**PREVIEW - STRATEGIC PLAN WORKSHEET**

Company Name: Click or tap here to enter text.

# 1. Company and Product(s) Description

|  |  |
| --- | --- |
| Your company description should be a concise and informative overview of your business that provides an understanding of your company's purpose, offerings, values, and market positioning. Some areas it should include are: | Click or tap here to enter text. |
| Company name and branding | Click or tap here to enter text. |
| Mission statement | Click or tap here to enter text. |
| Vision statement | Click or tap here to enter text. |
| Products and services offered | Click or tap here to enter text. |
| Market position (leader, niche player, start-up, etc.) | Click or tap here to enter text. |
| Primary customer segments | Click or tap here to enter text. |
| Core values and culture | Click or tap here to enter text. |
| Geographic reach | Click or tap here to enter text. |
| History | Click or tap here to enter text. |
| Future company goals (expansion, acquisition, etc. | Click or tap here to enter text. |

# 2. Purpose, Overall Goals and Key Performance Indicators (KPI)

|  |  |
| --- | --- |
| **Purpose of the Marketing Plan Example:** *Support our wholesale and retail sales efforts through effective marketing programs which build customer retention, acquire new customers, and generate more revenue*.  *Metrics: Sales during the launch period* | Click or tap here to enter text. |
| **Overall Goal of the Marketing Plan**  **Example:** *Expand our market share by increasing sales to current customers and creating conquest sales opportunities.* | Click or tap here to enter text. |
| **Key Performance Indicators**  In the context of the overall marketing convergence plan, KPIs define and measure the success of each of the marketing objectives. They should be recapped here.  See the Guidebook for examples. | Click or tap here to enter text. |

# 3. Products We Sell

|  |  |
| --- | --- |
| Describe the products sold that this plan addresses. Can include images of the products) | Click or tap here to enter text. |
| Product Name |  |
| Product Name |  |

# 4. Markets We Sell To

# 5. Strengths and Weaknesses

# 6. Opportunities and Threats

# 7. Sales Goals by Market(s)

# 8. Sales Goals by Product(s)

# 9. Marketing Objectives, Strategies and Tactics

# 10. Marketing Budget Summary and ROI