

# MARKETING PLANNING PRO WITH AI FOR BUSINESSES

Increase Sales and Build Lasting  
Relationships with Customers With Easy-  
to-Use Online Marketing Planning Tools

---

**MARKETING CONVERGENCE SOLUTIONS**

# MARKETING PLANNING PRO FOR BUSINESS

[WWW.MARKETINGPLANNINGPRO.COM](http://WWW.MARKETINGPLANNINGPRO.COM)

## Instructions on How to Build Your Strategic Marketing Plan Using AI Powered Online Forms

by RE Casper, Marketing Convergence Solutions

[www.convergencestrategies.com](http://www.convergencestrategies.com)

[info@convergencestrategies.com](mailto:info@convergencestrategies.com)

Vero Beach, Florida 32967

© 2024, Marketing Convergence Solutions, all rights reserved. No portion of this marketing plan template may be reproduced in any form without written permission from the author, except as permitted by U.S. copyright law. This publication is designed to provide accurate and authoritative information regarding the subject matter covered. Every effort has been made to ensure the accuracy of the information within this marketing plan template was correct at the time of publication. The writer does not assume and hereby disclaims any liability to any party for any loss, damage, or disruption caused by errors or omissions, whether such errors or omissions result from accident, negligence, or any other cause.

# Table of Contents

## Page

### **4 INTRODUCTION**

### **9 INSTRUCTIONS AND QUESTIONS FOR ONLINE FORMS**

Section I | Our Company, Branding, Customers, and Products

Section II | Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics

Section III | Develop a Marketing Budget Summary and ROMI

Section IV | Executive Summary

Section V | Appendix

### **39 ADDENDUM**

# INTRODUCTION

## Use These Instructions for Answering Questions in Online Forms to Create Your Measurable Marketing Plan

### Can You Explain How Your Marketing Performs?

Throughout my career leading marketing teams, both in-house for corporations and on the agency side, I was frequently asked to quantify the value of our marketing efforts. Senior leadership often wanted to know, *“What kind of return can we expect from this campaign?”* or *“How will this plan impact revenue?”*

In other words, they wanted marketing performance explained in terms of **actual business results**.

That's why it became imperative for me and my teams to align specific goals and Key Performance Indicators (KPIs) before launching any new marketing initiative. We didn't just “do marketing,” we set clear expectations for what success will be.

Just as important was our commitment to tracking performance during and after execution. These insights could guide our future decisions, what to keep doing, what to stop, and where to optimize.

This is exactly why in-depth marketing planning is essential. Without thorough business analysis, goal setting, and clearly defined KPIs, marketing becomes little more than guesswork. Objectives, strategies, and tactics without measurement are just a shot in the dark.

*And that's why I've designed this guide, with its instructions, examples, and planning templates: to help you simplify the process of building a strategic marketing plan that walks you through each step, from setting goals to launching campaigns.*

## Step 1 | Getting Started

Start your planning by reviewing this Marketing Planning Pro planning guide and the [online forms and instructions](#) in detail.

The guide is organized in logical sections that help you define your purpose, analyze your strengths, define your customer base, set measurable objectives, and outline actionable tactics. Fill in each part as you go, using the examples provided as inspiration. Don't worry about being perfect, what matters is clarity and commitment to follow-through.

Think of this as both a **workbook and a playbook**. As you complete each section, you're not just writing a plan, you're building a focused, data-driven strategy that helps you make smarter marketing decisions, connect better with customers, and ultimately grow your business.

Use it, revisit it often, and adjust your tactics based on what works. This is your roadmap to more consistent, effective, and profitable marketing.

Additional resources about marketing planning can be found at our website, [www.marketingconvergencesolutions.com](http://www.marketingconvergencesolutions.com).

For more help, our 98-page marketing planning guidebook offers insights and various examples of business marketing challenges and scenarios to develop marketing objectives, strategies, and tactics that deliver improved sales results that meet or exceed key revenue generation goals.

Order the book from [Amazon](#) or [Barnes and Noble](#).

## Step 2 | **Select the Planning Team**

Begin your strategic marketing plan by assembling a cross-functional planning team. Use this team to brainstorm, complete each section collaboratively, and bring real-world insights into the planning process. Choose individuals who bring valuable insights, experience, and collaboration skills:

- **Sales Representatives:** Select seasoned professionals who engage directly with customers. These “feet on the street” team members offer real-world perspectives that ground the planning in customer realities.
- **Marketing Professionals:** Include creative and experienced marketers who are open to innovation and solution-focused thinking.
- **Bring in other professionals** from Product Management, Operations, and Finance to complete your team as needed.

## Step 3 | **Planning Meeting Preparation**

Once your team is in place:

- **Distribute Materials:** Share this marketing plan outline, definitions, and examples with all team members in advance. Allow time for review and preparation.
- **Schedule the Planning Session:** Choose a date and ensure the team is available for a focused, uninterrupted session.

## Step 4 | **Facilitate an Effective Planning Session**

Create a productive, engaging atmosphere:

- Use flip charts and whiteboards to capture input and visualize ideas.
- Ask questions and prompt discussion for each section of the plan.
- Ensure the environment is comfortable: provide good seating, regular breaks, coffee, drinks, and snacks to maintain focus and energy.
- Make sure that someone is appointed to take detailed notes of the discussions.

## Step 5 | Write the Marketing Plan

Using input from your planning team, insights from the planning meeting, and your own expertise, complete the strategic marketing plan by filling in the questions found in the [Marketing Planning Pro Online Forms](#).

You may find it helpful to assign specific sections or questions to different team members based on their roles or areas of expertise.

Use the AI Assistant with help in formulating and editing your answers.

Here are the sections of the marketing plan that are covered in this guide.

