

Company Name

MARKETING PLAN

Prepared for:

[SPECIFY]

Prepared by:

Name
Title

[DATE]

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EXECUTIVE SUMMARY

The Executive Summary is a synopsis of the entire marketing plan. Since some investors only read this section to determine whether they should spend more time evaluating your plan (and company), it should highlight the main elements of your plan and business strategy, and create a desire to read the rest of the document.

Briefly summarize the following:

- Current Situation, Company Mission & Objectives
- Product/Service Description
- Marketing Objectives
- Major Marketing Programs & Strategy
- Expected Marketing and/or Financial Results
- Keys to Success

The subjects above should contain the answers to the following questions:

- Who? (who is your company? who is target customer?)
- What? (what is the product or service offered?)
- Where? (where is your market located? where will you be implementing your marketing activities?)
- When? (when will your plan be implemented? when do you expect the results?)
- How much? (how much profit, sales, ROI to you expect?)

1. SITUATION ANALYSIS

1.1 Industry Analysis

1.1.1 Market Characteristics

- Market size (in dollars and/or production units) and growth rate (annual rate in percentage) by geographical region or sales territory
- Market potential, industry/expert forecasts
- History of market (how it has evolved), market stage (e.g. new market, mature market, etc.)
- Industry structure
- Level of competition, dominant players, presence of conglomerates, noticeable past failures, noticeable new entries
- Trends in supply and demand

1.1.2 Trends and Drivers

- Major industry trends, fashion and fads
- Major drivers of change
- Changes in use of product
- New categories of product users
 - Based on demographics such as age, gender, income, education, occupation, etc.
 - Based on psychographics such as benefits desired, habits, values, attitudes, lifestyle, behavior, opinions, etc.
- Demand cycles, seasonality effect (summer vs. winter), special occasions, and worldwide events

1.1.3 Legal, Political & Economical Factors

- Present and future laws and policies affecting your business and market
- Presence of government agencies and regulating bodies
- Corporate tax shelters
- Government spending
- Effects of taxation, inflation, monetary policies (e.g. interest rates), exchange rates
- International trade developments (e.g. FTAA, EU, etc.)
- Political climate (e.g. stable, war setting, etc.) and stability of government

1.1.4 Sociocultural Factors

- Lifestyle and sociocultural changes
- Environmental concerns
- Changes in use of disposable income
- Living conditions (amenities, utilities, pollution)
- Level of social mobility (movement of individuals from one societal class to another)
- Degree of rural migration (movement of population from rural areas to cities) and urban sprawl (spreading of the population and development into rural areas)

1.1.5 Technological Factors

- Breakthrough technologies or processes, technologies under development
- Rate of technological innovation
- Relative cost of technology, research and development
- Industry dependence on technological factors, impact of technological innovation
- Energy use

1.2 Sales Analysis

- Economic growth and profitability of industry vs. your growth and profitability
- Evolution of sales, market share, variable costs (labor, raw materials, energy, etc.)
- Evolution of marketing expenditures and profit margins of your company product(s) over last 5 years compared to industry figures

By product family or by product SKU (each model, version, format, etc.)

By sales territory or by any other unit pertinent to your company

- Summarize the elements above in table format (calculation formulas provided in parenthesis):

		Product A				
		Year -5	Year -4	Year-3	Year-2	Year -1
A	Industry Sales					
B	Company Sales					
C	Market Share					
D	Average Selling Price					
E	Variable Costs (per unit)					
F	Gross Margin per unit (D - E)					
G	Number of Units Sold (A x C)					
H	Gross Revenue (D x G)					
I	Total Gross Margin (F x G)					
J	Marketing Expenses					
K	Other Expenses					
L	Net Profits (I - J - K)					

TABLE 1. Product A Sales History

- Distribution trends and developments
- Types of distribution channels used in market and breakdown of sales generated through each channel
 - Breakdown for industry
 - Breakdown for your company
- Distribution costs through different channels

1.3 Competitive Analysis

1.3.1 Competitive landscape

- Indicate level of competition in industry (e.g. fierce, moderate) and number of competitors
- Indicate volatility of competition in industry: number of yearly new players and failures
- Describe type(s) of competition affecting your business (product/service competition, competition at the level of corporate/marketing strategy or business model, or competition based on specific attributes such as price, quality, features, etc.)
- Identify the industry's competitive barriers to overcome and state how your company has dealt or will deal with them
- Identify potential sources of competitive advantage

1.3.2 Key Players

- Identify main sources of competition (direct competitors, indirect competitors, substitutes, potential entrants, related products) and evaluate relative intensity of competition arising from each source
- Identify major competitors and lesser competitors and list them in categories based on source type (refer to above item) and/or based on their threat level
- Identify the factors that give power to competitors (e.g. marketing strategy, superior product, established company, strong financial backing, expertise, relationship with key industry members, etc.). Identify the strategies and/or market conditions that have allowed competitors to achieve good results and, if applicable, what has caused them to fail

1.3.3 Key Players vs. Your Company

- Select your main competitors and compare them to your company. Evaluate the performance of their marketing activities and identify the intensity and type of threat they pose, main strategies, recent initiatives and offensive tactics (directed towards your company). Briefly analyze the following elements and compare them to your company:

