



Marketing Plan Questionnaire & Worksheet

Business Name _____

Tagline _____

Market Needs/Trends

What is needed in your industry or market? Have you identified it? What is trending now?

Your Products and/or Services

Describe the benefits your products and/or services will provide

customers. Do not list features of your products/services but benefits instead... how your products or services will enhance your customers' lives or business.

Direct competitors

Have you identified your direct competitors? List them here along with their strengths and weaknesses.



Model competitor

What competitor do you think is most successful and would like to model your business after?

Describe Your Ideal Customer

Describe individuals or businesses that will buy your products or use your services. Sometimes it helps to look at some of your top customers and create a customer profile that includes information you know about them like gender, age, income, marital status, children and other demographic information.

What is your USP - Unique Selling Proposition?

What differentiates you from your competitors?

What's the best way to find your customers?

Where do they hang out or how can you reach them? Check all that apply.

- Email Marketing
- Social Media Marketing
- Video Marketing (YouTube and/or Vimeo)
- Pay Per Click Ads (PPC- Google AdWords)
- Banner Ads or Links
- Blogging
- Guest Blogging on other websites
- Search Engine Optimization (SEO)
- Direct Mail
- Postcard Marketing
- Print display or classified ads



- Affiliate Marketing
 - Radio Ads
 - TV Ads
 - Online Business Directory Advertising
 - Referrals/Word of Mouth
 - Networking
 - Speeches, Seminars and Webinars
 - Trade Shows
 - Text Messaging
 - Door to Door
 - Other (please specify below)
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How does your target audience find products and services like yours now?

Estimate costs for marketing methods chosen to reach your target audience.

- Business Identity Package (if you have a new business - logo, color scheme, favicon, business cards)
- Responsive Website (if this is a new business and a website is needed)
- Email Marketing to internal list of customers and leads (ESP monthly fee)
- Targeted Email Campaigns (email list, graphic design of email, deploying email, reporting results)
- Social Media Marketing (staff time, outsourcing)
- Video Marketing (video editing software, shooting video, outsourcing)
- Pay Per Click Ads (PPC- Google AdWords)
- Banner Ads or Links
- Blogging (staff time, photography & art costs)
- Guest Blogging on other websites
- Search Engine Optimization (SEO) (staff training, time spent or outsourcing)
- Direct Mail (mailing lists, graphic design, printing, postage)
- Print display or classified ads
- Radio Ads
- TV Ads
- Online Business Directory Advertising
- Speeches, Seminars and Webinars
- Trade Shows
- Text Messaging
- Door to Door

