ideal customer groups, all with similar, but slightly different motivations and needs. Great start.

Now it's time to drill down into more detail.

Before you throw yourself headlong into the research, it's a good idea to map out the information you're going to need to create your personas. But remember, it's going to be different for different businesses.

In our example of Dream Home, they're selling products to people who want their house to reflect their style and make a statement about their values. So, we probably want to know more about their family structure, aspirations and lifestyle factors.

If you deliver online training to sales-hungry realtors, you'll be more focused on their job-related goals, their career path, what terrifies them, and what success means to them.

But in both cases, you're still aiming gather information that will give you a well-rounded picture of your ideal customer, based on a range of behaviours and features.

Step #2: Define the Information You Need

What information do you need to gather about your ideal customers? Jot down your thoughts under the following headings:

Demographic

- [Information or question]
- [Information or question]
- [Information or question]

Home

- [Information or question]
- [Information or question]
- [Information or question]

Work/Career

- [Information or question]
- [Information or question]
- [Information or question]

Personal

- [Information or question]
- [Information or question]
- [Information or question]

Challenges

- [Information or question]
- [Information or question]
- [Information or question]

Buying Habits

- [Information or question]
- [Information or question]
- [Information or question]

Note: *The point of the exercise is to map out the type of information you'll need from your existing customers to create a life-like characterization of your ideal customer. So, you don't need to know every detail of their life. But you will need to do some research.*

Step #2: Define the Information You Need

Let's take the example of Dream Home

Demographic

- Where do they live?
- Gender and age
- Family structure
- Level of education

Home:

- Do they rent or own? House, apartment?
- How many people live in this home?
- How would they describe their style? Hip, boho, classic?

Work/Career:

- Industry, job title/role
- Income range
- What are their career goals?

Personal:

- What does a typical day/week look like?
- Characteristics? Sense of humour, courteous, professional, informal,
- Values? Family, loyalty, success, humility?
- What do they do in their spare time?

Challenges

- What are their big issues? What keeps them awake at night? Children, relationships, work, losing weight, money?
- What problem do they have that you can solve in relation to their home?

Buying Habits

- Do they buy online? What do they buy?
- Communication preference (email, text, phone, in person)?
- How do they find information they need on products or services?
- What hesitations do they have about buying products for their home?

There are several places to cast your research net, and you should aim for as many as your time and resources will allow without getting too overwhelmed with the process.

Step #3: Dig Deep for the Information

Existing customers and prospects. Your existing customer base is the perfect place to start your research because they've already engaged with your business. You may also have a database of prospects you've connected with on some level in the past.

In both cases, you should be analysing whatever data you've collected to start building demographic profiles – age ranges, gender, locations and so on.

Now, select a handful of customers and prospects that most resemble your ideal customer and contact them directly. Ask if they would be willing to contribute to your market research, then run through your list of questions from Step 2.

If there are any patterns or interesting trends emerging from your customer interviews, explore these in more depth via a survey of your entire customer and prospect base. Use a platform like [Survey Monkey](#), but don't bombard them with too many questions. Be respectful of their time and effort. It may help to offer a coupon or entry into a prize draw for completing the survey.

Finally, if you don't already collate feedback and comments from your existing customers, start doing this now. Their questions, comments, testimonials and even complaints are a goldmine of information, giving you verbatim snippets of material to use in your buyer personas.

Google Surveys. If you don't have a large enough customer base, try Google Surveys which is a great tool for reaching large audiences for their opinions and responses. Set up or login to your Google account and search for [surveys.google.com](#) to get started. Then select your audience based on demographic data relevant to your business, send out your survey and watch the responses roll in.

Site analytics. Your site analytics will reveal where your visitors came from, the keywords they used to find you, when they visited your site, how long they spent on each page and what action they took. This invaluable data will help you define behaviour patterns and the desires that drove them to your website in the first place.

Facebook Audience Insights. While [Facebook Page Insights](#) is a useful tool for assessing who is most engaged with the content on your page, [Facebook Audience Insights](#) takes a broader look at trends and behaviours of your ideal customers across the entire Facebook community. And with 1.47 billion daily active users, it's a wealth of knowledge.

Your own team. Depending on the size of your business, you should be talking to anyone who interacts with your customers, from the receptionist to sales and customer service staff. They will all have different stories to share and generalized perspectives on who your ideal customer is and what makes them tick.

By now you should have a good pile of data, feedback, analysis and verbatim quotes from your potential and current customers. The trick is knowing what to do with it all, and how to transform the information into effective buyer personas.