**Section I | Our Company, Branding, Customers, and Products**

**Section II | Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics**

**Section III | Develop a Marketing Budget Summary and ROMI**

**Section IV | Executive Summary**

**Section V | Appendix**

## Lean on AI for Help in Developing Marketing Tactics

The built-in **Marketing Planning Pro AI Assist** and others such as [ChatGPT](#), [CoPilot](#), [Gemini](#), and [Claude](#), can be used to develop marketing tactics by translating tactics for marketing objectives and strategies into

specific, actionable plans, such as campaigns, messaging, content calendars, targeting, and platform recommendations.

AI tools can analyze market trends, customer behavior, competitor activity, and performance data to recommend and even generate creative assets tailored to your strategic goals.

How AI Helps Map Strategy to Tactics

Step	AI Contribution
Define objectives	Helps refine goals using SMART criteria and industry benchmarks
Align with strategy	Ensures tactics align with positioning, audience targeting, and core messaging
Suggest tactics	Generates campaign ideas, channel plans, content formats, and timing suggestions
Automate content creation	Creates social posts, ad copy, images, and hashtags based on tone and audience
Personalize messaging	Segments audiences and tailors content for each persona
Optimize performance	Analyzes engagement metrics and suggests adjustments for better results



# INSTRUCTIONS AND QUESTIONS FOR ONLINE FORMS

## Section I | **Our Company, Branding, Customers, and Products**

### **Question 1 | Company Description and Branding**

Provide a concise overview of the company, including its legal name, ownership structure, founding date, and primary business activities.

Then, describe your branding strategy:

- What does your brand stand for?
- What is your value proposition?
- What visual elements (logo, colors, style) represent the brand?
- What tone of voice do you use in communication?

### **Question 2 | Company History**

Summarize the company's background and key milestones. Include:

- Founding story and original purpose
- Major achievements, changes, or pivots
- Growth in team, products, or customers over time

### **Question 3 | Core Values and Culture**

List 3 to 6 guiding principles or beliefs that shape your company's behavior. Describe how these values:

- Influence your team's actions and decisions.
- Support the brand promise.
- Create a consistent customer experience.
- Mention how these values show up in hiring, leadership, and service.

## Question 4 | **Mission Statement**

State your company's core purpose in a short, powerful statement. Focus on:

- What your business does
- Who it serves
- Why it exists

Keep it clear, inspiring, and aligned with your values.

### **Nike Mission Example**

*"To bring inspiration and innovation to every athlete\* in the world. (\*If you have a body, you are an athlete.)"*

## Question 5 | **Vision Statement**

Describe what the company aspires to become in the future.

Your vision should:

- Be long-term and forward-looking.
- Reflect your ambitions.
- Guide strategic decisions and inspire internal teams.

### **Nike Vision Example**

*"To do everything possible to expand human potential."*

## Question 6 | **Products and Services**

List and briefly describe your main products or services.

For each one:

- State what it is
- Who it serves
- What problem it solves
- How it is delivered or sold
- Include any key differentiators (e.g., proprietary technology, superior service).

### **Question 7 | Market Position**

Explain how your company is positioned in the market. Include:

- The niche you fill or the problem you solve
- Your competitive advantage
- Your pricing strategy (premium, value-based, etc.)
- How customers perceive your brand relative to competitors

### **Question 8 | Primary Target Customer Segments**

Define your primary customer groups. Include:

- Demographics (age, gender, income, etc.)
- Psychographics (lifestyle, values, buying motivations)
- Behaviors (how and where they shop, key decision drivers)
- Pain points your product/service addresses

### **Question 9 | Secondary Target Customer Segments**

Define your secondary customer groups. Include:

- Demographics (age, gender, income, etc.)
- Psychographics (lifestyle, values, buying motivations)
- Behaviors (how and where they shop, key decision drivers)
- Pain points your product/service addresses

### **Question 10 | Geographic Reach**

Specify the regions, markets, or countries where you operate or plan to operate. Include:

- Current geographic markets served
- Distribution methods (local, regional, online, global)
- Plans for future expansion or localization

### **Question 11 | Future Company Goals**

List 3 to 5 measurable goals for the next 1–5 years. Goals should be:

- Aligned with the mission and vision
- Specific and time-bound (e.g., increase market share by 10% in 2 years)
- Related to growth, product development, partnerships, or impact

## Question 12 | **Competition**

Identify your key competitors and describe:

- Their strengths and weaknesses
- How they are positioned in the market
- What makes your company different or better
- How you will respond to or outmaneuver them

## Question 13 | **Overall Goal of the Marketing Plan**

Define the main goal the marketing plan aims to achieve. This should be a clear, high-level goal that aligns with company priorities.

### **Examples**

- Increase brand awareness among a new customer segment.
- Drive a specific percentage of revenue growth from a product line.
- Generate a target number of qualified leads in a new market.
- Support market entry or product launch success.

When writing this goal:

- Keep it SMART (Specific, Measurable, Achievable, Relevant, Time-based).
- Ensure it supports the company's business strategy.
- Limit this to one primary goal (with supporting objectives later in the plan).

### **Overall Goal Example**

*"Expand our market share by increasing sales to current customers and creating conquest sales opportunities."*

## Question 14 | Summary of Your Products

When writing a summary of the products, consider both the functional details and the strategic positioning of each product. The summary should not only describe *what* the company sells but also highlight *why it matters* to the customer and *how it differentiates* from the competition.

### Here's what to include and consider

#### Product Categories or Groupings

- Organize products into logical categories (e.g., core product lines, services, digital offerings, seasonal items).
- Group similar items to avoid overwhelming the reader.

#### Features and Benefits

- Clearly describe key features (ingredients, specifications, formats).
- More importantly, emphasize the customer benefits such as what problems the product solves or value it delivers.