- Product/service offering (characteristics, features, benefits)
- Size (in terms of sales, market share, infrastructure and customer base)
- Objectives
- Strengths and weaknesses
- Brand equity: customer loyalty, brand image, brand awareness, brand recognition and brand reputation
- Past, present and future strategies
- Marketing strategies (positioning, branding, advertising, media expenditures)
- Probable actions in response to market changes and to your company
- Efficiencies in cost structure (e.g. economies of scale or scope, streamlined processes, JIT, etc.)
- Degree of vertical integration
- History of innovations
- Strength of management
- Strength of distribution
- Financial resources

- Summarize key competitor information in the following table:

Direct Competitors	Market Share	Product or Service Description	Product or Service Features	Strengths	Weaknesses	Marketing Strategy	Aggressiveness (High, Low, Medium)	Threat Level (High, Low, Medium)
Competitor 1								
Competitor 2								
...								
Indirect Competitors								
Competitor 3								
Competitor 4								
...								
Substitutes								
Competitor 5								
Competitor 6								
...								
Potential Entrants								
Competitor 7								
Competitor 8								
...								
Related products								
Competitor 9								
Competitor 10								
...								

TABLE 2. Main Competitors

1.3.4 Competitive Advantage

- Describe your competitive capabilities, resources and competitive advantage(s)
- Compare your core competencies in relation to that of competitors

1.3.5 Strategic Group Map

- Construct a strategic group map of competitors in your industry (see Figure 1 below):
 1. Identify the main characteristics that differentiate firms in the industry (e.g. price/quality, product assortment, number of segments served, geographic coverage, degree of vertical integration, number of distribution channels, customer service orientation, etc.).
 2. Draw a 2-axis map with 1 differentiating characteristic per axis.
 3. Plot the competitors on the map.
 4. Group competitors that fall in the same region by encircling them. The size of the circle should be proportionate to the group's total market share.

OR

Encircle individual competitors. The size of the circle should be proportionate to that company's relative market share.

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HIGH

Price/Quality

Low

Few

Market segments served

Many

FIGURE 1. Strategic Group Map

1.4 Customer Analysis

1.4.1 Segmentation Dimensions

- List the most pertinent segmentation dimensions for your market (e.g. demographics, behaviors, geographic regions, purchase habits, resistance to change, adopter categories [innovators, early adopters, early majority, late majority, laggards], familiarity with or access to technology, etc.)

1.4.2 Target Market

- Briefly identify your target market(s) (see [Section 3.2.1](#) for profile of target market)

1.4.3 Forecasted Changes

- Identify expected changes in target customer needs
- Identify expected changes in buying behavior
- Identify expected changes in customer perceptions and attitudes
- Identify how these changes might affect competitors' strategy
- Identify segments that might potentially become your target
- Provide forecasted changes in market segments:
 - Which segments are growing or declining and why
 - Growth rate
 - Relative segment sizes
 - Characteristics of segments

1.5 SWOT Analysis

- List in a table your company's key internal strengths and weaknesses, the threats it faces and the opportunities that the market presents. Elements discussed above (e.g. competitive advantage) should be present in this table (Table 3 below).

<p>STRENGTHS</p> <p>Examples:</p> <ul style="list-style-type: none"> - Elements which provide competitive advantage - Cost structure / efficient production process - Technical know how - Very good reputation - Superior product - Highly qualified workforce - Strong relationships with key industry members 	<p>WEAKNESSES</p> <p>Examples:</p> <ul style="list-style-type: none"> - Lack of innovation - Poor adaptability to market conditions - Lack of communication - Little financial resources - Poor management - Very long product development time - Poor brand awareness - Unreliable customer service
<p>OPPORTUNITIES</p> <p>Examples:</p> <ul style="list-style-type: none"> - Emerging markets - Growing demand - Changing customer tastes - New product uses - New regulations - New distribution channels 	<p>THREATS</p> <p>Examples:</p> <ul style="list-style-type: none"> - New competitor - Potential loss of financial backing by X - New regulations - Declining population - Market saturation

TABLE 3. SWOT

1.6 Analysis of Marketing Activities (if applicable)

1.6.1 Analysis of company's marketing programs

- Describe strategies employed by your company for each market segment
 - Targeting strategy
 - Positioning strategy
 - Branding strategy
 - Advertising strategy
 - Promotional strategy
 - Public relations strategy
 - Publicity strategy
- List marketing expenditures and media allocation
- Evaluate performance of present marketing activities
- Compare performance of advertising mediums employed
- Identify elements that need to be reconsidered based on elements covered above in Situation Analysis

1.6.2 Analysis of Resources and Metrics

- Describe skill and experience level of marketing executives and managers
- List the metrics employed to evaluate effectiveness of campaigns and evaluate their usefulness
- List financial resources available for marketing
- List human resources available for marketing

1.6.3 Brand Strength

- Describe your brand's identity and brand attributes
- Indicate status of brand image
- Indicate levels of
 - Customer loyalty
 - Customer satisfaction
 - Brand awareness
 - Brand recognition
 - Brand reputation

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2. OBJECTIVES

2.1 Corporate Objectives

- State corporate objectives
- State divisional objectives
- State business unit objectives

2.2 Marketing Objectives

2.2.1 Short-term (upcoming year)

- Establish specific and measurable goals that express desired levels of sales, market share, brand variables, ROI, etc., over a specific timeframe and geographic/sales market. For example:

