Marketing Plan Template

Fern Street Nursery is testing a local small-space gardening offer without stretching its shop team. Follow the initial choice, then see how hypothetical new customer evidence changes the offer, message, programme and measures before further promotion.

Fictional teaching example. All observations, amounts and targets are invented to show the method. Activities are planned; no customer or sales result is claimed.

Direction and goals

Fern Street Nursery. Plan for container plants and care support, 4 November to 18 December 2026. Maya owns the plan; Ellis coordinates shop activities.

The working choice

Shop questions suggest that nearby balcony and patio gardeners need help choosing suitable plants; the evidence is weak. Make the nursery easier to choose for them. Begin with a clearly priced starter set, individual items where a set is unsuitable, and practical care support. Use the existing website for information and stock enquiries, with buying and collection at the shop. A small clinic makes the advice tangible.

Defer bulk landscaping, a full delivery launch and broad discounting: these require different stock, economics or fulfilment and do not necessarily resolve uncertainty about suitability. A broader catalogue would not necessarily solve that uncertainty. Keep general shop customers welcome. There is no reliable segment or repeat-purchase baseline. Maya first checks recent buying experiences, stock and contribution; if people prefer advice and individual choice, change the offer before promotion.

Goals for this period

Desired change	Starting point and evidence	Target and review
Suitable starter-set purchases.	No tagged baseline. Begin a till tag when the offer is ready.	Working target: 24 sets from 16 Nov to 18 Dec. A chosen target, not a forecast. Ellis checks weekly.
Useful care support.	No consistent log. Begin a record of voluntary care questions.	Review 10 care conversations by 18 Dec. Maya identifies recurring issues and useful changes. Repeat-sales uplift remains unknown.

Customer evidence and alternatives

Ask about a recent purchase before presenting your offer. What was the person trying to do? What did they consider and choose? What nearly stopped them? What did they already have? What help did they need afterwards? Record what happened separately from your interpretation, then note what would change your decision.

Observation and source	What it may mean	Unknown and next check
Illustrative shop notes, 1–3 Nov: several customers asked which plants would suit a sunny balcony.	Suitability advice could be more valuable than simply showing more plants.	This small convenience sample does not establish demand. Maya asks six recent or potential customers about their last plant purchase by 10 Nov.
Illustrative till review, 3 Nov: plant sales are recorded, but starter sets and returning customers are not identifiable.	Total sales alone cannot evaluate this plan.	Ellis agrees a simple till tag and a voluntary care-question log before promotion.
Illustrative stock check, 4 Nov: the proposed plants are available now; later replenishment is not confirmed.	The offer must fit stock and supplier lead times.	Maya confirms quantities and substitutions before promising availability. No summer demand or supplier guarantee is inferred.

Buying situation and criteria

The gardener usually chooses and pays, sometimes with a household member. They may have limited room, uncertain light conditions or a past plant failure. Useful advice, visible plant condition, manageable care and a clear total price may matter. Interviews should test these assumptions, including with people who left without buying.

What customers could choose instead

Customer alternative	Why it may be chosen	Our response or next check
Large hardware or garden retailer	Convenient location, a broad range or a lower displayed price.	Do not claim to be cheaper. Show what the set includes and offer relevant advice; check the actual alternatives customers mention.
Buy separate plants online	Convenient browsing and delivery; suitability may still be uncertain.	Show real set contents and care information online. Keep delivery outside this plan until fulfilment is ready.
Use existing plants or postpone	Avoids cost or another failed purchase.	Let customers bring a photo and discuss light and care first. A sensible recommendation may be to buy nothing yet.

Offer and position

A useful focus combines a problem worth solving, people you can reach, an offer you can deliver and economics you can check. Compare it with the next-best use of the same money and time. Where a critical assumption is unknown, choose a small check and say what evidence would change the choice.

Priority customers and position

Prioritise nearby balcony and patio gardeners who want practical help choosing and caring for container plants. Position the nursery as a local place to make a suitable choice with advice after purchase. Support that promise with labelled options, staff guidance, clear care instructions and honest limits. Customer interviews may change the segment or offer.

Offering and customer value

Proposed sunny balcony set: one rosemary plant, a matching pot and saucer, potting mix and a care sheet. Staff check light, space and care time before recommending. Confirm suitability and item costs first; offer individual items when the set is not useful.

Price and terms

Test a displayed AUD 65 starter set including GST. Maya checks item costs, contribution and the value of included advice before finalising. This illustrative price is not validated willingness to pay. No blanket discount or credit offer.

Buying and delivery routes

Buy and collect at the shop. The website explains suitability, contents, price and how to ask about stock; it is not a new online checkout. Staff confirm stock before reserving a set. No delivery promise in this period.

Brand message and support

Message: choose plants that fit your small space, with help caring for them. Show actual set contents, readable plant labels and a short staff demonstration. Avoid promises that every plant will thrive or that sets save money without a real comparison.

