

## 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?