- Improve customer loyalty (generate X% of repeat business in year 1)
- Increase brand awareness in X market segment from X% to Y% in year 1
- Extend reach of communications to 90% of target customers for each campaign
- Create brand awareness for new product to be launched in forth quarter
- Gain at least 30 new clients in X market segment per quarter
- Sell 100 products per week
- Achieve a high level of customer satisfaction among 95% of target customers
- Increase market share in X market segment by 5% this year
- Reduce marketing costs by 10% over next 6 months

2.2.2 Long-term (3 to 5 years)

- Establish specific and measurable long-term goals that express desired levels of sales, market share, brand variables, ROI, etc., over a general timeframe and geographic/sales market. For example:

- Become the number one brand in our market in year 5
- Build strong ad awareness for product X over next three years
- Acquire 20% of our competitors' customers by year 4
- Reduce cost per acquisition to X by year X
- Make our brand synonymous with X emotional/rational elements
- Increase profit margin of product line A by X% by year 3
- Secure partnership with all major distributors in X market

3. MARKETING STRATEGY

3.1 Market Segmentation Strategy

- Identify how you will segment the market. The main types of segmentation strategies are as follows (you may choose a combination of strategies):

- Geographic Segmentation: segmenting customers based on geographic area (city, country, ZIP code, metropolitan statistical areas, time-zone, etc.)
- Product-User Segmentation: segmenting customers based on product usage (amount and/or consumption patterns of a product category or brand)
- Lifestyle Segmentation: segmenting customers based on their lifestyle (which includes: values, beliefs, attitudes, perceptions, leisure activities, preference for social events, sports interest, media usage, political views, etc.)

- List the main market segments

3.2 Targeting Strategy

- Identify the targeting strategy adopted by your company. This will determine which market segments (established above in Section 3.1 Marketing Segmentation Strategy) you will focus on. The three main targeting strategies are:

- Mass Marketing: go after the market as a whole with one offer that answers common needs
- Differentiated Marketing: go after several market segments with offers tailored to each
- Target Marketing: go after a small segment or sub-segment with a tailored offer

3.2.1 Target Market

- Identify the selected target market(s)

- Provide the profile of your target market according to the following:

Demographics

Age
Gender
Social status
Occupation
Religion
Ethnicity
Income
Social class

Psychographics

Lifestyle
Attitudes and beliefs
Perceptions
Personality
Adopter category (innovators, early adopters, early majority, late majority, laggards)

Consumption and use patterns

Buying motives
When, where and how they buy
Usage rate
How often they buy
Types of important buying situations
Who makes the buying decision and who does the buying?

Marketing and Brand dimensions

Specific responses to marketing campaigns

Openness to marketing

Familiarity with brand

Do they select a product based on brand or product attributes?

Brand loyalty

Customer satisfaction

How they choose between competing brands

Nature of your relationship with customers

Face-to-face, telephone, Internet, mail

Closeness of the relationship

How often is their feedback requested?

How often do you communicate with them?

3.3 Product Life Cycle

- Identify the developmental stage of your product (i.e. the degree of acceptance your product has earned in the market) and identify the appropriate message to convey in your advertising. The three primary stages are:

- Pioneering stage
 - The advertising used in this stage introduces a new concept, changes habits and educates.
- Competitive stage
 - The advertising used in this stage establishes your product's superiority over competing products.
- Retentive stage
 - The advertising used in this stage simply reinforces or reminds customers of the qualities and acceptance your product is already recognized for.

3.4 Potential Strategies

3.4.1 Strategy Formulation

- List the major marketing strategies that are available to your company. Provide the underlining segmentation and targeting strategy and briefly describe the major elements of the marketing mix for each strategy (product, place, promotion, price) (marketing mix elements will be detailed in [Section 4.1 Marketing Mix](#)). Marketing strategies may be based on the following generic business strategies:

- Differentiation Strategy
 - Marketing strategy will involve differentiating your company from competitors by highlighting key variables such as price, quality, features, customer service, etc.
- Cost Leadership Strategy
 - Marketing strategy may involve cost-cutting initiatives across the distribution/production process and/or may involve offering a heavily discounted and standard product to all market segments
- Differentiation Focus Strategy or Niche Strategy

- o Niche marketing strategy will focus on a very distinct, usually small and overlooked market segment, and all marketing mix elements will be tailored specifically to this segment
- Cost Focus Strategy
 - o Marketing strategy will involve offering a basic low-cost product to a small market segment

3.4.2 Strategy Pros & Cons

Strategy #1: Define strategy

Pros:

-
-
...

Cons:

-
-
...

Strategy #2: Define strategy

Pros:

-
-
...

Cons:

-
-
...

Strategy #3: Define strategy

Pros:

-
-
...

Cons:

-
-
...

