

Strategic Marketing Plan Template

Vision/Mission, Values

- Where do we want to be in five years? What does that look like?
 - Financial goals
 - Service goals
 - Client goals
 - Work culture goals
- What values are important to us in our business and our lives?

Market Definitions

- Geography
- Markets
- Client types
- Project types
- Services/products provided
- Key staff

Market Trends

- Where is the market going geographically?
- How are the funding sources changing?
- How are the product types changing?
- How are delivery methods changing?
- What challenges are clients facing?
- Who are the key competitors?
- What is the competition doing successfully?

Self Analysis

- How do we define a "quality" client?
- Who are our key "quality" clients?
- Why do they select us?
- Why do clients not select us?
- What sets us apart from the competition?
- What are the opportunities for growth in this market?

- What are the threats?
- What do we need to overcome to increase success and market share?

Prioritize Client Types and Project Types

 Which client types and project types best align with our goals/skills and market trends?

Strategies and Actions

- How will we continue to best serve our key clients?
- How do we continue to better understand our clients' business?
- What key clients are we going to pursue? (in order of priority)
- What are our PR goals and strategies?
 - Marketing collateral (logo, brochures, websites, etc.)
 - Client relationship/ feedback programs
 - Professional organization involvement
 - Conferences/Trade shows
 - Articles
 - Speaking engagements
 - Client education
 - Direct mail
 - Newsletters
 - Advertising
 - Social media
 - Awards

Strategies and Actions

 What actions do we have to take to move forward?

Budget

• What will each action cost?