Step #3: Bring it All Together

It's likely you started to recognize some patterns and commonalities in the feedback from your customers. For example, are your customers motivated more by quality than price, or is a fast turn around a priority? Do most of your customers fall within a certain age range, or come from a distinct geographic location? Are they using similar keywords to search you out, or perhaps looking for a solution to a common problem you can help with?

Using your research findings, imagine a composite picture of your ideal customer under the following headings

Name:

Demographics & General:

Lifestyle, Values & Other Characteristics:

Goals, Challenges and Fears:

Buying Behaviors:

Notes:

- *Present your persona in the most appropriate way for you to use it effectively, ie bullet points, or longer more descriptive prose.*
- *Use verbatim quotes wherever possible to help you reflect their real language and tone in your marketing.*
- *Find a suitable image to put a face to the name. The more you can humanize your personas, the better.*
- *Once you have your primary persona completed, repeat Step #4 to create personas for your other ideal customer groups.*

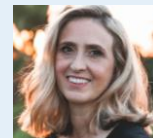
Step #3: Bring it All Together

Now we're ready to start developing the primary buyer persona for Dream Home.

Name: Jennifer

Demographics & General:

- Lives: Austin, Texas
- Age: 37
- Marital Status: Married, 2 children, (7 & 11)
- Education: University – accounting
- Works: Company Accountant for a commercial construction firm. 10 years.
- Household Income: \$150,000
- Home: 4-bedroom house – mortgaged.



Lifestyle, Values & Other Characteristics

- **A Typical Week:** She's an uber-planner/organizer. Rings her mother every Sunday. Starts work at 8.30 without fail. Loves entertaining at home. Does lunch with her girlfriends when she can, but the boys' sports and other activities always seem to get in the way.
- **Values:** To be a good mother. Hard work, loyalty, honesty (except when it's going to hurt someone's feelings) and surrounding herself with people and things that make her happy.
- **Interests:** Cooking, styling her home, sons.
- **Personal Style:** Confident, classic, timeless, bold colors.
- **Weaknesses:** She worries about money but finds it hard to resist buying things that reflect her style and will look beautiful in her home.

Goals, Challenges and Fears

- **Goals:** To keep her family safe and happy; stop feeling guilty about missing the life she had before kids; build her dream home.
- **Challenges:** Lack of time. Juggling work commitments with home life.
- **Fears:** That her kids will go off the rails; life is passing by too quickly; losing her job.

Buying Behaviors

- Likes online shopping because it saves time and there's more choice.
- Does most of her shopping at night.
- Is motivated by the latest styles and trends, as long as the quality is there.
- Price comes second but she hates feeling ripped off and loves getting a good deal.
- Impressing her friends is important but making her home more beautiful and liveable is her priority.
- Is influenced by images of beautiful styling and tries to replicate it.

2. State Your Mission

Creating a Mission Statement (or Elevator Pitch)

Your customers don't give two figs about your business. They only care about the desire or problem they have, and whether they trust you enough to solve it. They want you to be their superhero and swoon into your strong, capable arms, relieved to have found the solution to their problem.

Your marketing needs to persuade them they can stop looking, they have made the right decision. It needs to radiate confidence, ability and authority. And the epicenter of all your marketing is your mission statement. It needs to underpin everything you do and be written *from your customer's perspective*.

This is what's going to separate you from the competition.

Write Your Mission Statement

To write your mission statement, complete these three phrases:

We help [describe the customers you help] [and insert what your business does for your customers? DON'T describe what you do],
so they can [describe the transformation your customers will experience as a result of your service.]

Note: *Go back to your buyer persona and let that guide you*

Write Your Mission Statement

For Example:

If you were Dream Home, the store that sells homewares, you might say:

We help [Home and décor devotees] [create stunning living spaces, filled with love] *so they can* [bring joy to their family and wow their friends.]

Or, if you own a florist, you might say:

We help [flower lovers in Boston] [create gifts of happiness] *so they can* [express thanks, love and friendship without leaving home.]

Look at a real-life example – Walmart.

We help [people around the world] [shop affordably *anytime and anywhere*] *so they can* [save money and live better.]

Notice the common thread through these statements? They all focus on the customers' desires – bringing joy, wowing friends, expressing love, stuff I can afford, a better life.

That's what you need to aim for.

3. Decide on Your Goals

(It's like anything in life. If you don't know where you're going, how do you expect to get there?)

Spell them out, and make sure they're realistic and achievable. Don't aim for a 50% increase in new customers if you can't service them.

