

## Strategic Marketing Plan Worksheet

Answer the questions in each section of this worksheet. The completed form can be used to write your marketing plan. Example responses are provided in red text.

### Pre-Planning

**Form a team**--Who needs to be involved? (e.g., staff, board members, volunteers)

Name and Role	Assigned Tasks
Tom Smith	Lead and coordinate strategic marketing planning process
Margaret Lopez	Investigate regulatory and legal issues in establishing enterprise

**Establish a Timeline--Estimate Hours (Unpaid or Paid) to Start-Up or Change Enterprises**

Activity		Start Date	Target End Date	Paid/Unpaid Mgmt. and Labor Costs
Form a team or recruit technical advisors.				
Assess target audiences and their needs.				
Determine vision and mission.				
Define goals and objectives.				
Determine key strategies to achieve goals: <ul style="list-style-type: none"> <li>• What steps are needed?</li> <li>• Fully developed marketing mix (4 Ps)?</li> </ul>				
Complete the written plan containing answers to all questions.				
Determine how staff or technical advisors will be recruited, trained, and supported as effective marketing representatives.				

### Vision and Mission

What is your mission? What do you hope to accomplish?

Enterprise	Mission/Vision	Desired outcomes
E.g., Greater Mountain Bird Observatory	<i>"To provide the highest quality experience to birders through nurturing plant and wildlife ecosystems that are unique to our region "</i>	<ul style="list-style-type: none"> <li>• Increase visitorship by birders</li> <li>• Raise visibility of partnering farms and community businesses through special events</li> <li>• Enhance the quality of experience for visitors to earn loyalty and promotion through word of mouth</li> </ul>

### Strategies/Goals/Objectives

Goals	Objectives	Outcome (how much of what by when)	Key Strategies
Increase direct revenues from birding visits	Recruit 50 new visitors for the upcoming season and encourage 140 of 200 visitors from last year to return	Increase visitor fees by 10% (\$300 add)	Enhanced marketing activities and strategic partnerships with birding organizations

### Strategic Marketing Actions

Goal	Action needed to achieve goal	Promotion techniques	Promotional resources needed, delivery method, etc.	Promotional cost (annual vs monthly vs intermittent?)	Timeline for implementation
Increase direct revenues from birding visits	Target mailings to previous visitors Send materials to share for "word of mouth"	<ul style="list-style-type: none"> <li>• Spring mailers,</li> <li>• Join Birding Associations,</li> <li>• Provide better signage</li> </ul>	Professional-looking cards, brochures  Cross-promotion with Birding Assn.  Access to signage programs, Welcome Centers		

## Assessing Target Audiences

Take a look at the groups of people you serve and what they need-[See Competitive Position Worksheet](#)

Target Audiences	Needs of theirs that we can fulfill
Avid birders	Access to rare or migratory species (with targeted events)
Beginning birders	Education and awareness

## Planning and Implementation Marketing Mix

Ideal Marketing Mix	Market Segment 1- Avid Birders	Market Segment 2- Beginning Birders	Market Segment 3
Ideal Product Mix <i>People</i> <i>Packaging</i> <i>Production Process</i>	Exclusive access to lands during high migratory season Updates on new species spottings	Educational programs  Experts on-site for special events	
Ideal Price Strategy <b>See Pricing Worksheet</b> <i>Price point(s)</i> <i>Potential promotion discounts</i> <i>Volume/Frequent buyer discounts</i>	Moderately priced "memberships" for access, discount for multi-year members  Premia for events if experts are on-site	Inexpensive (penetration) pricing for educational programs ...free for school age Develop loyalty among small set for future revenues	
Ideal Promotions Mix <i>Paid advertising</i> <i>Participation in industry/comm. events</i> <i>Public relations/free press</i>	Events Newsletters with updates	Signage Birding trails	
Ideal Place Strategy <i>List of different sales channels</i> <i>Inventory management plans</i> <i>Terms of trade</i>	Birding Trails  Recognition by Bird/Wildlife organizations	Partnering with schools and/or Nature Museum  Signage on Interstates	

**Evaluation and Revision**--revisit your plan to update it and revise as necessary.

**Evaluation of Marketing Actions**

Goal	Any Incomplete Actions/Modified Activities?	Outcomes of Marketing Activities/Promotion (sales change, target audience gained)	New Goals/Tools to monitor Marketing Activities/Promotion	Cost Effective Ideas to Expand Marketing and Promotion Activities
Increase direct revenues from birding visits	Did not send materials to share for "word of mouth"	<ul style="list-style-type: none"> <li>• One birding association organized visit to the ranch</li> <li>• Directly observed 10 visitors carrying spring mailer (out of 130 sent)</li> </ul>	<p>Website will provide coupon for free bird ID sheet to track new birders who find the ranch</p> <p>Facebook established to increase word of mouth (rather than mailer)</p>	<p>Start "fan club" within Social online marketing instead of mailings</p> <p>Develop simple bird ID handout, and offer it with online coupon to track referrals from Web</p>