Message and customer experience

Check the message against the plan: who it is for, what the customer receives, why the promise is credible and what they should do next. If the route, stock or service cannot support the message, change the promise before promoting it.

Customer relationships and repeat business

Give every buyer the care sheet and explain how to ask a question. Offer optional care reminders only with permission. Log recurring issues and improve advice. Invite satisfied customers to tell a friend; do not assume a purchase means email consent or require a referral.

People and service process

Ellis briefs two shop colleagues and checks labels daily. Maya confirms suppliers and handles uncertain suitability questions. Cap each clinic at six people so normal shop advice remains available. Pause invitations if stock or shop cover cannot support them.

Draft customer message

Plants for your balcony, chosen with you

Unsure what will suit your space? Bring a photo and tell us about the light and the time you have for care. Our sunny-balcony starter set includes a rosemary plant, matching pot and saucer, potting mix and a care sheet for AUD 65 including GST. Individual items are also available. Ask us about suitability and current stock before reserving. If the set is not right for you, we will explain other options.

Illustrative draft, not a live advertisement. Confirm contents, costs, suitability and stock before use.

Why these activities work together

The website helps a person check contents and suitability before a visit; clear shop information helps them choose; the clinic makes advice tangible; optional care follow-up supports successful use and future contact. A local listing and limited promotion point to the same offer. Broad paid reach is deferred until that offer is clearer. Delivery advertising would promise a route the shop has not prepared. These choices are a test of fit, not a claim that local channels always outperform digital advertising.

Marketing programme

Give each activity a useful customer response. Connect the work to the chosen offer, the dependencies and the people who can deliver it.

Planned external spending is AUD excluding GST. Team hours are separate. No actual spending, attendance or sales result is claimed.

Action and customer response	Owner and timing	Cash and team effort	Measure and dependency
Check needs and prepare the offer. Ask about the last plant purchase, compare alternatives and assemble a suitable small range.	Maya 5–13 Nov	AUD 120 8 hours	Six conversations and a recorded offer decision, not six confirmations. Confirm stock and costs first.
Make the choice clear in the shop and online. Show contents, suitability, total price and how to enquire about stock.	Ellis 10–20 Nov	AUD 280 10 hours	Check that a visitor can explain the offer and next step. Publish only after the customer and offer check resolves unsuitable options.
Invite local gardeners to a small potting clinic through shop notices, one local listing and a limited local promotion.	Ellis 21 Nov–12 Dec	AUD 300 12 hours	Track enquiries, attendance and tagged set sales separately. Confirm stock and six-person session capacity before inviting.
Provide care support and learn from buyers. Offer voluntary reminders and record useful questions and known return visits.	Maya 16 Nov–18 Dec	AUD 0 6 hours	Review at least 10 voluntary care conversations. Keep permission and customer issues clear; do not count reminders as sales.

First decision before committing

Maya confirms the customer findings, set contents, contribution and stock before Ellis finishes the materials and invites people. If the set is not useful, change the offer first.

Resources and trade-offs

A spending limit shows what is available, not whether the programme is worth doing. Check contribution after product and direct service costs before treating more sales as a better result. Keep stock purchases, wages and cash timing in the wider business budget; this companion tracks external marketing spending and team hours, not return on investment.

Spending and financial basis

4 Nov–18 Dec 2026. AUD excluding GST for external marketing costs: M1 120, M2 280, M3 300, M4 0. Planned total 700 against a 900 cash-spend limit, leaving 200 unallocated. Staff wages and stock purchases are outside this marketing-spend register and must still be covered in the business budget.

People and available time

Maya and Ellis can commit 40 combined hours over the period with normal shop cover. The four actions use 36 hours; keep four hours unallocated for changes and customer questions. Do not add the delivery launch or another clinic without changing cover, scope or timing.

Materials and approvals

Maya approves the set contents and price after the cost and stock check. Ellis needs current photos, accurate labels, a booking limit and a clear way to record voluntary reminder permission. The website must match what the shop can supply.

What could change the plan

What could change the plan	Response and owner
Customers value individual advice but not the proposed set.	Maya changes the assortment or sells items individually. Do not spend the remaining promotional budget just to defend the original idea.
Plant availability, suitability or shop cover is inadequate.	Ellis narrows the promoted range or postpones a clinic. Maya approves any extra spending or staff time before commitments increase.

The resource decision

The programme proposes AUD 700 of external spending and 36 team hours within the declared AUD 900 and 40-hour limits. The remainder is unallocated, not an automatic extension. Maya checks the costs, stock and shop cover before further commitments; review on 20 Nov.

Review and next choices

Define the measure, source, timing and decision it will inform. Leave unobserved actuals unknown; a sales change alone does not establish marketing causality.

