



*“Coaching to Excellence”*

## **Marketing Plan Template**

### **Overview of practice**

- Business strategy
- Mission, vision and core values that are a foundation for the marketing plan
- Relevant history of practice or previous marketing efforts

### **Situational Analysis**

- SWOT analysis: Strengths, Weaknesses, Opportunities, Threats
- An overview of relevant environmental conditions: economic, social, political, legal, competitors' strengths and weaknesses

**Marketing Planning:** Marketing objectives, target markets and the marketing mix

#### *Marketing Objectives:*

- State desired outcome
- Should be measurable- a numerical achievement such as a % increase in revenues or specific number of increased referrals
- Should be a challenge but attainable
- Must include detailed tactics for how the objective will be achieved and who will fulfill various job tasks/roles
- Timetable for achievements should be established

#### *Target Markets:*

- Group of clients practice wishes to attract
- Can be segmented based on specific criteria

#### *Marketing mix: 4Ps*

Product: services or products practices wishes to promote

Promotion: how the practice will use written or verbal communication to inform clients about services

Price: strategy and basis for establishing fees

Place: location of services

### **Implementation and Control of the marketing plan**

- Assignments for who will be responsible for executing plan tactics
- Who will responsible for monitoring progress of plan
- Measuring success of plan initiatives

### **Budget and financial analysis**

- Estimates of relevant marketing costs
- Forecasts for projected return on investment