#### Target Audience for Each Product

- Note which customer segments each product is designed for.
- Include how the product aligns with that audience's needs or lifestyle.

#### Differentiators

- Explain what makes each product unique or superior such as proprietary formulations, third-party certifications, premium sourcing, technology, etc.
- Consider how it compares to competitors.

#### Formats and Pricing Strategy

- Note general price positioning (e.g., value, mid-tier, premium), especially if it reflects your brand strategy.

### Sales Channels

- Indicate where the product is available (e.g., e-commerce, dealerships, retail stores, Amazon, direct sales).
- Highlight if a product is exclusive to a certain channel.

### Stage in Lifecycle

- Identify whether the product is new, a best-seller, seasonal, or nearing phase-out.
- This context helps prioritize marketing focus.

### Branding and Product Naming

- Mention any sub-brands or signature product names.
- Note how the names support the brand story or customer appeal.

### Visual and Descriptive Consistency

- Use brand-consistent language and tone that aligns with your messaging elsewhere.
- Keep it professional, benefit-driven, and free of jargon your customer wouldn't understand.

**Tip:** If appropriate, include customer testimonials, performance metrics, or usage stats to support credibility.

## SWOT Analysis Instructions

A SWOT analysis is a very important guide in marketing planning because it can give you a clear snapshot of your business's Strengths, Weaknesses, Opportunities, and Threats.

- **Strengths and weaknesses** highlight what the company does well and where it falls short, helping marketers focus resources effectively.
- **Opportunities and threats** point to external factors such as market trends, competition, or regulations that can influence success.

By organizing these insights, businesses can make smarter decisions, align objectives, strategies, and tactics with market realities, and reduce risks while maximizing advantages.

### **Instructions for Strengths**

**Ask:** What does the company do well, and what gives it an advantage in the marketplace in each of these areas?

#### **Consider**

- Highly successful marketing initiatives
- Brand reputation and customer loyalty
- Unique products or proprietary technology
- High-quality customer service or experience
- Strong distribution networks or strategic partnerships
- Financial stability or access to capital
- Talented team or leadership
- Differentiated marketing strategy or positioning
- Certifications or awards

**Tip:** Focus on what sets the business apart from competitors and supports growth.

### **Instructions for Weaknesses**

**Ask:** Where is the company vulnerable or underperforming compared to others in each of these areas?

#### **Consider**

- Gaps in product offerings or outdated inventory
- Weak online presence or limited digital capabilities
- Brand awareness challenges
- Customer complaints or high churn

- Limited market reach or geographic footprint
- Small marketing budget or team bandwidth
- Poor internal communication or misaligned departments

**Tip:** Be honest. Identifying weaknesses is critical for planning improvements.

## **Instructions for Opportunities**

**Ask:** What trends, gaps, or changes in the market can the company leverage in each of these areas?

### **Consider**

- Emerging customer needs or underserved segments
- Shifts in cultural, demographic, or lifestyle trends (e.g., wellness, sustainability)
- New technologies or platforms to reach customers
- Market expansion (new regions or channels)
- Strategic partnerships or influencer collaborations
- Competitors exiting or weakening in the market
- Regulatory changes that benefit your business

**Tip:** Look at both macro trends and category-specific opportunities.

## **Instructions for Threats**

**Ask:** What external forces could negatively impact the business in each of these areas?

### **Consider**

- New or aggressive competitors
- Changes in customer behavior or loyalty
- Supply chain issues or rising production costs
- Regulatory changes or legal risks



- Economic downturns or inflation
- Negative press or social backlash
- Dependency on a single channel, supplier, or demographic

**Tip:** Monitor your environment regularly to identify early warning signs.

Answer Questions 15, 16, 17, and 18 to Complete a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) for Promotion, Product, Price, and Place (Distribution).

### Question 15 | **PROMOTION Strengths, Weaknesses, Opportunities, and Threats (SWOT)**

### Question 16 | **PRODUCT Strengths, Weaknesses, Opportunities, and Threats (SWOT)**

### Question 17 | **PRICE Strengths, Weaknesses, Opportunities, and Threats (SWOT)**

### Question 18 | **PLACE (DISTRIBUTION) Strengths, Weaknesses, Opportunities, and Threats (SWOT)**

### Question 19 | **Sales Goals by Market and by Products for Current Year, Year 1, Year 2, and Year 3**

Set measurable sales goals based on:

- Past sales performance
- Market trends
- Competitive environment

Coordinate with Finance, Operations, Product Management, and other key departments to validate projections for the next one, two, and three years.

When setting sales goals, marketing planners must balance ambition with realism and ensure that goals are aligned with broader business strategies. Below are the key considerations to guide the goal-setting process:

### **Align with Business Objectives**

- Ensure sales goals support overall company objectives (e.g., revenue growth, market expansion, product launch success).
- Coordinate with finance, sales leadership, and executive teams for consistency.

### **Use Historical Sales Data**

- Analyze past performance by product, region, channel, and segment.
- Identify seasonality, trends, and patterns to create realistic baselines.

### **Make Goals SMART**

- Specific – Clearly define what you want to achieve.
- Measurable – Use concrete metrics (e.g., \$ revenue, # of units, % growth).
- Achievable – Stretch, but within reach given your resources.
- Relevant – Tied directly to marketing and business priorities.
- Time-based – Set deadlines (e.g., monthly, quarterly, annually).

### **Account for Market Conditions**

- Consider economic trends, consumer confidence, industry health, and competition.
- Adjust expectations based on market expansion, pricing changes, or supply chain constraints.

### **Factor in Marketing Activities**

- Link goals to specific campaigns, launches, and promotions.
- Estimate impact of new marketing investments (e.g., paid ads, email automation, influencer partnerships).

