



# MARKETING STRATEGY TEMPLATE

START-UP ORGANISATION, PRODUCT OR SERVICE

## Executive Summary - rundown of what's in the document (often completed last)

### Purpose

Use this template to capture the key information that you need to develop a thorough marketing strategy. Then use the information that you collect, along with other \*development tools, to build your marketing strategy.

This template is divided into the following question sections:

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\*Other development tools you may use:

SWOT (strength, weakness, opportunities and threats)

Pest(le) (external scan of the political, economical, social technological, legal and environment surroundings)

Competition Analysis (external scan of what, and how others do business, their strengths & products)

Environmental Scan (internal scan often used to considering the factors that will influence the direction and goals of your organization)

Scenario Planning (often used to assess what if actions)

Psychometric/Personality Assessment (often used internally to gauge behaviour, identify hidden skills and capabilities of employees)

Focus Groups (often carried out as part of strategic planning)

# Marketing Strategy Template

## New / Start - Up Organisation or Service

### 1. Background

**A. What business are we in? (What needs does our organisation meet in the marketplace?)**  
(2-3 sentences)

**B. What services and/or products do we provide?**  
(1 paragraph)

**C. What are our organisation's objectives over the next two years? Be as specific as possible, and make sure to address the following goals:**

- Number of users/customers
- Revenue
- Profit
- Market share

**D. What compelled us to start this organisation/service?**

## 2. Market

**A. What is the market opportunity? What is the market size? Be sure to look at market size with respect to geography.**

**B. How can the market be segmented into logical customer/user groupings?**

**C. What are the key sector trends that are inspire our success? What sector trends can inhibit our success?**

**D. What is the economic climate now and in the next couple of years? How will the economic climate affect our organisation/service?**

**E. Is our organisation or market affected by business cycles or seasons? If so, describe how it is affected.**

# 3. Target Audience

**A. What market segments are we targeting (list segment name and characteristics)? What segments are we not targeting?**

**B. What kind of audience are we targeting? What are its members' demographics and psychographics (for example, what keeps them awake at night, including both fears and opportunities)? List multiple audiences in order of priority.**

**C. What is our customer's primary reason for buying or wanting to use our product or service?**

**D. Why would someone prefer our offering versus that offered by the (other organisations) competition? (You might want to answer the section on competition and then come back to this question.)**

**E. Are there any issues or concerns that the target audience might have regarding this type of product**

# 4. Competition

*For Consideration: competition, for charities and non profits might defer slightly from the for profit sector, nonetheless these kinds of organisations compete for volunteers, donations and so on, even if the intent is quite different. Clearly most non-profits don't want to damage their "competitors" (other non-profits also doing good works), but they do need to consider that there is a form of competition in play.*

**A. What categories of competition threaten our success? Label each category, and identify its key characteristics. Prioritise the categories from greatest to least threatening.**

**B. Which companies pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten our success? List the strengths and weaknesses for each of these elements.**

**C. Which competitors have the largest market share within our target market segments? Which competitors have the greatest visibility with our target audience?**

**D. How will we differentiate ourselves to best challenge competition?**

**E. What barriers to entry into the marketplace are we creating for ourselves?**

## 5. Offering

**A. What need is our service/product designed to fill? Identify the need for each target audience.**

**B. What features and associated benefits does our offering provide? Identify features and associated benefits for each target audience. (Our proposition)**

**C. How do we deliver the features identified in item B? Be specific—this is the proof that we can do what we say.**

**D. Of these features, which ones differentiate us from the competition?**

**E. What improvements can we make to our offering to better meet customer needs?**

**F. What new offerings would our customers most like us to develop?**

## 6. Messages

**A. What does each of our identified target audiences know and believe about us today?**

**B. What is the single most important message that we must communicate to ALL of our target audiences?**

**C. What evidence can be used to support the claim that we make in our single most important message?**

**D. List the single most important message that we must communicate to EACH target audience. (This might or might not be the same answer as in item A.)**



## 6. Messages (CONT)

E. What evidence can be used to support the claims for each message listed in item D?

F. What happy clients do we have today that we can reference in our communications? What service did they buy/ make use of from us, and why are they happy?

G. What kind of personality do we want to portray in our communications? What tone? What passion?

H. What is the net impression about our organisation or offering that we want clients and partners to take away after each interaction with our organisation?

# 7. Sales and Buying Process

**A. What is the process for selling our services or products (list the key milestones in the process)? Do we use any of the following processes?**

- Direct personal sale
- Direct online sale
- Indirect through channels

**B. Who is involved, both from our organisation and from our transaction channel partners, in each step of the sales process?**

**C. How does our target audience buy our type of offering? Is the purchase an impulse buy or a planned purchase?**

**D. What purchase process steps do the members of our target audience follow? Does this process vary based on the organisation (seller) that they select? If the process does vary, explain how and/or why?**

**E. What buying criteria does our target audience use to select an offering?**

**F. What criteria does our target audience use when selecting an organisation?**

## 8. Pricing

- A. How important is price in the decision process? (See the “Sales and Buying Process section” above.)
- B. What is our current pricing structure, including discounts, tiered options, reimbursements and so on? Do our customers understand it?
- C. Which of our competitors is considered the price leader? What does the price leader charge for its offering? How does the price leader determine its price?
- D. What are our other competitors charging for their offerings?
- E. What can be done to reduce costs without affecting quality?

## 8. Pricing (CONT)

**F. What \*tradeoffs of price or value, or of both price and value, do customers make?**  
(Trade-offs: giving up of one benefit, advantage, etc. in order to gain another)

**G. What is the perceived value of our offering as compared to its price?**

**H. What service(s) do we currently include in the price of our product? What services can we consider now and in the future?**

**I. Are competitive price changes anticipated in the near future?**

**J. What sector trends are going to drive prices up? What sector trends are going to drive prices down?**

# 9. Communication & Promotion

A. What written material of organisation to you have, is the language simple and easy to read?

B. How are you communicating the true needs that are being addressed by your service?

C. How frequently do your customers review their service provider?

D What events that are being held which could increase your organisations viability?

E What is the normal communication pattern with your customers? Can you add marketing activities to this communication?

F What information material do you already give to your customers/potential customers? How clear is this on your organisations brand? And what services you offer?

G What other materials or information do you think would be of benefit to your customers to help them make informed choices?

H How else would your customers like to hear about your organisation and the services it provides

I. Which key channels of communication will be most useful and relevant for your customers?

**J What would be the most effective channel to communicate with your customers and how?**

**K How do you plan to provide an after-care service to your customers? And what channels will be most effective?**