# Basic Elements of a Marketing Plan

## I. Situation Analysis

a. External Environment
   i. Regulatory
   ii. Political
   iii. Economic
   iv. Social
   v. International

b. Corporate Review
   i. Mission statement, corporate vision, strategic intent
   ii. Corporate plan
   iii. Long term goals
   iv. Objectives such as profit, ROI, share price
   v. Organizational chart

c. Product Category Review
   i. General description (life cycle state, needs/wants specified)
   ii. Sales trends (years, seasonality, share of major brands)
   iii. Distribution profile
   iv. Pricing overview
   v. Packaging overview

d. Competitive Analysis
   i. Description of major competitors’ strengths/weaknesses
      1. product
      2. distribution
      3. pricing
   ii. Brand positioning and advertising
      1. media spending (by medium, seasonality)
      2. sales promotion (trade vs. consumer)
   iii. Anticipated major programs (new/improved brands, new territories, changes in distribution, pricing, marketing communication)

e. Consumer Analysis
   i. Customers/buyers vs. consumers/users (and influences)
   ii. Demographics and psychographics
   iii. Purchase rate
   iv. Brand loyalty analysis
   v. Difference between brand and category users

f. Brand Review
   i. Current positioning, sales trends, performance test results, awareness, pricing history, distribution history, marketing communication history, stage in brand life cycle, source of additional business

## II. Problems and Opportunities

a. SWOT
   i. Internal Strengths and Weaknesses
   ii. External Threats and Opportunities

b. Opportunity analysis

c. Problems

## III. Strategic Planning: The Basic Decisions

a. Marketing objectives (sales; share)

b. Marketing strategies
c. Targeting and segmenting
d. Identification or competitive advantage
e. Positioning and branding

IV. **MARKETING MIX OBJECTIVES, STRATEGIES, AND TACTICS**

a. Product
   i. Objectives (brand/line extensions, improvements, deletions)

b. Place (distribution)
   i. Objectives (penetration, type outlets, geography, service level)
   ii. Channels
   iii. Warehousing
   iv. Retailing

c. Pricing
   i. Objectives

d. Promotion (communication)
   i. Personal selling
   ii. Advertising
   iii. Sales promotion
   iv. Packaging
   v. Direct marketing

V. **CONTROL AND EVALUATION**

a. Forecasting
b. Budgeting
c. Scheduling and Timing
d. Evaluation