### **Segment Goals**

- Break down overall sales goals by:

- Product or service line
- Markets or customer segments
- Sales channel (e-commerce, retail, DTC, wholesale)
- Geographic region
- Sales rep or team (if applicable)

### **Collaborate with Sales Team**

- Work closely with sales managers and reps to understand field realities.
- Ensure mutual buy-in to avoid goals that are too aggressive or too conservative.

### **Consider Conversion Metrics**

- Use your [marketing funnel](#) to estimate how much traffic, leads, or trials are needed to hit sales goals.
- Reverse-engineer sales from lead generation and customer acquisition rates.

### **Budget and Resource Constraints**

- Ensure goals are realistic based on available budget, team size, ad spend, and operational capacity.
- If scaling is expected, make sure operations and fulfillment can keep up.

### **Plan for Monitoring and Adjustment**

- Set checkpoints (e.g., monthly reviews) to monitor progress.
- Be ready to refine strategies or reallocate resources if you're off-track.

**Tip:** Tie sales goals to incentives or KPIs if you're managing internal teams or partners. Motivation and accountability improve goal achievement.

## Section II | Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics

Develop your marketing Plan Deliverables which are the objectives, strategies, and tactics for:

- **Promotion**
- **Product**
- **Price**
- **Place (Distribution)**

Tactics will include specific, actionable plans, such as campaigns, messaging, content calendars, targeting, and platform recommendations.

AI will analyze market trends, customer behavior, competitor activity, and performance data to recommend and even generate creative assets tailored to your strategic goals.

Here are definitions for each deliverable:

### **Objectives**

Objectives should align with the overall marketing plan goals and serve as benchmarks for performance.

Ensure objectives are **SMART**:

- Specific
- Measurable
- Achievable
- Relevant
- Time-Based

## **Strategies**

Strategies should align with the strengths, weaknesses, opportunities and threats your planning team believes are important to address.

- Strategies: Outline how you will achieve each objective.
- Tactics: Provide specific actions, each with:
  - Implementation details
  - Assigned responsibilities
  - Timing and budget allocation

## **Primary and Secondary Target Audiences Must be Defined**

Define the demographics of each segment to include age, income, urban, rural, gender, and other characteristics that could define each segment.

## **Tactics**

Marketing tactics must deliver the results for the marketing objectives and strategies.

## **Examples of Tactics Include:**

### **Promotions**

Promotions and incentives must motivate your target audience to buy or participate. These incentives should provide genuine value and can include discounts, sweepstakes, salesperson incentives, free offers, exclusive access, limited time offers, or rewards.

### **Messages**

Messages must be clear and concise and communicates benefits and value. Persuasive language must highlight unique selling points, a call-to-action, and create a sense of urgency or exclusivity to encourage action.

## **Communications Channels**

Leverage various communications channels such as email marketing, social media, website banners, SEO pay-per-click, print media, direct mail, influencers, and partnerships.

## **All tactics must include the following:**

### **Performance Measurement**

Each tactic should have performance measurement (KPI) to track its level of success (or failure). Measurements can include the sales boost in units and \$, increased customer traffic, entries received, and new customer leads.

### **Budget, Responsibilities, Timing**

Budgets must be allocated for executing each tactic. Budgets must align with the expected return on marketing investment (ROMI). Assign specific timing and the teams responsible for implementing each task within the tactic.

### **Key Performance Indicators (KPI) for This Objective**

Tactics must support each marketing objective's KPI (Key Performance Indicator) to measure how well the objective is being met. KPIs provide valuable insights into how well the marketing strategies and tactics are progressing toward achieving the objectives. In marketing convergence, KPIs can include:

- Units or \$ sold
- Leads generated
- Return on marketing investment (ROMI)
- Customer acquisition cost (CAC)

### **Timing**

In what time frame will the objective be accomplished?

### **Example**

Develop in Q1. Implement in Q2.

### **What Incentive Offer(s) Will Motivate the Target Audience**

These can include discounts, rebates, free goods, points toward rewards, cash, or travel. All must align with target audiences' interests and provide genuine value.

### **Examples of Measurable Tactics**

- Escalating sales incentives to salespeople for leads generated
- Escalating incentives for turning leads into sales
- Tie-in rewards program for top-performing salespeople
- Rebate offers for new customers

### **Create the Message. Preferably the “One Thing” That will Convey the Offer to Motivate the Customer or Prospect to Buy**

The message must be clear and concise and communicate the benefits and value of the promotion. Highlight unique selling points and create a sense of urgency or exclusivity to encourage action. Tailor the messaging to different promotional channels and target segments if applicable.

### **Message Example**

Earn up to \$3,000 in rewards for generating new conquest leads and closing new conquest sales.  
\$250 new customer rebate with purchase. Program runs (timing)

**See the ADDENDUM for Additional Examples  
of Objectives, Strategies, and Tactics**

# Create Your Objectives, Strategies, and Tactics To Address PROMOTION

## **Promotion** (*How you communicate and persuade*)

Involves all the tactics used to raise awareness and generate demand.

### **Examples**

- Advertising (Broadcast, digital, print)
- Sales promotions (coupons, BOGO, limited-time offers)
- Public relations and media outreach
- Social media marketing
- Content marketing (blogs, video, email)
- Influencer and affiliate marketing
- Direct marketing (email, SMS, catalogs)
- Event marketing (trade shows, pop-ups, webinars)
- Sponsorships and partnerships
- Loyalty programs and CRM campaigns
- Training

**Question 20 | Promotion Objective**

**Question 21 | Promotion Strategy and Target Audience**

**Question 22 | Promotion KPIs**

**Question 23 | Promotion Measurement Plan**

**Question 24 | Promotion Tactics with Responsibilities, Timing and Budgets**

**Question 25 | Total Budget, All Promotion Tactics**



**Question 26 | ROMI All Promotion Tactics: [Return On Marketing Investment (ROMI) for Promotion) = Gain – Budget / Budget X 100]**

# Create Your Objectives, Strategies, and Tactics To Address PRODUCT

## **Product** (*What you offer to the market*)

Focuses on the value delivered through what you sell.

