

Marketing Plan Workbook

YEAR _____



Situation Analysis

Company Analysis

Goals

Focus

Culture

Strengths

Weaknesses

Market Share



Customer Analysis

Type 1 _____

Value Drivers _____

Decision Process _____

Type 2 _____

Value Drivers _____

Decision Process _____

Type 3 _____

Value Drivers _____

Decision Process _____

Type 4 _____

Value Drivers _____

Decision Process _____

Additional Notes



Competitive Analysis

Market Position _____

Strengths _____

Weaknesses _____

Market Share _____

List 3-5 competitors and their strengths and weaknesses.
Their biggest weakness is your biggest strength.

Competitor 1 _____

Strength _____

Weakness _____

Competitor 2 _____

Strength _____

Weakness _____

Competitor 3 _____

Strength _____

Weakness _____

Competitor 4 _____

Strength _____

Weakness _____

Competitor 5 _____

Strength _____

Weakness _____



PEST Analysis

List any external factors that affect your industry or business.

Political Environment _____

Economic Environment _____

Social and Cultural Environment _____

Technological Environment _____

SWOT Analysis

- The company's internal attributes can be classed as *strengths* and *weaknesses*.
- The external environment presents *opportunities* and *threats*.

Strengths _____

Weaknesses _____

Opportunities _____

Threats _____



Marketing Plan Workbook Instructions and Examples

Executive Summary – Brief description of product or services to be marketed and associated goals, such as sales figures and strategic goals. Example: Joe’s Pizzeria is an Italian restaurant located in Coral Springs, Florida. We have been family-owned for 30 years and have become a local favorite amongst Coral Springs residents. In recent years, we have put a bigger emphasis on our catering, which now accounts for 15% of our annual revenues

Challenge - Describe challenges, internal or external, that you have faced in the past 1-3 years.

Example: The biggest challenge we have faced in recent years is to maintain our high level of quality during a slumping economy. We have noticed more diners are budget-conscious, so we have adapted to the decline in revenues, but don’t want to compromise our quality.

Situation Analysis

Example:

Goals – Our goal is to increase revenues 10% to \$xxx in annual revenue. In addition, we want to cut our operating costs by 5%.

Focus – We are focusing on catering for social functions and businesses. We have also put more resources into our take-out service to adjust for decline in in-house dining.

Culture – The culture of Joe’s Pizzeria is a casual, fun atmosphere reminiscent of an Italian family-style restaurant. We offer delicious home-style Italian cooking in a fun environment and treat everyone like family.

Strengths – Our biggest strength is our award-winning food and our longevity in this area. We have never skimped on quality and guests can get a 5 star meal at a 3 star price.

Weaknesses – We are not a fine-dining restaurant and our weakness is to get new guests to try us for the first time. We also compete against low cost, franchise pizza restaurants with bigger market awareness.

Market share – We hold a 25% market share among Coral Springs Italian restaurants and a 10% share among local pizza restaurants.



Instructions and Examples Cont.

Customer Analysis

Example:

Type – Family Diners

Value drivers – Good quality dine-in or take out meal, at a value price

Decision process – Quality of meal.

Competitive Analysis

Example:

Market position – Top dine-in Italian restaurant

Strengths – Fantastic quality and longevity in our market.

Weaknesses – Brand identity and low price against national chains.

Market shares – 25% of market share for Italian restaurants.

Pizza Hut – Strengths - Brand awareness and low price with national franchise efforts. Weaknesses – Lacks quality of homemade pizza and sauce.

PEST Analysis

Example:

Political Environment – This is an election year and many people will be dining out during the election.

Economic Environment – The economy is on an upswing and more people are going out to eat.

Social and Cultural Environment – Coral Springs has a large population of young families who like the casual, family atmosphere.

Technological Environment – Many people are busy and appreciate the order and pick up options in our new phone app.

SWOT Analysis

Strengths – The quality of our food has been superior for many years because of our homemade food from family recipes. We have also won many awards as the best pizza restaurant.

Weaknesses – Our dining area is small and we have not perfected our catering opportunities.

Opportunities – Our restaurant has a great opportunity to do more catering functions.

Threats – A new Greek restaurant has opened up across the street and it is very popular.



Action Step for Customer 1

List specific marketing efforts to reach each type of customer.

Customer Type: Corporate Catering

Marketing Effort	Time Frame	Action Steps	Cost
Introduce to business park	3/31/17	Create flyers and do sales calls to businesses with samples	\$700
Join Chamber of Commerce	6/30/17	Join chamber and attend networking functions	\$1000
Advertise catering	9/30/17	Place ad in local business director	\$2,500



**For more information or assistance with
your Marketing Plan, give us a call!**

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