

Sales & Marketing Plan Template



GOAL: Goals should be specific, measurable objectives within a set time frame.



TARGET: A target should be a specific, reachable group sharing similar needs, habits, interests, motivations, demographics, or location.



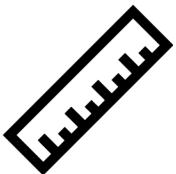
STRATEGIES: Your strategies should engage your target audience with compelling offers that align with their interests or needs.



TACTICS & BRAND MESSAGING: Tactics are the tools and channels you will use to reach your target audience. Brand messaging is the persuasive language used to explain your position in the marketplace and your unique selling proposition (USP).



CALENDAR: This section outlines the activities you will complete on a daily, weekly, monthly, or quarterly basis to achieve your goals. When is the most effective time or day of the week for each activity?



MEASUREMENT: How will you track your results and assess the effectiveness of each tactic? How will you measure the time, money, number of contacts, and level of engagement required to attract or retain each customer?

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Writing a marketing and sales plan is not as complicated as you think; knowing your target audience and where to reach them makes it easier to create one. Are you having trouble figuring out that part of your business plan? I have a blog post to help you find your target audience. [Your Customers Are Out There—Here's How to Find Them](#)

Here are my top three tips when creating a marketing plan.

- Don't create a 12-month marketing plan. Instead, make a quarterly plan; this comes in handy when measuring the success of each strategy. It will save you money; because you are not spending cash for 12 months on something that may not be working out as well as you had hoped.
- Measure the success of each strategy, tactic, and brand messaging monthly. Make changes to the plan by removing items or adding a new idea. Some ideas will require more time; keep this in mind when deciding to do away with one; it should make sense in the long term. Not all great ideas produce results instantly.
- Never implement more than three strategies at a time. It is hard to keep track of your data and what is working.

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EXAMPLE #1 Product-based business selling online only

Goal: Increase online sales through other online channels and reach a bigger audience. Increase sales from \$25,000 in 2022 to \$75,000.

Target: We are targeting customers shopping on online marketplaces for products. Online marketplaces bring in hundreds of millions of shoppers monthly. Customers who shop weekly on well-known online marketplaces; prefer to purchase from multiple stores or sellers at once and pay for their items in one transaction.

Strategy: Apply to sell on Walmart.com, Amazon, Target.com, Wayfair, and Urban Outfitters. Create an Etsy shop. These are some of the largest marketplaces where customers can purchase from more than one business in one transaction.

Tactics/Brand Messaging:

Tactics: Once approved, we will run ads on each marketplace to boost the views of our listings. We will set up an abandoned cart and favorite discount codes on Etsy to encourage customers to complete their purchases. Our ad budget is \$50 per day (per platform) and a 15% off promo code.

Brand Messaging: On social media, we will announce that we've made it easy to shop for our products; by sharing photos and links. Then list the marketplaces you can purchase from as well as our website. Ask followers to like, tag, and share when they find our products on those marketplaces.

Calendar: We will run ads daily for 90 days on the online marketplaces and post Monday through Friday at 1 p.m. on Instagram, TikTok, and Facebook to tell our followers where to find the products and daily promotional codes for each marketplace.

Measurement: We will measure the results based on the number of clicks on each listing from the ads (define the interest in the product), the number of coupon discounts used, and the number of sales in the 90 days on each platform.

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EXAMPLE #2 – Creative Design service-based business.

Goal: Acquire four new clients each quarter

Target: Authors and Business/Health & Wellness coaches who are guest or panelist speakers promoting their in-person workshops and online courses using industry, conferences, YouTube, social media, blogs, and podcasts.

Strategy: Direct Sales – approaching the targets directly: I will find a list of speakers from past business conferences for the Coaching, Wellness, Marketing, and Creative industries. This target audience will need someone to help brand/rebrand their business as their influence grows.

Tactics/Brand Messaging:

Tactics: I will send emails (not through an email automation platform like Mailchimp or MailerLite, but from my business email address.), send hand-written letters (asking permission to contact them and schedule a meeting), and advertise online branding webinars via Eventbrite and Google Events.

Brand Messaging: Is it time to rebrand your business? Learn how to use tools such as books, resource guides, and digital products to increase influence, brand awareness and revenue.

Calendar: Email 10 leads introducing myself and informing them of my upcoming webinars. Mail handwritten invitations to those who responded to the emails encouraging the business owners to schedule a discovery call with me. Send out these emails and letters daily. Monday through Friday. I will follow up once a month with my new contacts.

Measurement: I will measure the number of responses from the letters and emails, confirmed meetings, signups for the webinars via Eventbrite, and signed service contracts for the next 90 days.

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EXAMPLE #3 – Retail store with an online website

Goal: Increase repeat sales and referral business

Target: Satisfied customers who left a 4-star review or higher and customers who purchased at least four times a year from our store

Strategy: Create a rewards program and word-of-mouth sales campaign

Tactics/Brand Messaging:

Tactics: We'll reach out to the customers who left a 4-star or higher review and shop with us more than four times a year via email campaigns.

Brand Messaging: Tell them how much we appreciate having them as a customer and how word-of-mouth can help us grow the business to bring better products/services to the store. We will encourage them to tell a friend, gift-giving, and sign up for the rewards program.

Calendar: Have customers fill out a survey (in-store or online) with each purchase. Create weekly discounts for the rewards program.

Measurement: We will use a survey online and in-store to track referrals, the number of people signing up for the rewards program, how many customers are using the reward program, and how often.