

MARKETING PLAN TEMPLATE

This template is designed to help you create a plan that helps you focus your goals, understand your audience, and turn ideas into purposeful action.

It guides you through the key elements of an effective marketing strategy, from defining your messaging, selecting the right channels and measuring success.

Work through each section in order, building your plan step by step.



PRINCIPLES TO KEEP IN MIND

START WITH PEOPLE

The stronger your understanding of your audience, the stronger your marketing will be.

KEEP IT FOCUSED

Prioritise the activities that will have the greatest impact.

STAY CONSISTENT

When your identity and experience align, people find it easier to remember and trust you.

MEASURE WHAT MATTERS

Use data and insight to guide decisions, not assumptions.

01 UNDERSTAND YOUR CURRENT POSITION

Review your organisation, market, competitors and audience.

02 SET CLEAR OBJECTIVES AND DEFINE SUCCESS

Define what success looks like and how you'll measure it.

03 CLARIFY YOUR AUDIENCE AND VALUE

Understand what people need and why they should choose you.

04 BUILD YOUR MESSAGING AND ACTIVITY PLAN

Select the right channels and activities to achieve your objectives.

05 MEASURE AND REFINE THROUGHOUT

Track performance, review results, refine and adapt as priorities evolve.

ORGANISATION / BRAND:

PREPARED BY:

DATE:

TIME PERIOD COVERED:

01 UNDERSTAND YOUR CURRENT POSITION

Review your organisation, market, competitors and audience.

1.1 WHERE ARE YOU TODAY?

What's your current position? Reflect on recent performance, what's changed recently and areas for improvement.

CONSIDER:

- How has performance been over the last year?
- What's changed internally?
- What should you be building on?
- Where are the gaps or challenges?

1.2 WHAT'S HAPPENING AROUND YOU?

Review what trends, shifts or changes are influencing your market, your audience, or the way people make decisions.

CONSIDER:

- What has changed in your sector?
- How are customer expectations evolving?
- Are there emerging opportunities or risks worth noting?

1.3 WHAT IS YOUR COMPETITION?

Check what's already being said and what opportunities exist to stand apart.

CONSIDER:

- Who are your top 2-4 competitors?
- What do they talk about?
- How do they position themselves?
- Where might there be space to do something different?

02 SET CLEAR OBJECTIVES AND GOALS

Define what success looks like and how you'll measure it.

2.1 PRIMARY OBJECTIVES

Objectives should be clear, realistic, measurable and time-bound. Setting these at the beginning help measure what success looks like internally. Add KPIs to each objective to tie it to a measurable goal.

EXAMPLES

- **Activity/Campaign:** Awareness Campaign
- **Objective:** Increase brand visibility
- **KPI:** Website visits
- **Target:** 10k visitors per month

[illegible]

03 CLARIFY YOUR AUDIENCE AND VALUE

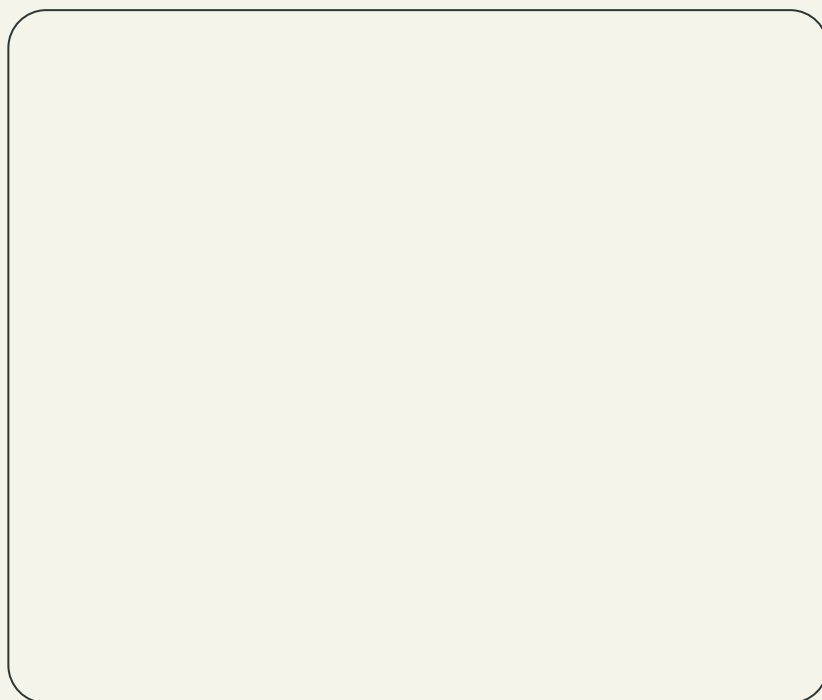
Understand what people need and why they should choose you.