3.5 Core Strategy

- Identify and justify the selected marketing strategy(ies) that will be employed to achieve marketing goals
- Explain how marketing strategies are likely to change as the product/industry matures and in response to competitor actions
- Identify the types of marketing to be used as part of core strategy

e.g.:

Aggressive tactics
 Defensive marketing
 Maintain steady growth
 Guerilla marketing

Competitor imitation
 Competitor avoidance

Traditional marketing (print, radio, TV, outdoors, public relations)

Grassroots marketing: word of mouth, viral marketing, buzz marketing
Interactive marketing, digital marketing

Direct marketing, relationship marketing

Urban marketing

Lifestyle marketing, experiential marketing, events marketing
Youth-oriented marketing

Loyalty marketing

Entire market coverage or selected segments

Product rich/low in features
High/low/equal quality product
High/low/equal price
Unique packaging
Exclusive/wide distribution

3.5.1 Positioning Strategy

- Describe the company's unique selling proposition and how you differentiate yourself from your competitors
- Provide company's positioning strategy or positioning strategy per product or per product family. Provide slogan or positioning statement for company and per product. Positioning strategies can be based on the following:

Product attributes
Product benefits
Meeting a need that is not being satisfied by competitors
Customer usage occasions/patterns
Users
Direct comparison to competitor
Avoiding competitors
Product classes

- Indicate whether positioning will remain constant across different target segments, if not provide positioning per segment

3.5.2 Branding

- Provide branding strategies based on positioning
- Detail the brand names and elements
 - Corporate style guide
 - Company and product logo/slogan
 - Brand identity, personality and associations
 - Brand names (trademarks)
 - Packaging

4. MARKETING PROGRAMS

4.1 Marketing Mix

- State the major elements of your marketing mix (detailed below). Justify the timing and sequencing of all elements and explain how they interact to create synergy.

4.1.1 Product

- Identify main product line and sub-product lines
- Identify key product attributes (e.g. features, quality, wide or deep product assortment, packaging, trust/warranty, etc.) that will be or have been implemented in response to target market's needs and according to marketing strategy
- Provide the company's approach to each attribute

e.g.:

Attribute: features

Standard product low in features

Attribute: deep product assortment

Large selection of different products within same product line

Attribute: quality

Very high quality product

Attribute: trust/warranty

Strong warranty and return policy

- Provide product name, description, functionality, features and benefits
- Compare your product offering to that of your main competitors
- Identify how/when new products will be introduced or failing ones dropped
- Identify changes to production process

4.1.2 Pricing

- Describe how selling price will be determined
- Describe pricing strategy (e.g. market-skimming pricing, market penetration pricing, lowest price provider, geographic pricing, bundling of products, etc.) and how it relates to overall marketing strategy
- Compare price in relation to costs
- Provide discount schedules
- Provide instances of price adjustments (e.g. international pricing, levies and regulations, reaction to competitors' pricing, geographical prize zones, etc.)

4.1.3 Distribution (Place)

- Specify the role of distribution as it applies to the marketing strategy (e.g. exclusive distribution, penetrate the whole market, selective distribution)
- Identify geographical or sales territories to be covered
- Specify the type of distribution channel(s) (e.g. direct/indirect/personal selling, number and type of intermediaries [retailer, wholesaler, distributors, agents])
- Specify whether middlemen are:

- Gathering marketing research information
- Providing marketing (research) information down and up the supply chain
- Promoting your product
- Adding a price markup
- Negotiating with customers and/or other middlemen
- Transporting and storing goods

4.1.4 Advertising (Promotion)

4.1.4.1 Copy

- Provide ad themes selected according to marketing strategy: the appeal and messages to be conveyed which support marketing strategy (can be based on your unique selling proposition)
- Provide ad styles:

- Emotional
 - Triggering emotional responses through psychological appeals to humor, love, hate or fear
- Factual
 - Stating facts / scientific evidence / lab test results
- Imaginative
 - Use of symbolism, imagery, art and the like
- Comparative
 - Comparing your product directly with competitors

- Storyboard (if available)
- Person/agency in charge of execution

4.1.4.2 Media

- Explain choice of media in combination with ad type
 - Print
 - Radio
 - TV
 - Outdoors
 - Events
 - Public relations/publicity
 - Online
- Explain how each medium will be used in terms of timing, sequencing and synergy
- Provide desired advertising goals by media in terms of:
 - Reach
 - Exposure
 - Frequency
 - Continuity
 - Awareness
 - Specific response
 - etc.

- Summarize the information above about timing/sequencing in the table below:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Media												
Print	◆	◆ ⊕						⊕	◆			
Radio	□ ▽	□	□				□ ▽					
TV							▽ □	▽	▽	▽		
Outdoors				◆	◆	◆	◆					
Events			⊕ ◆						⊕ □			
Public relations/publicity	⊕	⊕			◆							
Online		◆								▽	▽	◆

TABLE 4. Media Plan

- ◆ Ad type A:
 - Description
 - Circulation **OR** number of impressions **OR** number of clicks **OR** number of installations **OR** air time + share of audience **OR** number of events
- Ad type B:
 - Description
 - Circulation **OR** number of impressions **OR** number of clicks **OR** number of installations **OR** air time + share of audience **OR** number of events
- ▽ Ad type C:
 - Description
 - Circulation **OR** number of impressions **OR** number of clicks **OR** number of installations **OR** air time + share of audience **OR** number of events
- ⊕ Ad type D:
 - Description
 - Circulation **OR** number of impressions **OR** number of clicks **OR** number of installations **OR** air time + share of audience **OR** number of events

4.2 Loyalty Programs

- Describe the type of loyalty program(s) offered

The main types of loyalty programs are:

