Marketing Plan Template

Choose your customers and offer, resource the work and decide what to change.

Use the answer spaces for your business. Word expands; the separate example and Excel companion are optional.

Direction and goals

Business and period

Name the business or client, offer or market, planning period and person responsible.

What needs to change

Describe the business outcome and starting situation. Include a baseline and source if known. Leave unknowns visible.

Our marketing direction

Connect the chosen customer need to the offer, position, buying route and ongoing relationship. Explain the choice in a few sentences.

What we will not prioritise

Name a plausible alternative and why it is not the focus now.

Why this focus is worth testing

Explain why this customer need and approach fit better than the main alternatives. Name the evidence, the trade-off and what could overturn the choice.

Goals for this period

Desired change	Starting point and evidence	Target and review

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

Buying situation and criteria

Who uses, chooses and pays? What triggers a purchase, matters in the choice and can prevent it? Consider existing, new and lost customers.

What customers could choose instead

Customer alternative	Why it may be chosen	Our response or next check

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

Choose a useful segment using need, reachability, fit and ability to serve. State the benefit, meaningful difference and credible support. Do not invent a persona biography.

Offering and customer value

What will customers receive, and which need does it address? Include important service or quality terms.

Price and terms

State the price or pricing approach, what is included and why it fits customer value, alternatives and costs. Treat a discount as a choice, not a default.

Buying and delivery routes

Where and how do people buy and receive the offer? Distinguish the buying route from the medium that promotes it.

Brand message and support

What should people understand and trust? Use relevant evidence or demonstration, not unsupported superiority claims.

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

How will people receive good service, continue getting value and return or recommend you? Use communication permissions appropriate to the channel.

People and service process

Who must support the promise? Check skills, stock, response time and fulfilment capacity before increasing demand.

Draft customer message

Write a short piece a customer could actually read. Make its promise, evidence and next action match the plan.

Why these activities work together

Give each selected channel or activity a job in the buying journey. Compare at least one plausible alternative, including its cost, reach, customer fit and operational needs.

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.

State the period, currency and tax basis for external costs. Use a short owner name or role and a date. Keep team hours separate.

Action and customer response	Owner and timing	Cash and team effort	Measure and dependency

First decision before committing

What must be confirmed first, by whom and when?

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

State the period, currency, tax basis, planned external spending and spending limit. Separate team time and link the business budget if needed.

People and available time

Compare the plan with time people can actually commit while meeting other obligations. Name a real trade-off or dependency.

Materials and approvals

Name the stock, suppliers, information, permissions or commercial decisions required before the actions can work.

What could change the plan

What could change the plan	Response and owner

The resource decision

Who agrees the money, time and trade-offs? What changes if the programme does not fit?

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

Next review and possible change

Set a review date and owner. What evidence would lead you to keep, change or stop the approach? Give the next action an owner.

What we learned and will do next

After the review, record the actual result, what it means and the next choice. Keep plans, estimates and observed outcomes distinct.

Revise the plan

Keep the earlier edition so the decision is visible. Connect new evidence to the assumption it changes, then update the affected offer, customer message, actions, resources and measures. A different plan is not a realised saving or a business result.

Revision after new information

Record the new evidence and its limits. What will you keep, change or stop? Update the actual offer, message, actions, budget, capacity and measures affected. Name the decision owner and next review. Retain the previous version.

What changes	Earlier plan	Revised plan

Decision owner and next check

Name the owner, next action and review date. Update the plan and companion themselves; retain the earlier edition.

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.