# <Company> Simple Marketing Plan

## Executive Summary

Summarize the most important parts of your marketing plan. Often comprised of 2-3 paragraphs and a bulleted list of goals.

Primary goals for the term include:



## Situation Analysis

Understanding who you are and how your business fits into the landscape in which you operate is core to business success, and a situational analysis can help clarify these items for you. Consider including the following three sections at a minimum.

### Vision & Mission

List your company’s vision and mission statements here to help keep all your planning efforts focused and in line with core company values and priorities.

### Market Overview

Identify the overall size of your marketplace and core trends that will affect customer’s purchase behaviors in the term of the plan. You should source this information from industry experts and analysts—not assume you know based on your own experience!

### SWOT

Strengths

External

Internal

Weaknesses

Threats

Opportunities

Negatives

Positives

Business schools have long encouraged leaders to periodically assess their business and to adjust strategies according to circumstances. One of the simplest models for this assessment is known as SWOT—standing for strengths, weaknesses, opportunities, and threats. The SWOT analysis encourages owners to think on two dimensions. As shown, leaders should consider positives and negatives both internally and externally.

## My Customer

Provide a profile of your customer and the needs, goals, and problems you help them address.

### Target Markets

Identify and explain why you’re targeting each. Generally, you don’t want more than 4-5 target markets and may only have one, if your business is highly specialized or external market conditions make one option unusually attractive during the term of this plan.

Describe important qualities of each target market and list 3 primary messages (claims) that your research indicates will help you successfully reach, educate, and convince prospects for each target market to buy from you.

### Target Accounts

Identify specific accounts you will win business from in the plan term. Do not skimp on your analysis here. Which businesses in your target markets are realistic prospects for what you offer? What problems is each struggling with that you can solve? Who is the primary point of contact? Where are they in the purchasing cycle or will you be initiating a cold conversation early in the plan term? Be sure to consider both new accounts and opportunities to upsell or expand product usage for organizations with whom you already have a relationship. You should be able to identify 5-10 target accounts for each period of the plan term and may have more if they are needed to help you meet financial goals. For each, offer a realistic probability for close. If you have not yet spoken to the account, this should be 0%.

**New**



**Upsell**



## Goals

Your marketing plan should include specific, measurable goals, so that you can periodically assess your progress toward company goals. Stick with no more than 3-5 goals and be specific in numbers (i.e. $ revenue increase, % market share gain, # new customers, etc.), and timeframe. Set some goals that will be accomplished during the term of the plan, or express them in quarterly increments, so you can monitor progress and adjust goals as you go, if they are not realistic.

## Tactics

Most people are familiar with the Four Ps of Marketing: product, price, promotion, and place. You should identify at least 2-3 specific tactics to execute during the plan period for each of these areas.

### Product

Regarding your relationship with Digitech Systems, consider what additional products or product information you need to be successful. What technical product training does your organization need from your CDM? Would you benefit from sending staff to a more formal training offered by Digitech Systems such as PaperVision® Capture Training (includes Forms Magic) or PaperVision® Enterprise Certification Training, or perhaps Digitech Systems University?

Another aspect to this area to consider is how you work with Digitech Systems’ Professional Services (PS) to extend your technical capabilities in order to meet more complex customer needs and close more business. If you’re not sure what PS can do for you, reach out to your CDM.

Potential tactics to consider:

* Attend Digitech Systems training event
* Professional Services overview
* Contract with PS for customization work in order to close 5 new customer accounts

### Price

How are you pricing products against your marketplace? Since Digitech Systems doesn’t regulate reseller pricing, you’ll need to conduct your own research. Your prices should be consistent with your branding strategies. Are you a luxury (high value/high price), mid-market (standard value, reasonable price) or low market (bare bones product/low price) option? DSL’s product lineup can be designed to meet all of these needs and you may have more than one pricing strategy for different markets.

Potential tactics to consider:

* Pricing strategy assessment
* Build new pricing schedule that more closely matches brand strategy
* Build pricing strategies for bundled products/services (i.e., PaperFlow + ImageSilo, PaperVision Capture + Forms Magic)

### Promotion

Promotion is more than simply advertising. It encompasses all marketing activities that target building brand recognition and brand strength. You will need to build the brand of your own organization as well as the brands of the products you represent for best effect on your marketplace. Consider all of the following areas.

**Digital:**

Includes web, social, and email strategies. One of the least expensive ways to reach out to prospects and maintain relationships with existing customers, but be careful because these strategies are saturated. Find ways to be both relevant and entertaining for best effect. Remember visual and multimedia content are more effective than text-heavy blog posts and email campaigns.

**Print:**

Print is expensive, but as consumers respond to digital saturation by ignoring these options, mailers, posters, case studies, and old-fashioned advertising are making a comeback in terms of effectiveness. Carefully consider how these options can help you build brand. Vet outlets carefully, as prices vary widely. Finally, ensure a tight match to your market targets.

**Presence:**

Events like tradeshows, lunch and learn seminars, and customer appreciation occasions (which are good for upselling) offer significant relationship benefits but can come at a steep price. Ensure you have a strategy for any such events and that you clearly define and then measure desired outcomes.

Potential tactics to consider:

* Upgrade your web presence with more multimedia and visual content
* Build social profiles and repost articles from favorite authors and publications as well as Digitech Systems
* Choose tradeshows to attend and schedule at least one customer/prospect event during the plan term

### Distribution

For most resellers, distribution will be the implementation and customer service functions of your business. Where might you expand your reach through partnerships with other technologies or providers? How can you leverage innovative implementation and customer service processes to reduce your costs while building better results?

Potential tactics to consider:

* Assess implementation strategies and see where streamlining processes may save money and get customers up-and-running faster
* Assess customer service strategies and identify areas for improvement
* Identify and pursue 1-2 opportunities for technology partnerships that will strengthen your reach to your target audiences

### Calendar of Activities

Displays the tactics described above in a calendar-based format, to simplify your ability to keep your eye on what is most important, and to ensure you’re not trying to do too many things at one time. Spread tactics out throughout the plan term for best effect.

## Budget

Make a list of costs for tactics identified above. Do not forget to include the cost of research and expert consultants in addition to fees for activities. It can be helpful through the term of the plan to measure the cost per lead generated by dividing the costs associated with each activity by the number of leads generated. You should always compare the revenue generated against the cost of each activity. High value/high return activities should be repeated. Those that outlay more than they bring in should be refurbished or eliminated.