**[Company name]**

**Marketing Plan**

Date:

Marketing Plan

* 1. Marketing

Target market – Recruitment of New Clients

Who is your target market? How does your target market compare to your current   
customer base? Have you researched either of them?

|  |  |  |
| --- | --- | --- |
| **Profile** | **Ideal target market** | **Current customers** |
| **What’s their gender** |  |  |
| **What’s their age?** |  |  |
| **Where do they live?** |  |  |
| **What sort of work do they do?** |  |  |
| **How do they spend their spare time?** |  |  |
| **What are their values?** |  |  |
| **What are their needs?** |  |  |
| **Why would they choose your product/service?** |  |  |

Competitors

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **[Business Name]** | **[Competitor Name]** | **[Competitor Name]** | **[Competitor Name]** |
| **Products** |  |  |  |  |
| **Price** |  |  |  |  |
| **Market share** |  |  |  |  |
| **In business since** |  |  |  |  |
| **Business structure** |  |  |  |  |
| **Target customers** |  |  |  |  |
| **Positioning in the market** |  |  |  |  |
| **Point of differentiation** |  |  |  |  |
| **Strengths** |  |  |  |  |
| **Weaknesses** |  |  |  |  |

Marketing and promotion

How do you promote your business? How do you get your customer to buy from you?   
Complete the following tables for recent and planned activity (change/delete as required).

Recent activities

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication method** | **Target audience** | **Objectives** | **Key message** | **When** | **Where** | **Cost** | **Return** |
| **Advertising** |  |  |  |  |  |  |  |
| **Letters/flyers/ brochures** |  |  |  |  |  |  |  |
| **Calling / visitation programs** |  |  |  |  |  |  |  |
| **Sponsorships / Events** |  |  |  |  |  |  |  |
| **Trade shows** |  |  |  |  |  |  |  |
| **Media coverage (PR)** |  |  |  |  |  |  |  |
| **Loyalty programs** |  |  |  |  |  |  |  |
| **Website** |  |  |  |  |  |  |  |
| **Internet** |  |  |  |  |  |  |  |
| **[Other]** |  |  |  |  |  |  |  |

Planned activities to attract new clients

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication method** | **Target audience** | **Objectives** | **Key message** | **When** | **Where** | **Cost** | **Expected Return** |
| **Advertising** |  |  |  |  |  |  |  |
| **Letters/flyers/ brochures** |  |  |  |  |  |  |  |
| **Calling/ visitation programs** |  |  |  |  |  |  |  |
| **Sponsorships/ Events** |  |  |  |  |  |  |  |
| **Trade shows** |  |  |  |  |  |  |  |
| **Media coverage (PR)** |  |  |  |  |  |  |  |
| **Loyalty programs** |  |  |  |  |  |  |  |
| **Website** |  |  |  |  |  |  |  |
| **Internet** |  |  |  |  |  |  |  |
| **[Other]** |  |  |  |  |  |  |  |

* 1. Customer Strategy

Customer management

Is your customer service model cost effective? How do you retain your most profitable customers? How do you manage or move on customers you would prefer not to keep?

Customer acquisition

How do you acquire new customers? How many do you expect to acquire each year over   
the next three years? Be specific and realistic.

* 1. Client Retention Strategies   
     Planned activities to protect your trail and keep marketing to your clients

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Communication method** | **Target audience** | **Objectives** | **Key message** | **When** | **Where** | **Cost** | **Expected Return** |
| **RBA Bulletins (Powerport)** |  |  |  |  |  |  |  |
| **Flyers** |  |  |  |  |  |  |  |
| **Calling/ visitation programs** |  |  |  |  |  |  |  |
| **Newsletters (Powerport)** |  |  |  |  |  |  |  |
| **Annual gifts or events** |  |  |  |  |  |  |  |
| **Christmas Cards** |  |  |  |  |  |  |  |
| **Birthday Cards** |  |  |  |  |  |  |  |
| **Annual property or suburb reviews** |  |  |  |  |  |  |  |
| **Loan health checks** |  |  |  |  |  |  |  |
| **[Other]** |  |  |  |  |  |  |  |