### **Examples**

- Product features and benefits
- Product quality and design
- Branding
- Packaging
- Product assortment/portfolio
- Lifecycle stage (intro, growth, maturity, decline)
- Product differentiation
- Warranties and guarantees
- Customer support and service
- Innovation and RandD

**Question 27 | Product Objective**

**Question 28 | Product Strategy and Target Audience**

**Question 29 | Product KPIs**

**Question 30 | Product Measurement Plan**

**Question 31 | Product Tactics with Responsibilities, Timing and Budgets**

**Question 32 | Total Budget, All Product Tactics**

**Question 33 | ROMI for All Product Tactics: [Return On Marketing Investment (ROMI) for Products) = Gain – Budget / Budget X 100]**

# Create Your Objectives, Strategies, and Tactics To Address PRICE

## **Price** (*What the customer pays*)

Determines perceived value, competitiveness, and profitability.

### **Examples**

- Pricing strategy (e.g., value-based, cost-plus, competitive)
- Discounts and promotions
- Payment terms and financing options
- Psychological pricing (e.g., \$9.99 vs \$10)
- Bundling and unbundling
- Tiered or dynamic pricing
- Price elasticity analysis
- Price positioning (premium, mid-tier, budget)
- Channel-based pricing (DTC vs retail)

## **Question 34 | Price Objective**

## **Question 35 | Price Strategy and Target Audience**

## **Question 36 | Price KPIs**

## **Question 37 | Price Measurement Plan**

## **Question 38 | Price Tactics with Responsibilities, Timing and Budgets**

## **Question 39 | Total Budget, All Price Tactics**

## **Question 40 | ROMI for All Price Tactics: [Return On Marketing Investment (ROMI) for Price) = Gain – Budget / Budget X 100]**

# Create Your Objectives, Strategies, and Tactics To Address PLACE (DISTRIBUTION)

## **Place** (*Where and how the product is delivered*)

Defines how and where customers access your product.

### **Examples**

- Distribution channels (e.g., retail, online, wholesale, direct-to-consumer)
- Channel strategy (exclusive, intensive, selective)
- Location strategy (brick-and-mortar, geographic presence)
- E-commerce platforms
- Inventory management
- Logistics and supply chain
- Fulfillment and delivery options
- Retail merchandising
- Omnichannel experience
- Third-party marketplaces (Amazon, Wal-Mart, Etsy, etc.)

**Question 41 | Place (Distribution) Objective**

**Question 42 | Place (Distribution) Strategy and Target Audience**

**Question 43 | Place (Distribution) KPIs**

**Question 44. | Place (Distribution) Measurement Plan**

**Question 45 | Place (Distribution) Tactics with Responsibilities, Timing and Budgets**

**Question 46 | Total Budget, All Place (Distribution) Tactics**

**Question 47 | ROMI for Place (Distribution) Tactics: [Return On Marketing Investment (ROMI) for Place) = Gain – Budget / Budget X 100]**

## Section III | Develop a Marketing Budget Summary and ROMI

### Instructions for Marketing Budget Summary

Summarize the budgets to complete each marketing objective. Be sure to include the KPIs for each objective and the ROMI (Return on Marketing Investment).

#### ROMI formula

$$\text{ROMI} = (\text{Gain from Marketing} - \text{Marketing Investment}) / (\text{Marketing Investment}) \times 100$$

#### **Example:**

*If you spent \$50,000 on a campaign and generated \$200,000 in incremental revenue:*

$$\text{ROMI} = (200,000 - 50,000 / 50,000) \times 100 = 300\%$$

*This means you earned \$3 in revenue for every \$1 spent on marketing.*

Question 48 | Summarize for Each Objective: KPIs, Budget, and ROMI%

Objectives	KPI	Total Budget	ROMI %





TOTAL			

## Section IV | Executive Summary

### Executive Summary Background

An executive summary is important in a marketing plan because it provides a concise, high-level overview of the plan's most critical elements: objectives, strategies, tactics, target market, and expected results (KPIs).

It helps executives and stakeholders quickly understand the plan's purpose, priorities, and impact without reading the full document.

#### In short, it answers

- What are we doing, why, for whom, and what results do we expect?
- This makes it a vital tool for gaining alignment, approval, and support.

### Question 49 | Summary of Key Takeaways

- Recap the main objectives of the marketing plan.
- Reiterate the marketing strategy and how it aligns with company goals.
- Highlight core target audiences, positioning, and key tactics.

### Question 50 | Strategic Focus Areas

- Briefly outline the primary strategic priorities (e.g., brand awareness, customer acquisition, product launch, retention).
- Emphasize how these focus areas will drive growth or improvement.

### Question 51 | Expected Outcomes

- Summarize anticipated results from the plan (e.g., sales growth, number of new leads, market share increase).
- Reference any success metrics or KPIs introduced earlier in the plan.

### **Question 52 | Budget Summary and ROMI**

- Recap the budgets by objective and the expected ROMI for each objective.

### **Question 53 | Plan for Execution and Review**

- Mention who is responsible for implementing the plan.
- Identify timelines, checkpoints, or review processes to track progress.
- Include how adjustments will be made if goals are not met.

### **Question 54 | Closing Statement or Call to Action**

- End with a motivating statement that reinforces the company's commitment to execution.
- If the plan is being presented for approval, include a statement requesting feedback, endorsement, or resources needed.