# Pricing

	X		=		LABOR COST PER UNIT		ANNUAL OPERATING EXPENSE
LABOR HOURS PER UNIT		LABOR RATE PER HOUR					
			+		MATERIAL COST PER UNIT	÷	PROJECTED # OF UNITS SOLD
				_____		_____	BREAK-EVEN PRICE
(retailers put your average product costs here)				A	TOTAL PRODUCT COST PER UNIT	+	B
						TOTAL OPERATING COST PER UNIT	= \$
							A+B

•OBJECTIVES

- To reach a desired profit or return on investment level of  %
- To be a leader in experience/service innovation

PRICE ADJUSTMENT: UP OR DOWN  ↑

•MARKETING MIX ISSUES:

- Product/Service Characteristics  
higher price/lower volumes/higher service costs  
higher price/higher advertising/more personal selling
- Distribution  
price at which partners expect you to price: \$

PRICE ADJUSTMENT: UP OR DOWN  ↑

•COMPETITIVE OBJECTIVE:

- To beat the competition's price of \$  discount pricing
- To match the competition's price of \$  status quo pricing
- To exceed the competition's price by \$  premium pricing

PRICE ADJUSTMENT: UP OR DOWN  ↓

•BUYER PERCEPTIONS:

- Product quality perceptions
- Perceived prestige/unique experience
- Value perceptions(price/quality)

PRICE ADJUSTMENT: UP OR DOWN  ↑

•FINAL PRICE: (check by doing a break-even)

	ANNUAL OPERATING EXPENSES			
	<input style="width: 100%; height: 20px;" type="text"/>	=	=	<input style="width: 100%; height: 20px;" type="text"/>
BREAK-EVEN UNITS	\$ <input style="width: 80px;" type="text"/>	÷	=	<input style="width: 80px;" type="text"/>
	UNIT PRICE		=	PRODUCT COST PER UNIT
				Does this number of units sound reasonable?
				BREAK-EVEN UNITS PER YEAR
				FINAL PRICE

**Review Your Competitive Position-Identify and Name your Target Audience/Market**

A review of your enterprise’s relative strengths and weaknesses will help you to determine your competitive position in the market area. Compare your operation with your competition using the criteria below. Be sure to keep in mind your concept and the types of customers your hope to attract.

	<b>Competitive Strength &lt;-----&gt;</b>			<b>Competitive Weakness</b>	
Unique Experience	*	*	*	*	*
Proximity to Customers	*	*	*	*	*
Isolation from Crowds	*	*	*	*	*
Wildlife/Nature Resources	*	*	*	*	*
Level of Service	*	*	*	*	*
Ag Atmosphere	*	*	*	*	*
Appeal to Families	*	*	*	*	*
Food Quality	*	*	*	*	*
Facility Quality	*	*	*	*	*
Entertainment Value	*	*	*	*	*
Reputation/Reviews	*	*	*	*	*
Natural Resource Base	*	*	*	*	*
Pricing	*	*	*	*	*
Hours of Operation	*	*	*	*	*
Accessibility	*	*	*	*	*
_____	*	*	*	*	*
_____	*	*	*	*	*
_____	*	*	*	*	*

**Identify Target Audiences**

Use your list of competitive positions to determine who it may be most effective to target (or to change your positions if you think it would help your market opportunities).

1. Assess the primary needs and expectations your visitors might have about your enterprise and their visit given your competitive strengths.
2. Try to “label” these visitors by their priorities. Examples may include their desire for: family time, education about food and/or history, isolation and access to natural resources, convenient stop to break up a longer trip, a way to spend a fall Saturday afternoon near where they live.
3. Seek out research and resources to determine who big these groups might be and how they plan their trips. CSU’s current research focused on these market segmentation issues.

**Estimate Market Size-This will help with financial projections**

1. *Market Size:* Use secondary research from the industry or academics to assess the number of travelers looking for various types of experiences.
2. *Market Share:* Set goals of what share of those visitors to your area you could attract.
3. *If no research is available, or you have numbers from previous years, you may just skip to the next step, Project Customer Volume.*

**Project Customer Volume**

**You could divide this by targeted audiences if it would help you estimate as well.**

With an understanding of your competitive position in the market and with estimates of volume of other operations, you are ready to make projections of your customer volume potential:

1. Divide your operating year into seasons that describe the variability of your business (peak-season, middle-season, and off-season). Enter the number of weeks in each season in the appropriate box.
2. For each season, estimate the number of expected visitors
3. Calculate the number of visitors per season by multiplying weekly visitors by the number of weeks in that season.
4. Sum the totals from each season to determine your annual covers.

**CUSTOMER VOLUME PROJECTION WORKSHEET**

	Weeks	Adult Visitors	Children Visitors	Other Visitors	Total Visitors
<b>Peak Season:</b>	<input type="text"/>				
Weekday Visitors		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Weekend Visitors		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Weeklong Visitors		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<hr/>					
Weekly Total		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Peak Season Total		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Weeks	Adult Visitors	Children Visitors	Other Visitors	Total Visitors
<b>Nonpeak Season:</b>	<input type="text"/>				
Weekday Visitors		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Weekend Visitors		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Weeklong Visitors		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<hr/>					
Weekly Total		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Non Peak Season Total		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total Year</b>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>