- Rewards program: provide rewards for repeat purchases in the form of points or gift certificates, redeemable towards different products
- Appreciation program: reward loyal customers with additional products/services or various perks
- Partnership program: collaborating with another company to offer loyal customers a special deal on their product
- Rebate program: provide a discount or a free product once customers reach a certain amount of purchases
- Affinity program: capitalize on customers' interests by supporting a local cause, event or charitable organization with every purchase they make

4.3 Customer Service & Support

- Identify key elements of customer service and support that relate to marketing strategy
- Specify all elements of customer service
 - Customer service hours
 - Level and method of customer service/support provided (telephone, website, live chat, email)
 - Performance levels that will be maintained
 - Availability of technology services/applications (e.g. percentage of web server downtime)
 - Response time to customer inquiries
 - Time required to fix problems

4.4 Market Research

- Identify customer information needed to successfully implement marketing programs
- Describe how market research information will be obtained, stored and updated (as well as customer privacy safeguards)

4.5 Personal Selling

- Identify elements of personal selling (face-to-face) strategy if applicable
- Identify salesforce needs
 - Number of salespeople required
 - Type of salespeople required
 - Type of sales presentation to use

4.6 Trust and Credibility

- Identify how trust and credibility will be obtained
 - Ad copy
 - Testimonials
 - Guarantee
 - Seal of approval / expert recommendation
 - Trial offer / samples / demonstrations

4.7 Trade Promotions

- Describe elements of trade promotions with distributors and/or partners

5. IMPLEMENTATION PLAN

5.1 Product Design and Development

5.1.1 Technical Requirements

- Provide the list of changes or additions to product including packaging (as required by marketing strategy)
- Plan a schedule for the internal steps required to implement changes (brainstorming sessions, drafting proposals, cost and feasibility analysis, selection process, consensus among decisions makers, review of final decision, etc.)
- Detail changes required to production/manufacturing process
- Specify requirements needed to initiate these changes (e.g. patents)
- Include a plan for testing, incremental reviews and a final evaluation of product

5.1.1.1 Outsourcing Requirements

- Designate employee(s) in charge of establishing provider requirements, requesting proposals, comparing offers, selecting provider and negotiating
- Establish schedule for shopping for providers and comparing offers
- Establish schedule for sending request for proposals to service providers, vendors, suppliers or partners and deadline for choosing provider

5.1.2 Marketing Requirements

- Provide a detailed account of who will be responsible for writing up new product description and collateral material

5.1.3 Resource Requirements

- List main tools, equipment, facilities or other elements required to implement product changes
- Designate employee(s) in charge of defining specific item requirements and making purchases

5.2 Marketing & Sales

5.2.1 Pricing Requirements

- Detail new pricing structures
 - Costs
 - Wholesale price
 - Markup
 - Suggested retail price
- List all sales material that will have to be updated/created and designate tasks to responsible employees
- List all databases and digital records which need to be updated and designate tasks to responsible employees

5.2.2 Positioning, Branding & Corporate Literature

- Designate marketing director in charge of company's positioning and brand strategies
- Designate creative director in charge of corporate style guide and creative guidelines (for using brands, logos, slogans, company fonts, color scheme, etc.). Company-wide training sessions must be planned to communicate the positioning/branding strategies.

- The following creative briefs guides must be filled:

Brand: [NAME]		Date: [MONTH, YEAR]
CURRENT BRAND EQUITY		
Emotional Elements	Rational Elements	
DESIRED BRAND EQUITY		
Emotional Elements	Rational Elements	
ALL COMMUNICATIONS		
Should	Should not	

Brand or product: [NAME]		Date: [MONTH, YEAR]
KEY OBSERVATION		
[The most important market factor(s) that will shape your advertising strategy]		
CONSUMER INSIGHT	COMMUNICATION OBJECTIVE	
[The consumer's sensitive or pressure points that ad should trigger]	[The ad's main goal]	

PROMISE	
[What the brand stands for and how it is positioned in the minds' of consumers]	
AUDIENCE	SUPPORT
[Who is target audience? How do consumers feel about the brand?]	[What drives the brand's promise? What allows consumers to believe in promise?]

(May be done per ad campaign or for entire marketing strategy.)

- Assign responsibilities for registering trademarks
- Assign responsibilities for creating corporate documents and information kits that bear the company's logo, positioning and brand

5.2.3 Advertising

- Assign responsibilities for researching, planning, creating, reviewing, approving and testing advertisements and for placing media buys
- Detail elements that are to be done in-house and outsourced (e.g. ad design, printing, mailing, etc.)
- Designate employee(s) in charge of establishing provider requirements, requesting proposals, comparing offers, selecting provider and negotiating
- Establish schedule for shopping for providers and comparing offers
- Establish schedule for sending request for proposals to service providers and deadline for choosing provider

5.2.3.1 Market Test

(If your company has sufficient resources on hand, a market test is the best way to assess your advertising strategy. The ideal test market represents the demographics of your target market, is somewhat isolated, offers relatively inexpensive means to advertise, and does not show very strong brand loyalty.)

