

*ANNUAL MARKETING  
PLAN*

Fiscal Year 2019

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## *Executive Summary*

This section is for you to talk about the overall marketing goals for the year. What are you trying to achieve? What would a person reading this learn from it? How should the document be used?

## *Target Customers*

Audiences, personas, and client profiles are all ways to say who you would like to sell to. Now, of course, you would like to sell to someone who wants to buy. But try to get as specific as possible here. Really think about who currently buys from you and what they have in common. If you are in professional services, are most of your clients in the same 3-4 industries? If you sell directly to consumers, do most of your customers fit into a few categories by demographics or interest? These are your target customers.

## *Unique Selling Proposition*

What do you do better than anyone? How do you know? This isn't a section for what your company aspires to be. It is a section for what customers perceive you doing better than anyone. For example, most businesses believe they deliver excellent customer service. However, some have internal surveys and online reviews that tell a different story. What would a target customer say you do better than anyone else? That's your unique selling proposition. Be specific, be honest, and be as concrete as possible.

## *Pricing and Positioning*

Where do your prices fall within your service market? Are you positioned as a luxury brand or a value brand? Does this positioning reflect your pricing? There is no right or wrong answer here. Your marketing structure, strategy, and channels will likely look different if your product/pricing is luxury or value or something in between. What is important is that they align to ensure consistent messaging and marketing. This is about discovering strengths and owning your position within your service area, not trying to be like a competitor that is doing something differently than you.

## *Distribution Plan*

How do your customers buy from you? Online? In person? Through sales development professionals? Through distributors? Think through all the potential ways customers or clients can buy from you and address any upcoming changes here. Maybe this is the year you embrace e-commerce. Or maybe this is the year that you hire a sales professional for your startup.

Distribution Channel	% of Overall Sales	Growth Goal	Initiatives
E-Commerce	30	50%	SEO
Retail Location	70	15%	Events
Second Location	0		Open location

## Promotions/Offer Schedule

Typically, this follows your sales season and is broken down quarterly or monthly, depending on your buy cycle. If you are in B2B and buying decisions take months, promotions are quarterly. If B2C retail, promotions can last a single day. Here are two examples.

B2B Promo Calendar

Quarter	Offer	Duration	Audience	Goal	Channels
<b>First</b>	Free Audit	Quarter	Trade Show Attendees	15 Leads	Booth, Email, Postcard, Sales
<b>Second</b>	Free Webinar	Quarter	Site Visitors	15 Leads	Email, LinkedIn, Website, Remarketing
<b>Third</b>	10% for Referrals	Quarter	Previous Client Contacts	30 Leads	Email, Sales, Previous Clients
<b>Fourth</b>	15% off Service	Quarter	Current Clients	95% client retention	Website, Email, Service Dept, LinkedIn

B2C Promo Calendar

Month	Offers	Duration	Details	Goal	Channels
<b>January</b>	Free Blowout w/ Cut/Color	All Month	New clients get a future blowout with a completed cut/color	25 New Clients	FB/Insta, Website, Radio
<b>February</b>	15% off mani/pedi	Feb 1-13	Valentine's Day	30% More Mani/Pedi	FB/Insta, Website, Radio, Email
<b>March</b>	10% Waxing	All Month	Spring Break Prep	40% More Waxing	FB/Insta, Website, Radio, Email
<b>April</b>	15% Off Referrals	All Month	Discount for current clients when referral of new client	20 New Clients	FB/Insta, Website, Radio, Email

## *Marketing Materials Production*

Take stock of current swag/marketing materials. What can be re-used? What do you need to plan for or order this year? This can be as simple as a new brochure or as complicated as swag for 150 trade shows in 6 industries.

Current Swag Stock

Metal Pens: 115

Post-Its: 75

Magic 8 Balls: 17

Bluetooth Speakers: 1

Canvas Bags: 6

Sunglasses: 22

Tattoos: 750(ish)

Notepads: 500

<b>Item</b>	<b>Event/Initiative</b>	<b>Qty</b>	<b>Budget</b>	<b>Reorder?</b>
<b>Heart Free Shirts</b>	New Client Bags	100	800	Y
<b>Post-Its</b>	New Client Bags	500	250	Y
<b>Metal Pens</b>	New Client Bags	500	750	Y
<b>Fanny Packs</b>	Christmas Gift	75	750	
<b>Brochures</b>	Pitch	150	750	
<b>Trucker Hats</b>	Christmas Gift	75	750	

## Marketing Channels

This is where you define the channels and budgets for your annual marketing efforts. By this point in the plan, you know what you will need to create/buy/promote throughout the year. This section is about how the budget and efforts break down into different marketing channels.

Channel	Manager	Annual Budget	New Creative
Print	Susan	\$10,000	Monthly, Due 15th
Billboard	Susan	\$15,000	Quarterly
Radio	Susan	\$10,000	Monthly
Website Maintenance	Drew	\$1,500	New Banners Quarterly
Email	Drew	\$2,000	2x Month
Social Media – LI, FB, Insta	Drew	\$12,000	2x Month
SEO	Drew w/Consultant	\$10,000	2x Month
Search Ads	Drew w/Consultant	\$25,000	Ongoing
Trade Shows	Paul	\$75,000	N/A
Networking	Susan	\$5,000	
Community Donations	Susan	\$5,000	



## Advertising Schedule

Further definition of the schedule for all the marketing channels that are advertising. Are you going to spread your budget for the channel evenly throughout the year or (more likely) you will spend more at specific times than at other times. If you have this for a whole year in advance, you will have more buying power with your advertising partners. You don't need to know the creative yet to know how much of your budget should be used for that initiative. It cross-checks your budget and, if you fill in the table with your creative throughout the year, you have a record of what you've done. So next year isn't as difficult – you can refresh what worked and ditch what didn't.

### Radio Ad Schedule Breakdown Example

Times	Creative	Budget
January 1-15	It's a New You! Free Blowout with cut/color	\$400
January 16-31	Don't Miss Out! Free Blowout with cut/color	\$400
Feb 1-13	15% Off Mani/Pedi for Galentine's Day	\$700
	Valentine's Day is coming! Be ready to the tips of your toes	

## *Conversion Strategy*

We often leave this out of our marketing plans and it is essential, especially for those who manage sales and marketing together. How do we turn our leads into sales? What are we doing when people call? Walk into the shop? Contact us through our website? How can this be improved in the next year?

## *Partner/Referral Strategy*

This is where networking and partner networks come into place. It is also where you discuss how to utilize a current client or customer base to increase sales.

## *Retention Strategy*

Gaining new customers or clients is incredibly expensive. It is easier to retain your customer base. Retention is essential to growth. This is the opportunity to discuss marketing tools like loyalty and referral programs, brand ambassador programs, client thank you gifts, and pop-up promotions for your current clients.