And include a timeline but be sensible about what you can achieve during the period covered by your marketing plan (I suggest no more than 12 months).

Marketing Goals

To establish your goals, complete this statement:

I/we will know this marketing plan has been successful when:

- -----
- -----
- -----
- -----

I/we will measure the outcomes of these goals in *[insert date]*

Marketing Goals

For Example:

We will know this marketing plan has been successful when:

- We have increased our subscriber list by 30%
- We have increased sales conversion rates by 10%
- We have increased online orders by 25%

We will measure the outcomes of these goals in July 2021

4. Marketing Channels and Tactics

Marketing is about reaching the right people, with the right message at the right time.

While your business goals should be your major driver, there are two other factors that also affect which marketing channels and tactics you should use: Your customers' buying journey (also known as the sales funnel), and the information they are looking for at each stage in that journey.



This is where it can get a little thorny, but I'll try and simplify it for you.

Let's use our Dream Home online and retail store example.

Think about what marketing messages customers need to hear to keep them moving through the 3 key phases of the sales funnel so Dream Home can achieve their goals.

Like this:

Phase One: Discovery

A lady in Toledo wakes up one morning and says, "I need to buy a rug". So, she's likely to start her search in two places: Google and the homeware stores in her local area. Dream Home is an hour away in Detroit, so their best chance of attracting her as a customer is online.

How can they do that?

- Website
- Blog, videos and other content
- Online advertising
- Social media

She finds her way to their site because they've optimized it for SEO, and sees a rug that she likes, but there's a store in Toledo that has a similar one.

She decides to visit the Toledo store, but in the meantime, she downloads Dream Home's free eBook 'Styling Tips and Tricks with Rugs'. She's glad for the information, but she's not completely convinced to buy from them yet.

During this 'Discovery Phase' of her buying journey the role of Dream Home's marketing is to:

- Drive traffic to their website, blog and/or social media by creating content that responds to key word searches in Google.
- Earn email addresses/build subscriber lists by providing helpful tips and advice in their niche.
- Generate shares and comments because they add value with their free reports, guides and videos.
- Grow awareness and interest for their business by standing out from the crowd because their content is original and relevant.

Phase Two: Relationship Building

The store in Toledo has an advantage because they can do a face-to-face sales pitch.

But Dream Home has her email address and they know - because of her actions on their site - that she's looking for a certain style of rug.

How can they use that information to increase her desire for the rug and her trust in the business?

- Set up a retargeting Google advertising campaign so she's reminded of the rug she likes every time she goes online.
- Email her a link to their blog post on the latest interior design color trends.
- Overcome any objections she might have to buying online by offering a money-back guarantee, or free shipping.

Now the role of their marketing is to:

- Tell stories, be human and evoke emotion. It's all about relationships.
- Knock 'em dead with massive value.
- Listen to any comments and feedback and respond through relevant content.
- Address objections or concerns

The customer's ready to decide between Dream Home's rug and the one in Toledo. It's time to up the ante and close the deal.

Phase Three: Taking Action

This is where Dream Home closes the deal by:

- Emailing her a special offer she can't refuse.
- Reminding her of the benefits of buying from Dream Home compared to any other store.
- Using social media to tell her about the exclusive deals she'll enjoy as a customer.

Boom.

Sale made. Happy customer.

Rinse and repeat.

So, let's summarize all that and plan what channels and tactics you might use to achieve your marketing goals.

First, you're going to get creative. It's time to work out what content and marketing messages you're going to produce to hit the sweet spot between your goals and what your customers are looking for.

At this stage, don't worry about the marketing channels. We'll cover that next. For the moment, you just want to get your thoughts down on paper. Or whatever works for you. Grab your team, your research, a whiteboard, butchers paper, or maybe you prefer mind mapping. . .and start brainstorming. Let's stick with the 'Dream Home' example. Here's what their team might come up with:

The Marketing Messages & Content Your Customers Want

Key Business Areas:	Marketing messages and information to produce:	Marketing Goals:		
Helping home and décor devotees create stunning living spaces, filled with love <i>(Hint: Go back and look at your mission statement)</i>	<ul style="list-style-type: none"> The latest color trends Get the look: coastal, rustic, industrial, boho Inside celebrity homes Seasonal: refresh your home for spring, Christmas decorating Interviews with designers Dream Home Guides to art, rugs, cosy beds, Entertaining at home New product reviews Your questions answered 	increase our subscriber list by 30%	increase sales conversion rates by 10%	Increase online orders by 25%
The Dream Home story	<ul style="list-style-type: none"> Brand awareness How/why we started Team member profiles Inside our homes Local sponsorships and charity work 			
Style School	<ul style="list-style-type: none"> Videos demos and online courses 			
Sales and special offers	<ul style="list-style-type: none"> Seasonal sales End of line sales Free shipping Free gift wrapping Existing member discounts 			
New arrivals	<ul style="list-style-type: none"> Introducing new brands New product lines 			

Now it's your turn.