- Detail the parameters of a market test:
 - Market characteristics
 - Scale of test (specific products vs. whole product line, (un)restricted distribution channels, (un)limited media usage, etc.)
 - Timing
- Establish metrics for analyzing performance of test
- Establish performance levels that must be met in order to carry on with strategy as planned

5.2.4 Loyalty Program

- Specify the required elements of the selected loyalty program
- Designate employee(s)/department(s) in charge of defining and securing elements of loyalty program as identified in marketing strategy
 - Free product(s) / giveaways
 - Implementation of point/reward system
 - Gift Certificates
 - Partnership development
 - Find social cause or event to support
 - Implementation of customer sales-history tracking
 - Acquire technology
 - Integrate technology into company systems
- Designate employee(s) in charge of establishing provider requirements, requesting proposals, comparing offers, selecting provider and negotiating
- Establish schedule for shopping for providers and comparing their offer
- Establish schedule for researching and sending request for proposals to service providers and deadline for choosing provider

5.2.5 Trust and Credibility

- Assign person in charge of acquiring and implementing method of obtaining credibility
- Explain how trust and credibility will be obtained through the following (choose one or more relevant method)
 - Ad copy
 - Testimonials
 - Guarantee
 - Seal of approval / expert recommendation
 - Trial offer / samples / demonstrations
 - Other

5.2.6 Salesforce

- Organize teams and divisions based on the segmentation approach
 - Assign sales teams to geographic region
 - Assign sales teams to specific product lines
 - Assign sales teams to specific clients or to client types
 - Assign sales teams to specific functions
- Specify type and number of salespeople required per team or territory or division
- Specify sales material required and training required by each salesperson
- Designate employee(s) in charge of developing sales presentation
- Designate employee(s) in charge of hiring, training, motivating and scheduling
- Designate members in each team in charge of coordinating information among divisions

5.2.7 Customer Service

- Specify staff requirements
 - Number of employees
 - Type of employees (full-time/part-time)
 - Working hours
 - Responsibilities
 - Training
- Specify customer service policies
- Designate/hire employee(s) in charge of hiring, training, scheduling

5.2.8 Market Research

- Specify primary market research information that should be gathered from direct sources:
 - Personal selling
 - Customer correspondence (telephone, email, fax, mail)
 - Surveys
 - Sales reports
 - Other
- Specify secondary market information that should be collected to support present and future marketing strategies
- Designate employee(s) in charge of establishing information-gathering procedures
- Designate employee(s) in charge of acquiring/integrating information storing, retrieving and analysis systems (e.g. CRM software, intranet solutions, content management tools)

5.3 Distributors

- List types of distributors required by marketing strategy per territory
- Designate employee(s) in charge of establishing supplier requirements, requesting proposals, comparing offers, selecting provider and negotiating

5.3.1 Marketing Material

- Designate employee(s) in charge of planning, creating, reviewing and approving sales literature to be supplied to distributors

5.4 Resource Requirements

- List equipment, facilities, raw materials, finished goods and office supplies required to successfully implement marketing plan
- Designate employee(s) in charge of defining specific item requirements and making purchases

5.5 Scheduling

- Provide a table (see next page) which depicts the timeframe of key activities and who they are assigned to

ACTIVITY	START DATE	TARGET END DATE	ASSIGNED TO	COMMENTS
PRODUCT DESIGN AND DEVELOPMENT - main task 1 - main task 2 - main task 3 - main task 4 ...				
SALES & MARKETING - main task 1 - main task 2 - main task 3 - main task 4 ...				
DISTRIBUTORS - main task 1 - main task 2 - main task 3 - main task 4 ...				
RESOURCES TO ACQUIRE - resource 1 - resource 1 - resource 1 - resource 1 ...				

TABLE 5. Implementation Worksheet

6. PERFORMANCE EVALUATION AND MONITORING

6.1 Monitoring Ad Campaigns

6.1.1 Performance Metrics

- List metrics that will be used to measure the success of ad campaigns. Success can be measured against:

Marketing objectives
Specific campaign goals
Past results
Industry averages

Examples of metrics:

- Behavior based
 - Number of website visitors, length of stay, depth of navigation, number of clicks
 - Number of calls received
 - Number of complaints
 - Change in customer behavior/buying patterns
 - etc.
- Cost based
 - Conversion rate (proportion of customers who perform a specific action)
 - Cost per new client acquisition/cost per sale
 - ROI
 - etc.
- Based on brand variables
 - Customer satisfaction level
 - Customers' impression of brand/product (assessed through surveys and feedback)
 - Brand awareness/recognition levels (assessed through surveys and feedback)
 - Customer loyalty levels
 - etc.
- Hybrid (combination of above elements)

6.1.2 Advertising Costs

- Determine advertising cost-sales ratio per product line (total advertising cost for product line divided by sales in dollars generated by product line or sales person or territory x 100)

- Determine product advertising cost-total advertising cost ratio (product advertising cost divided by total advertising cost x 100)

- By filling Table 6 below, you should be able to:

1. Analyze overall advertising costs in relation to sales and profits
2. Compare performance of each product **OR** territory **OR** market segment **OR** department
3. Compare performance of each medium

	Total	Product A (OR Territory 1 OR Market X OR Department)	Prod B	Prod C	Prod D	Prod E
Net sales	150,000	30,000				
Advertising expenses			Fill in information for each product OR territory OR market segment OR department in order to draw comparisons between each category (columns) and between each advertising medium.			
Print	9,000	1500				
Radio	1,000	500				
TV	5,000	2000				
Outdoors	4,000	600				
Events	2,400	1,200				
PR	2,000	500				
Online	4,500	500				
Total expenses	\$27,900	\$6,800				
Advertising cost as a % of sales	19%	23%				
Net profit	\$37,000	\$10,500				
Advertising cost as a % of profit	75%	65%				
Number of new clients	2,000	150				
Advertising cost per acquisition (ad expenses divided by number of new clients)						
Print	\$4.5	\$10				
Radio	\$0.5	\$3.3				
TV	\$2.5	\$13.3				
Outdoors	\$2	\$4				
Events	\$1.2	\$8				
PR	\$1	\$3.3				
Online	\$2.25	\$3.3				
Average acquisition cost	\$14	\$45				