3.1 PRIMARY AUDIENCE

The strongest marketing starts with understanding people and who your core clients or customers are.

CONSIDER

- What matters to them?
- What pressures are they facing?
- What are they really looking for?
- What are their key pain points?
- What are their preferred channels and platforms to use?



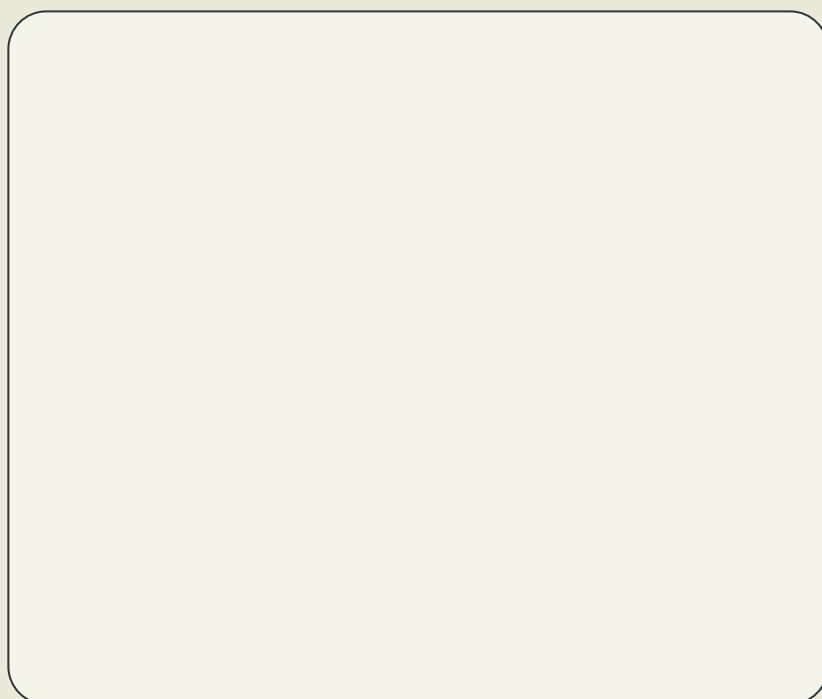
3.2 WHY PEOPLE CHOOSE YOU

What motivates clients to choose your offering?

Consider what builds confidence, creates trust and ultimately helps someone decide that you're the right choice. Think about both practical considerations and emotional drivers.

EXAMPLES

- Trust and credibility
- Proven results
- Reputation and word of mouth
- Quality of service or experience
- Value for money
- Expertise and knowledge



04 BUILD YOUR MESSAGING AND PLAN

Select the right channels and activities to achieve your objectives.

4.1 CORE POSITIONING

Craft a succinct statement articulating why clients should pick you. If someone asked why your organisation is worth paying attention to, could everyone give the same answer? A strong value proposition explains who you help, and why you're uniquely placed to do it.

CONSIDER:

- What do we stand for? What makes us different?
- What should every communication reinforce?
- What tone of voice do you use?
Clear / Warm / Assured / Informative
- [AUDIENCE] achieve(s) [DESIRABLE OUTCOME]
by [YOUR UNIQUE APPROACH].

4.2 SUPPORTING MESSAGES AND BENEFITS

What are the strongest reasons someone would choose you over the alternatives?

EXAMPLE:

Message: Our community is welcoming and inclusive.

Proof: High parent satisfaction scores and strong pupil retention rates.

MESSAGE / BENEFIT	PROOF POINT

04 BUILD YOUR MESSAGING AND ACTIVITY PLAN

Select the right channels and activities to achieve your objectives.

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4.3 CHANNELS & ACTIVITY

Where will you reach your audience and why? Consider which channels and platforms most of your audience use and what role does each activity play in the customer journey.

[illegible]

04 BUILD YOUR MESSAGING AND ACTIVITY PLAN

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4.4 BUDGET & RESOURCES

What investment is needed to deliver this plan successfully? Use this section to sense-check the available budget, allowing for contingency.

[illegible]

05 MEASURE AND REFINE THROUGHOUT

Track performance, review results and adapt as priorities

Track performance, review results and adapt as priorities evolve.

5.1 SUCCESS MEASURES

Which metrics will tell you whether your plan is working?

Objective: Increase brand awareness | **KPI:** Website Traffic

Target: 10k visitors p/month | **Current performance:** 7.5k visitors p/month

[illegible]

05 MEASURE AND REFINE THROUGHOUT

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5.2 REVIEW & REFLECTION

Mid-campaign and at the end of each quarter, ask the below questions to reflect on performance and refine each campaign as needed.

CAMPAIGN/ACTIVITY	
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WHAT'S WORKING?

WHAT'S NOT WORKING?

WHAT SURPRISED US?

WHAT SHOULD WE DO NEXT?