#### **Example of Closing Statement**

*"With a clear strategy, defined goals, and a focused execution plan, this marketing roadmap positions us to drive measurable sales growth, strengthen our brand, and build lasting customer relationships. With support across teams and a commitment to agility, we're ready to turn this plan into results."*

## Section V | **Appendix**

Additional comments, acknowledgments or names of contributors to the plan, references for budgets, detailed calendars, or research.

# ADDENDUM

## Examples of Objectives, Strategies, and Tactics for:

- Promotion
- Product
- Price
- Place (Distribution)

## Example | Objective, Strategy, and Tactics Execution for PROMOTION

Promotion Objective	Increase sales to existing customers by 20% by the end of Year 1.
Promotion Strategy	Implement customer-focused promotional tactics that enhance loyalty, personalize engagement, and increase purchase frequency.
Target Audience	Existing customers (describe demographics TBD)
Promotion Key Performance Indicators (KPIs)	<ul style="list-style-type: none"><li>• 1,300 active participants in the loyalty rewards program</li><li>• \$500,000 in incremental revenue from promotional activities to existing customers</li></ul>
Promotion Measurement Plan	<ul style="list-style-type: none"><li>• Monthly reporting dashboards for loyalty metrics, sales lift, and campaign engagement</li><li>• Quarterly executive reviews to refine messaging and budget allocation</li><li>• ROMI evaluation on each tactic with optimization based on real-time data</li></ul>
Promotion Tactic	
Develop customer loyalty initiatives to deepen engagement and retention through exclusive benefits and personalization. <ul style="list-style-type: none"><li>• Launch tiered loyalty program offering points per dollar spent.</li></ul>	

- Provide early access to new products.
- Collect customer feedback via surveys.
- Use CRM data to personalize offers (e.g., birthday rewards, purchase history-based deals).

**Channels:** Website, mobile app, email, and in-store (if applicable)

**Target Audience:** Top 30% of existing customers by purchase frequency or value

**Tech/Tools:** CRM system, email automation platform, loyalty app integration

**Metrics to Track:** Loyalty enrollment rate, repeat purchase rate, customer satisfaction score

Responsibilities Teams	Timing	Budget
Marketing / Sales Teams	Launch in <b>Q2</b> , optimize in <b>Q3–Q4</b>	\$50,000

#### Promotion Tactic

**Implement incentives and bundles offers to drive immediate sales lift from existing customers.**

- Run monthly “Loyalty Week” promotions with 10–15% discounts.
- Create bundled packages of complementary products (e.g., buy 2 get 1 free).
- Introduce flash sales for loyalty members only.

**Channels:** Website, email, SMS, in-store signage

**Target Audience:** Loyalty program members and frequent buyers

**Messaging Focus:** “Thank you for being loyal — here’s your exclusive reward.”

**Metrics to Track:** Bundle sales volume, promo redemption rate, AOV (average order value)



Responsibilities Teams	Timing	Budget
Marketing / Sales Teams	Kick off in <b>Q2</b> , then monthly through <b>Q4</b>	\$100,000

#### Promotion Tactic

**Targeted Communications to reach the right customer with the right message to increase conversion.**

- Launch automated customer re-engagement campaigns (email/SMS).
- Use geo-targeted PPC (Pay Per Click) campaigns promoting exclusive offers.
- Create lookalike audiences based on loyal customer profiles.

**Channels:** Email, SMS, Direct Mail, Google Ads, Meta Ads

**Target Audience:** Lapsed customers, high-potential buyers, and segmented loyalty members

**Tools/Partners:** Digital ad agency, customer data platform, analytics tools

**Metrics to Track:** CTR (click-through rate), conversion rate, ROAS (return on ad spend)

Responsibilities Teams	Timing	Budget
Marketing / Outside Agency	Kick off in <b>Q2</b> , then monthly through <b>Q4</b>	\$50,000
<b>TOTAL BUDGET</b>		<b>\$200,000</b>
<b>ROMI*</b>		<b>\$150%</b>

\* Return On Marketing Investment (ROMI) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100

## Example | Objective, Strategy, and Tactics Execution for PRODUCT

Product Objective	Enhance product appeal and competitiveness to drive an increase in sales and customer satisfaction with products across key product lines by year-end.
Product Strategy	Focus new products and current products on customer-centric improvements, innovation, and portfolio optimization to meet evolving market needs.
Target Audience	<ul style="list-style-type: none"> <li>Existing Customers (describe demographics TBD)</li> <li>Conquest Prospects (describe demographics TBD)</li> </ul>
Product Key Performance Indicators (KPIs)	<ul style="list-style-type: none"> <li>Launch 2 new products by Q4</li> <li>Improve product satisfaction rating to 4.5/5 or higher</li> <li>15% increase in sales from existing customer base</li> <li>\$450,000 in incremental revenue from product activities</li> </ul>
Product Measurement Plan	<ul style="list-style-type: none"> <li>Quarterly product sales reports</li> <li>Monthly customer reviews</li> <li>Bi-annual competitor audits</li> </ul>
Product Tactic	
<p><b>Develop product improvements and refresh to increase product relevance and customer satisfaction through enhancements and upgrades.</b></p> <ul style="list-style-type: none"> <li>Conduct product usability testing with target customers in key demographic groups to identify pain points and improvement areas.</li> <li>Redesign product packaging to enhance shelf visibility, communicate core benefits more clearly, and reduce environmental impact.</li> <li>Modify formulations, features, or configurations based on aggregated customer feedback and competitor benchmarking.</li> <li>Use customer service interactions and online reviews to inform design tweaks and prioritization of product updates.</li> <li><b>Additional Consideration:</b> Use pilot tests or soft launches to validate improvements before rolling out at scale.</li> </ul>	