TABLE 6. Advertising Cost Analysis for [YEAR]

Unique Ad Identifiers

- In the table above, cost per acquisition per medium is calculated assuming that new clients were equally generated by each medium. However, in practice the number of customers generated by each medium is not necessarily the same. To obtain a more precise advertising cost per acquisition, implement a system for creating and tracking unique promotional codes, coupons or web pages customers can access or must reference while making a purchase. In addition, customers can be asked which ad they saw at the point of purchase (or through a form filled at the time of purchase).

6.2 Sales Analysis

6.2.1 Reporting Schedule

- Establish the schedule (frequency) for generating sales reports (to be communicated to marketing managers):

Daily/weekly
Monthly/quarterly
Yearly
Per campaign
Per competitors' actions (e.g., ad campaign, PR, new product launch, etc.)
etc.

6.2.2 Sales Breakdown

- Establish the required sales breakdown to be used in sales reports. Sales may be broken down by:

Sales territories
Sales rep
Product, packaging format, product version, product flavor, etc.
Customer type (new/old)
Customer type by demographic, by trade, by size
Method of sale: telephone, mail, web, face-to-face
Size of order
Employee commission class
etc.

6.2.3 Benchmarking

- Establish the most relevant benchmarks against which sales must be compared

Industry sales (which provides your market share)
Research data/publications
Sales goals/quotas
Past sales period figures
Forecasts (done in-house or by industry analysts)

6.2.4 Performance Index

- Identify performance levels or quotas to compare against actual sales per product **OR** territory **OR** market segment **OR** department

You may compare actual sales data to:

- Expectations based on population size (when there is not much variation between buying habits of populations in different territories)
 1. Break down territory populations as a percentage of total market population
 2. Multiply total yearly market sales by territory population percentage to obtain expected sales for that territory
 3. Divide actual sales for territory by expected sales for territory x 100 to obtain performance index for that territory

e.g.: Market = Territory A + Territory B + Territory C
 Population size = 10,000 potential customers
 Total actual yearly sales = \$150,000

	Population	Population percentage	Expected sales for territory	Actual Sales	Performance Index
Territory A	3,000	30%	\$45,000	\$30,000	67
Territory B	5,000	50%	\$75,000	\$90,000	120
Territory C	2,000	20%	\$30,000	\$30,000	100
Total	10,000	100%	\$150,000	\$150,000	

A performance index of 100 means that a territory has achieved sales equal to expected sales performance for that territory. An index above 100 means that it has surpassed expected sales and below 100 means it has performed below expected sales performance

- Expectations based on “normal” sales performance. Normal sales levels may be based on:

- Industry figures (averages, predictions and forecasts)

- One territory's sales versus another

e.g.:

- o Actual territory A sales divided by territory A expected sales x 100

vs.

- o Actual territory B sales divided by territory B expected sales x 100

- Same territory last year or last period

- One sales representative (comparing all reps to top performer)

- Number of sales calls required to make a sale

- Ad dollars spent per medium

Ad spending per medium divided by total sales x 100

- Sales expenses (includes salary and commission)

e.g.:

Salesperson expenses divided by sales produced by salesperson x 100 (cost-sales ratio)

Salesperson expenses divided by average salesperson expenses x 100

Salesperson expenses divided by company sales x 100

6.3 Profit and Loss Statements

- Establish the profits per product **OR** per territory **OR** per market segment **OR** per department. May be done on a quarterly or yearly basis.

Profit and Loss Statements for 1st Quarter ended [QUARTER END DATE], [YEAR]

	Total	Product A (OR Territory 1 OR Market X OR Department)	Product B	Product C	Product D
Net sales	10,000	5,000	3,000	1,000	1,000
less					
Cost of goods sold	4,850	2,000	1,600	650	600
<i>equals</i>					
Gross margin	5,150	3,000	1,400	350	400
less					
Operating expenses					
Advertising	2,400	1,000	800	300	300
Personal selling	700	300	180	120	100
Order processing & billing	450	200	120	80	50
Warehousing & distribution	350	150	100	50	50
Administration	260	100	60	50	50
Total expenses	3980	1,750	1080	600	550
<i>equals</i>					
Net profit	1170	1250	320	(250)	(150)
<i>divided by sales x 100</i>					
<i>equals</i>					
Net profit as % of sales	11.7%	25%	10.7%	-	-

6.4 Meeting Schedule

- Establish schedule for meeting to review and track progress of marketing activities
 - Establish time-based checkpoints for reassessing strategies, for considering adding new ones or for reassessing budgets

6.5 Customer Profiling

- Find out as much as possible about customers (but always inform them or ask for their permission when gathering/sharing personal information and always securely store and transmit such data)

List the type of information to be gathered

Track purchases, signups and communications by integrating ad tracking and/or Marketing CRM technology throughout the sales process

Information to store and analyze:

Demographics (including amount of disposable income or budget)

Where they are located

Where they buy

What they buy

Frequency of purchase

Response to ad campaigns

Free trial usage

Communication exchanges

etc.