Key Business Areas: What is at the heart of your business? What is your product or service? What area/s will you focus your marketing on?	Marketing messages: What are some of the announcements you can make, promotions you can run, stories you can tell, information you can share? What do your customers want to see, hear and know?	Marketing Goals: Which marketing messages will help achieve your goals?		

You're almost there! This is when you pull it all together and work out which channels you need to consider for your key business areas, based on the marketing messages and content your customers want.

The Dream Home team might take the results of their previous exercise and plot out which distribution channels are appropriate like this:

Marketing Channels

Possible Channels:	Key Business Areas				
	Helping home & décor devotees create stunning living spaces, filled with love	The Dream Home Story	Style School	Sales and special offers	New arrivals
Online/Digital					
Website	✓	✓	✓	✓	✓
Blog posts	✓	✓			
Email Marketing	✓		✓	✓	✓
Social media	✓	✓	✓	✓	✓
Coupon campaigns	✓			✓	
Google Adwords	✓			✓	✓
Facebook Ads	✓	✓	✓	✓	✓
Videos	✓	✓	✓		
Newsletters	✓	✓	✓	✓	✓
Offline/Local					
Networking		✓			
Local PR			✓	✓	✓
Cross Promos				✓	
Branded Vehicles		✓			
In-store events	✓	✓		✓	✓
Local sponsorship		✓			
Branded Merchandise		✓			
Flyer distribution				✓	✓
Shopfront displays	✓			✓	✓

Over to you:

Possible Channels:	Key Business Areas				
Online/Digital					
Offline/Local					

5. Set Your Small Business Marketing Budget

One of the biggest mistakes a lot of small business operators make is to view the dollars they spend on marketing as an unnecessary expense instead of an investment. But if you don't consistently reach out to your potential customers and keep your business top of mind, you may not have a business at all. So, you need to invest in your marketing and measure your return on investment to know what's working and what isn't.

Marketing Budget

Your small business marketing budget needs to take your resources, skills and time into consideration. Ask yourself these questions:

- Who is going to produce and manage your marketing?
- What skills will you need to outsource?
- Is there someone on your team who has the passion and ability to drive your social media?
- What are you already paying for? Website hosting, email automation, design software?
- What other tools or services do you think you'll need?
- How much are you willing to invest in your marketing?

Note: *A good rule of thumb for a marketing budget is around 5-10% of your gross revenue, depending on whether you're maintaining existing sales or looking to grow.*

Here's some further information that might help: [How Much Should You Spend Marketing a Small Business](#)

Marketing Budget

For Example:

- **Who is going to produce and manage your marketing?**

As the proprietor of Dream Home, I will produce and manage all marketing activities for the foreseeable future.

- **What skills will you need to outsource?**

Technical website tasks, online advertising (strategy, set up, monitoring etc).

- **Is there someone on your team who has the passion and ability to drive your social media?**

My assistant is a whizz at Facebook and has expressed an interest.

- **What are you already paying for? Website hosting, email automation, design software?**

Website hosting, Canva (graphic design), Campaign Monitor (email campaigns), Uber Suggest (SEO research), Shutterstock (images)

- **What other tools or services do you think you'll need?**

Possibly social media and blogging scheduling and management tools. Google Analytics training.

- **How much are you willing to invest in your marketing?**

8% of gross revenue, (75% online, 25% local)

The Final Step

Now, go back to your list of marketing channels and split your budget up between all the activities. You won't know exactly what everything's going to cost at this point, but you want a rough allocation of funds against each channel. And don't forget to allocate funds to any outsourcing or other costs you identified in the questions above.

My guess is, you'll run out of funds before you finish the exercise. Most people do, because they rush into their marketing wanting to do everything.

Don't increase your budget unless you are 100% confident you can afford to. Instead, re-assess all the channels and activities you have listed and decide where you will get most bang for your buck. Then trial, measure, tweak, and repeat what works.

And remember, the only parts of your marketing plan that should remain *inflexible* are your mission and goals. Every marketing activity you conduct should reflect your mission and take you a step closer to achieving your goals. If it deviates from that, refine it or chuck it out.