Responsibilities Teams	Timing	Budget
Marketing / Sales / Product Management Teams	Q1–Q2	\$35,000
<b>Product Tactic</b>		
<b>New Product Development that expands product portfolio to address unmet customer needs and capitalize on emerging trends.</b> <ul style="list-style-type: none"> <li>Collaborate with cross-functional teams (marketing, RandD, finance) to define value propositions and feasibility of concepts</li> <li>Prototype and test new product variations, collecting feedback from beta testers or early access programs</li> <li>Plan product launch with integrated marketing support and clear messaging aligned with brand values</li> </ul>		
Responsibilities Teams	Timing	Budget
Marketing / Sales / Product Management Teams	Q1–Q3	\$65,000
<b>Product Tactic</b>		
<b>Product Positioning and Messaging to strengthen perception of product value and create clearer customer understanding of differentiation.</b> <ul style="list-style-type: none"> <li>Revise product descriptions to focus on key benefits, use cases, and emotional triggers that resonate with target audiences.</li> <li>Develop comparison charts, product selector tools, and educational content to support informed buying decisions.</li> <li>Train internal teams and external retail partners on updated product narratives, competitive advantages, and FAQs.</li> <li>Align all communications with brand voice to maintain consistency across channels.</li> </ul>		
Responsibilities Teams	Timing	Budget
Marketing / Sales / Product Management Teams	Q3-Q4	\$30,000
<b>TOTAL BUDGET</b>		<b>\$130,000</b>
<b>ROMI*</b>		<b>246%</b>

\* Return On Marketing Investment (ROMI) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100

## Example | Objective, Strategy, and Tactics Execution for PRICE

Price Objective	Optimize pricing strategy to improve profit margins, pricing satisfaction, and average order value while maintaining overall customer satisfaction.		
Price Strategy	Adopt a value-based pricing approach, with bundling and dynamic pricing strategies.		
Target Audience	<ul style="list-style-type: none"><li>Existing Customers (describe demographics TBD)</li><li>Conquest Prospects (describe demographics TBD)</li></ul>		
Price Key Performance Indicators (KPIs)	<ul style="list-style-type: none"><li>8% increase in average profit margin</li><li>90%+ price satisfaction</li><li>5% increase in average order value</li><li>\$320,000 in incremental revenue from pricing activities</li></ul>		
Price Measurement Plan	<ul style="list-style-type: none"><li>Monthly margin dashboards</li><li>Customer price feedback</li></ul>		
Price Tactic			
<b>Create price optimization and testing to align pricing with perceived customer value while maintaining market competitiveness.</b> <ul style="list-style-type: none"><li>Regularly review competitor pricing across channels using monitoring tools and mystery shopping.</li><li>Run pricing tests in digital outlets to assess customer price sensitivity and willingness to pay.</li><li>Adjust prices based on geographic or demographic segmentation where appropriate.</li><li>Collect and analyze customer feedback related to perceived value and pricing fairness.</li></ul>			
Responsibilities Teams		Timing	Budget
Marketing / Sales / Finance Teams		Q1–Q2	\$40,000
Price Tactic			
<b>Develop bundled pricing offers to encourage cross-sell and upsell behavior to increase overall order size and perceived value.</b> <ul style="list-style-type: none"><li>Develop themed bundles (e.g. Starter Kits, Seasonal Sets) with promotional pricing and clear value messaging.</li><li>Promote bundled offers through email campaigns, on-site banners, and influencer partnerships.</li><li>Highlight total savings and complementary product benefits to reduce decision friction.</li></ul>			

Responsibilities Teams	Timing	Budget
Marketing / Sales / Finance Teams	Q1–Q3	\$30,000

#### Price Tactic

**Create a dynamic pricing model to respond to changes in customer demand, inventory levels, and seasonality to maximize revenue.**

- Implement pricing tools to adjust prices automatically based on real-time data signals.
- Establish price floors and ceilings to ensure brand consistency and profitability safeguards.
- Monitor performance and fine-tune rules for specific categories or channels.

Responsibilities Teams	Timing	Budget
Marketing / Sales / Finance Teams	Develop Q1, then implement ongoing	\$30,000

TOTAL BUDGET		\$100,000
ROMI*		220%

**\* Return On Marketing Investment (ROMI) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100**

## Example | Objective, Strategy, and Tactics Execution for PLACE (DISTRIBUTION)

Place (Distribution) Objective	Expand access and convenience to increase total sales through channel optimization and regional growth.
Place (Distribution) Strategy	Utilize omnichannel distribution and regional partnerships to improve availability and reach.
Target Audience	<ul style="list-style-type: none"> <li>Existing Customers (describe demographics TBD)</li> <li>Conquest Prospects (describe demographics TBD)</li> </ul>
Place (Distribution) Key Performance Indicators (KPIs)	<ul style="list-style-type: none"> <li>10% increase in total sales</li> <li>20% increase in e-commerce conversion</li> <li>3 new regional distributors added</li> <li>\$600,000 in incremental revenue from pricing activities</li> </ul>
Place (Distribution) Measurement Plan	<ul style="list-style-type: none"> <li>Sales by region and channel</li> <li>Conversion and abandonment tracking</li> <li>Distributor and dealership performance reviews</li> </ul>
Place (Distribution) Tactic	
<p><b>Create an omnichannel expansion to deliver a seamless and consistent customer experience across digital and physical touchpoints.</b></p> <ul style="list-style-type: none"> <li>Upgrade e-commerce infrastructure to support faster load times, responsive design, and intuitive navigation.</li> <li>Integrate inventory systems to enable real-time availability across stores and online.</li> <li>Offer flexible fulfillment options such as BOPIS (Buy Online, Pick Up In Store), same-day delivery, or locker pickups.</li> <li>Ensure brand consistency across all customer interfaces, both digital and in-store.</li> </ul>	

