

Marketing Planning Process

Organization:

Date:

Goal Setting	
Mission:	What do we do today? Who do we serve? What are we trying to accomplish? What impact do we want to achieve?
Vision:	Where are we going moving forward? What do we want to achieve in the future? What kind of future society do we envision?
Values:	What do we stand for? What behaviors do we value over all else? How will we conduct our activities to achieve our mission and vision? How do we treat members of our own organization and community?

Business Goals and Objectives

Goals:

Broad outcomes that the organization wishes to achieve

Objectives:

Clearly defined and measurable steps that are taken to meet the broader goal(s).

Analyzing the Current Situation

Marketing Audit & Analysis:

Review & Assess...

Tools used: brochures, printed newsletters, newspaper, e-newsletters, email, social media, radio, television, telephone, etc.

Tool and audience matching

Quality and effectiveness of the tools used

Distribution methods & frequency

Target Market - gaps

Partnerships – gaps

“Word of mouth”

Market Assumptions:

Beliefs and expectations that you have about your target market, your value proposition, your channels and your goals. Assumptions can lead to errors and missed opportunities if they are not validated or updated.

S.W.O.T. Analysis

Ideas to brainstorm! Are the below topics a “Strength” or a Weakness?

Demographics, location – close to cultural, community & healthcare resources, on a main road, easy to find?

Physical Facility – first impressions, age & condition of interior & exterior, updates needed. Size of the space for clients.

Services offered – dining, activities, transportation, recreation, social, spiritual, intellectual activities, pool, etc.

Care – survey results, niche programs, training, technology

Staffing/Team – stability, experience, turnover, leadership, culture, mission, vision, values, etc.

Other – reputation, customer service, friendliness, community engagement, history of community (who built it & why?)

Strengths:

What do we do well?

What have our clients told us they like about us? (surveys, focus groups)

What have our partners told us they like about us?

What’s unique about our services and programs?

Other?

Weaknesses:

What can we improve?

What are our clients dissatisfied with? (surveys, focus groups)

What are our partners dissatisfied with? (surveys, focus groups)

Where do we fall behind with our services and programs?

Where do we have fewer resources?

Other?

Ideas to brainstorm! Are the below items an “Opportunity” or a “Threat”?

Marketplace Changes – new communities in development, businesses coming or going?

Partner Changes – have key referral sources moved, are there new or old relationships that have to be nurtured?

Opportunities:

Outreach to new areas

What emerging trends can we take advantage of?

Which of our strengths might be valuable to potential partners?

Other?

Threats:

What market trends are we unprepared for?

Where are you experiencing increased costs?

Are you experiencing staff turnover and/or decreased volunteers?

Other

Creating the Marketing Strategy

Marketing Objectives & Strategies:

What the marketing function wants to achieve (consistent with business objectives) and how it intends to do it.

Forecast of Expected Results:

Analysis to predict the potential success of specific marketing efforts. The purpose is to ensure that a business focuses on the proper marketing and advertising activities across channels and spends time and money wisely.

Alternative Plans:

If expected results are not being met to satisfaction, review, revise and renew the plan.

Allocating Marketing Resources and Monitoring

Marketing Budget:

Create detailed budget for the year and an outline budget for each month

Marketing Action Plan

GOAL Specific, measureable objectives to be accomplished in a time-period.	TARGET Specific, reachable segments of the target market with similar needs, interests, motivations, demographics, locations, etc. How many organizations/people are there in each segment?	STRATEGIES Strategies that will attract the specific people or organizations you're trying to reach with a compelling offer that meets their interest/needs.	TACTICS/MESSAGES Tools or channels you'll use to reach your targets. What's unique and special about your services, bio, history that will connect with people? Which messages will be persuasive?	CALENDAR Specify which activities you will do daily, weekly, monthly or quarterly to achieve your goals.	MEASUREMENT How will you track results? How will you compare the effectiveness of each tactic? How will you calculate time/money/#of contacts it takes to attract/retain clients?