Measure and definition	Source and timing	Actual and decision
Tagged starter sets sold. Working target 24 from 16 Nov–18 Dec; not total nursery sales.	Till tag checked weekly by Ellis. No comparable tagged baseline exists.	Not yet measured. Review on 20 Nov and 18 Dec. Compare progress with stock, customer feedback and staff effort; sales alone do not establish marketing causality.
Useful care conversations. Review at least 10 voluntary conversations by 18 Dec; log questions and changes needed.	Short shop log, reviewed by Maya weekly. Note known returning buyers separately.	Not yet measured. Improve advice if the same care problem repeats. Do not convert unknown repeat-purchase behaviour into an uplift claim.
External marketing spending and team hours for the agreed period.	Invoices or receipts and a simple time record. Review before each further commitment.	Not yet measured. Compare with 700 planned spend and 36 planned hours, and the 900 and 40 limits. Change the plan before using unallocated resources.

Next review and possible change

Maya and Ellis review on 20 Nov before clinic promotion. If interviews do not support the starter set, revise the offer and message first. If stock or cover is inadequate, narrow the range or postpone invitations. Review the full period on 18 Dec before committing to further promotion.

What we learned and will do next

To complete after the review. Record what customers actually said, what sold, the support required and the resource use. A channel with few directly tracked sales may still support discovery or trust; investigate before assigning all credit or stopping it.

Revise the offer before further promotion

Hypothetical 20 November review within this fictional case. The observations and decisions below are invented to demonstrate revision; they are not reported business results.

The new evidence

Suppose six short conversations about recent plant purchases produce four people who already have pots and want help choosing individual plants, and two gift buyers who prefer a complete set. This is a small convenience sample, not a population estimate. It weakens the assumption that a fixed set should lead all promotion, while preserving a possible gift-buying use.

Keep the focus and change the lead offer

Keep the local small-space focus and practical care support. What changes is the assumption that a fixed set should lead the offer. Lead with individually priced plants and suitability advice, retain the complete set as an option, and narrow the materials and clinic. This changes what the business will do, not only what the review says. Delivery stays outside the plan; the interviews do not prove demand. Maya makes this illustrative revision before further promotion.

How the planned work and resources change

External spending is AUD excluding GST. Team hours remain separate. These are original and revised plans, not actual results.

Action and change	Original plan	Revised plan
Customer and offer check Retain the completed research/decision allowance; do not count planned amounts as actual spending.	AUD 120 8 hours	AUD 120 8 hours
Shop and website information Replace the bundle-led display with individually labelled options and a short suitability guide. Narrow the production scope.	AUD 280 10 hours	AUD 220 8 hours
Local advice clinic Promote one small advice session rather than the bundle-led potting demonstration. Cap attendance at six; confirm shop cover and stock.	AUD 300 12 hours	AUD 180 8 hours
Care support Keep voluntary care follow-up and the question log.	AUD 0 6 hours	AUD 0 6 hours
Whole programme	AUD 700 36 hours	AUD 520 30 hours

Revised external spending is AUD 520 excluding GST: 120 + 220 + 180 + 0. Team effort is 30 hours: 8 + 8 + 8 + 6. Against the unchanged AUD 900 and 40-hour limits, 380 and 10 hours remain unallocated. The reductions of 180 and 6 hours are changes to the plan, not realised savings or profit.

The revised message and next check

The revised customer message

Bring your balcony questions

Already have a pot? Bring a photo of your space and tell us about the light. We can help you choose individually priced plants and explain their care. Ask about current stock and the next small advice session. Prefer a complete gift set? Ask us about the starter-set option.

Use the new measure on its own terms

Replace the 24-set working target with a new chosen target of 12 advice-assisted plant purchases from 21 November to 18 December. Tag these purchases separately and record whether the buyer chose individual items or a set. The counts have different definitions and must not be presented as a comparable sales trend. Keep the ten-care-conversation learning goal. Results, actual spending and actual hours remain unknown.

Next action and review

Ellis updates the materials and tracking before the next invitation. Maya checks the revised offer, contribution, stock and cover before release, then reviews customer questions and resource use on 4 December and the whole period on 18 December. If advice takes too much staff time, change the session scope or timing before adding promotion.

Try the revision in Excel

Try the revision in a separate copy of Nursery example. Keep row 18 at 120 and 8. Change C19/F19 to 220/8 and C20/F20 to 180/8; row 21 stays 0/6. Rename the changed activities. Totals become 520 and 30. Leave actuals and their date blank until known. The supplied workbook retains the original plan.

For a B2B service, the user, sponsor and buyer may be different people. Adapt the segment and buying criteria, clarify the promised work and route to a conversation, and plan service capacity and ongoing contact. The same choices apply without a plant set, shop or clinic.

Method and further guidance

Develop your marketing plan

The 5 Ps of marketing

Market research and competitive analysis

Navigate Marketing Plan Template and working files

Established marketing practices. Original Navigate explanations, layout and fictional illustration.