



Keys to Success: How to Create a Successful Marketing Plan

Are you ready to create a marketing plan, but aren't sure where to start? Give yourself at least 30 minutes and use the following worksheet to create a plan that is right for your business.

1. Define your target customer.

Do you sell to businesses or individuals?

Businesses _____ Individuals _____

If your customer base is other businesses, here are some questions to consider:

What kinds of businesses do you currently sell to? _____

Are there other types of businesses that your company could sell its products/services to? _____

What size company does your business sell to? _____

Where are the majority of your customers located? _____

What is the primary service/product that these customers want from your business? _____

If your customer base is comprised of individuals, here are some questions to consider:

What is the typical age range of your customers? _____

What is the typical income level of your customers? _____

Is your product/service targeted to a specific gender? _____

What is the primary reason that individuals use your business? _____

2. Target your customers.

What professional organizations are your customers likely to join? _____

What can you bring to these organizations? (leadership skills, event planning, contributing to a newsletter or speaking on a certain topic, etc.) _____

What publications are your customers likely to read? Consider trade publications, the local newspaper, association newsletters, etc. _____

3. Create relationships with other businesses.

List all the industries that are related to your company's product/services: _____

Search online and look in the phone directory for local businesses in related industries. List them here:

Create a plan for introducing yourself to these business owners: _____

4. Cultivate your clients.

How you will collect your clients' e-mail and mailing addresses? _____

How you will organize and manage their information once it is obtained? _____

Which method of contact suits your budget, skills and resources (an e-newsletter, holiday cards, thank you cards, a yearly phone call, etc.)? _____

5. Foster goodwill.

List volunteer opportunities that would suit your interests: _____

Which of the volunteer opportunities that you listed are more likely to attract your target customers?