Responsibilities Teams	Timing	Budget
Marketing / Operations / Sales Teams	Q1–Q2	\$80,000
<b>Place (Distribution) Tactic</b>		
<b>Expand regional markets to increase market penetration and brand visibility in underserved or high-growth geographic areas.</b> <ul style="list-style-type: none"> <li>Conduct a regional demand analysis using sales and population data to prioritize high-potential markets.</li> <li>Establish relationships with local distributors, retailers, or service partners to facilitate entry.</li> <li>Localize product messaging and promotions to align with cultural and seasonal preferences.</li> </ul>		
Responsibilities Teams	Timing	Budget
Marketing / Operations / Sales Teams	Q1–Q3	\$100,000
<b>Place (Distribution) Tactic</b>		
<b>Create marketplace optimization to maximize visibility and sales performance on third-party platforms such as Amazon and Walmart.</b> <ul style="list-style-type: none"> <li>Optimize product listings with high-quality images, keyword-rich descriptions, and detailed specs.</li> <li>Use sponsored product ads and seasonal deal campaigns to drive traffic and conversions.</li> <li>Monitor and respond promptly to customer reviews and QandA to build trust and improve seller ratings.</li> </ul>		
Responsibilities Teams	Timing	Budget
Marketing / Operations / Sales Teams	Kick off in Q2, then monthly through Q4.	\$30,000
<b>TOTAL BUDGET</b>		<b>\$210,000</b>
<b>ROMI*</b>		<b>186%</b>

\* Return On Marketing Investment (ROMI) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100

## More on Targeted Communications Tactics

**When developing targeted communications, consider a multi-channel approach to reach the audience and maximize your promotion's visibility**

A multi-channel approach to targeted communications can deliver tailored messages to specific customer segments. Different individuals prefer to receive information through various channels, and a multi-channel approach will meet customers where they are most receptive. Benefits include higher engagement rates, increased brand loyalty, and better conversion rates. Small businesses should prioritize the channels that match their audience, budget, and capacity to maintain. A focused strategy using email, social, website, SEO, and some local paid advertising can be very effective. As they grow, they can test or expand into additional channels.

## Communications Channel Tactics Examples

### Communications Tactics for Business to Consumer (B2C) Companies

These are practical, affordable for small B2C businesses, and offer high ROI when used well:

- **Email marketing** – Cost-effective, easy to automate, great for nurturing
- **SMS/text messaging** – Good for reminders, promotions, and loyalty
- **Website** – A must-have hub for credibility and conversions
- **Conversational marketing** – Chatbots, live chat, AI-driven conversation flows
- **Event marketing** – Trade shows, webinars, retail events, conferences (in-person and virtual)
- **Social media** – Free or low-cost brand visibility and customer engagement
- **Google Business Profile** – Crucial for local SEO and search visibility
- **SEO (basic)** – Helps customers find you organically; local SEO is especially important
- **Paid digital ads** – Start small with Facebook/Instagram or Google Ads
- **Printed materials** – Brochures, business cards, or flyers for local reach
- **Direct mail** – Targeted campaigns can work well for local or repeat customers



- **Publicity** – Includes usually free or low-cost press releases, local new coverage, community involvement, sponsorships, charity involvement, educational workshops, and awards and recognition
- **Content marketing** – Blogs, videos, or FAQs to build trust and improve SEO

## Communications Tactics for Business-to-Business (B2B) Companies

For a B2B small business, cost-effective and practical communication channels should focus on credibility-building, relationship development, and lead nurturing, rather than mass reach. Here's a prioritized list for B2B:

- **Email Marketing** – Still one of the highest ROI channels in B2B. Use it for nurturing leads, newsletters, promotions, and follow-ups.
- **Website (with SEO and Content)** – Your digital storefront is essential for trust and conversions. Use it for capturing leads (forms/Call-To-Actions), showcasing services, and publishing case studies or blog content.
- **LinkedIn** – The most powerful B2B social platform. Use it for building authority, connecting with decision-makers, sharing industry content, and messaging leads. Do regular posting, commenting, and direct outreach to target companies.
- **Webinars / Virtual Workshops** – Educates potential customers while positioning you as a subject matter expert. Use it for lead generation and product education. Tools include Zoom, Google Meet, Eventbrite (for RSVPs).
- **Search Engine Optimization (SEO)** – Long-term visibility for specific searches. Use it for ranking for keywords like “IT support for law firms” or “wholesale cleaning products.”
- **Google Business Profile (if location-based)** – Increases local visibility, especially for services. Use it for showing up in Google Maps and Search, posting updates, and collecting reviews.
- **Targeted Paid Advertising (Low Budget)** – Great for boosting visibility to the right audience quickly. Use it for retargeting visitors or targeting niche B2B segments. Tools: LinkedIn Ads (great for job title targeting), Google Search Ads (if high-intent keywords).
- **Publicity** – Consider trade publications or local business news coverage.
- **Event marketing** – Trade shows, webinars, customer events (open house), conferences (in-person and virtual).

- **Training** – Training events for customers about the technology and how to use your products can enhance customer loyalty, drive sales, and generate new customers.

# BUILD YOUR MARKETING PLAN WITH EASY-TO-USE AI POWERED ONLINE FORMS AND INSTRUCTIONS

This resource provides a structured framework, promotes goal setting, encourages strategic thinking through SWOT analysis, and offers practical, fillable online templates, powered by AI, to aid in creating actionable marketing plans within budget.

This guide is more than a worksheet. It's a roadmap that empowers your business to plan smarter, improve market presence, and increase sales.

---

**Marketing Convergence Solutions** | [www.convergencestrategies.com](http://www.convergencestrategies.com)  
[Info@convergencestrategies.com](mailto:Info@convergencestrategies.com) | Vero Beach, Florida 32967