- List types of customer feedback forms and market research methods to be used
 - Focus groups & questionnaires
 - Secret shoppers
 - Phone surveys
 - Web surveys
 - Feedback forms at point of purchase
- Set up specific events or behaviors to flag
- Establish actions to take in response to flagged events/behaviors

6.6 Salesforce Evaluation

6.6.1 Performance Variables

- Identify variables of interest for evaluating salesperson performance
 - Number of calls made
 - Number of visits
 - Number of sales presentations
 - Size of clients (use indexes e.g. 1,000+ employees = 100; 500-999 employees = 90; 200-499 employees = 80; etc.)
 - Average performance level of territory
 - Average sales of sales team member
 - Number of orders produced
 - Average order size, etc.
- Identify cost factors of personal selling
 - Annual compensation
 - Commission
 - Working expenses

6.6.2 Performance Ratios

- Identify averages and ratios of interest to measure performance of salesperson(s) (using the performance variables above). Aggregated salesforce, individual salesperson or product line figures that can be used to assess performance of sales territories, individual products or product lines, or salespeople.

e.g.:

- Order-call ratio per salesperson (number of orders per salesperson ÷ number of calls made per salesperson x 100)
- Average sales per salesperson (total salesperson sales in dollars ÷ number of sales of salesperson)
- Average number of sales per client size
- Number of sales for client size ratio (number sales to client ÷ client size index)

6.6.3 Cost Ratios

- Identify averages and ratios of interest to measure cost of salesperson(s) **OR** total territory costs **OR** product line costs (using the performance variables above).

e.g.:

- Salesperson costs-sales ratio (salesperson cost ÷ sales in dollars generated by sales person x 100)
- Territory costs-sales ratio (territory/store costs ÷ sales in dollars generated by territory/store x 100)

6.6.4 Compensation Plan

- Identify the method(s) to be employed to compensate the salesforce
 - Base salary
 - Commission
 - Hybrid

- Devise an employee motivation plan. Identify the methods used to motivate the salesforce.

Quotas

Bonus for surpassing quotas

Performance-based incentives programs

Profit sharing

Stock options

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7. FINANCIAL INFORMATION

7.1 Financial Capsule

- State expected sales for year 1 and for year 5
- State desired market share and when you should capture it
- State major assumptions
- List major marketing capital expenditures
- Provide estimated ROI for main marketing programs

Sales Forecast

	Last Year	Year 1	Year 2	Year 3	Year 4	Year 5
Sales						
Gross profit						
EBITDA						

7.2 Financial Assumptions

- State assumptions that allow you to make sales and cost forecasts. They may be related to the following:

- Expected success rate of marketing programs
- Market conditions
- Legislation and taxes
- Equipment performance/durability
- Ease of credit collection

7.3 Budget

7.3.1 Advertising

- Detail the funds that will be allocated to advertising for the next 2 years

	Y1 Q1	Y1 Q2	Y1 Q3	Y1 Q4	Year 1 Total	Y2 Q1	Y2 Q2	Y2 Q3	Y2 Q4	Year 2 Total	Total
Print											
Radio											
TV											
Outdoors											
Events											
PR											
Online											
Samples											
Other											
Total											

TABLE 7. Advertising Budget

- Provide a bar chart of media spending percentages for years 1 and 2

7.3.2 Marketing Programs

- List monthly **OR** quarterly **OR** annual budgets for each main business activity (usually given on a monthly basis for year 1, on a quarterly basis for year 2, and on a yearly basis for years 3, 4 and 5):

Product research & development
Distribution
Advertising
Loyalty programs
Personal selling
Customer service & support
Trust and credibility
Market research
Trade promotions

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7.4 Sales Projections (5 years)

Sales Projections - 5 Year Forecast													
YEAR 1													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	TOTAL
Category 1 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 1 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 2 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 2 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 3 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 3 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
YEAR 2													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	TOTAL
Category 1 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 1 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 2 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 2 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 3 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 3 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
YEAR 3													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	TOTAL

Category 1 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 1 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 2 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 2 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 3 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 3 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

YEAR 4													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	TOTAL
Category 1 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 1 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 2 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 2 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 3 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 3 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

YEAR 5													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	TOTAL
Category 1 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 1 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Category 2 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 2 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Category 3 Units Sold	0	0	0	0	0	0	0	0	0	0	0	0	0
Sale Price per Unit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 3 Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

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8. CONTINGENCY PLANS

8.1 Symptoms of Failure

- Specify the symptoms of failure to watch out for
- Specify the criteria that will allow you to determine if your strategy has succeeded or failed

8.2 Alternative Strategies

- Specify alternative strategies that your company may pursue if the one adopted fails or does not yield desired results

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APPENDICES

- Include documents which you believe could be of interest to the intended reader. For example:
 - Product literature and brochures
 - Market research data
 - Surveys
 - Past advertising campaigns
 - Photographs of your products/facilities
 - Media coverage
- Include financial documents if required. For example:
 - Break-even analysis
 - Cash Flow statement
 - Balance sheet
 - Business ratios (e.g. liquidity, solvency and profitability ratios)

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