



MARKETING PLANNING GUIDE FOR 2009

Study and complete this easy Marketing Planning Guide and you will get focused on your plans, goals and strategies for 2009. While not all of this will apply to your business, use what fits. We wish you the best in 2009!

First, some analysis of your last year's business:

Sales and Profit

1. 2008 Sales
2. 2008 Net Profit
3. Percentage Change from Prior Year

Marketing Expenses

1. Sales Force
2. Advertising and Sales Promotion
3. Trade Shows and Events
4. Website
5. Publicity Development

Customer Profile

1. Number of Customers
2. Average Annual Purchases
3. 80/20 Rule
 - a. How many customers did it take to comprise 80% of your business?
 - b. What was the Average Annual Purchase volume from top customers?
 - c. Do you have a database of key customers and contacts?

Top Customer Profile (80%)

1. What products/services do they buy?
2. How much (\$) do they buy of each product/service?
3. What were the primary reasons these customers buy from you?
4. How much did they spend with your competition?
5. What % of your Marketing Expenses are spent on top customers?

Bottom Customer Profile (20%)

1. What products/services do they buy?
2. How much (\$) do they buy of each product/service?
3. What were the primary reasons these customers buy from you?
4. How much did they spend with your competition?
5. What % of your Marketing Expenses are spent on bottom customers?

Non Customer (New Prospect) Profile

1. What prospects are there who are not buying, but have high potential?
2. How much (\$) did they buy of each product/service from competitors?
3. What are the primary reasons these customers don't buy from you?

Next, some projections for the coming year:

Sales and Profit

1. 2009 Sales
2. 2009 Net Profit
3. Percentage Change from Prior Year

Marketing Expenses

1. Sales Force
2. Advertising and Sales Promotion
3. Trade Shows and Events
4. Website
5. Publicity Development

Customer Profile

1. Number of Customers
2. Average Annual Purchases
3. 80/20 Rule
 - a. How many customers will it take to comprise 80% of your business?
 - b. What will the Average Annual Purchase volume from top customers?

Top Customer Profile (80%)

1. What products/services will they buy?
2. How much (\$) will they buy of each product/service?
3. What are the primary reasons these customers will buy from you?
4. How much will they spend with your competition?
5. What % of your Marketing Expenses will be spent on top customers?
6. Which customers will fall out of the "top customer " classification?

Bottom Customer Profile (20%)

1. What products/services will they buy?
2. How much (\$) will they buy of each product/service?
3. What are the primary reasons these customers will buy from you?
4. How much will they spend with your competition?
5. What % of your Marketing Expenses will be spent on bottom customers?
6. Which "bottom customers" will become "top customers?"

Non Customer (New Prospect) Profile

1. What prospects are there who are not buying, but have high potential?
2. How much (\$) will they buy of each product/service from competitors?
3. What are the primary reasons these customers don't buy from you?
4. What % of your Marketing Expenses will be spent on reaching non customers with potential?
5. How much will they spend with you first year?

Next, an analysis of your competitors:

Top Competitors

1. By product/service classification, who are your major competitors?
2. By competitor, how much business do they do in each of your product/service classifications?
3. Why do people buy from them, by product/service classification?
4. By competitor, which will grow and which will decline in coming year?
5. By product/service classification, what are your strengths/weaknesses as compared to each competitor?
6. What are your primary differentiators from your competitors, in each product/service classification?
7. How much (\$) does each competitor spend on marketing-related activities:
 - a. Sales Force
 - b. Advertising and Sales Promotion
 - c. Trade Shows and Events
 - d. Website

Finally, some ideas, strategies and tactics you can implement quickly:

Top Customers/Prospects

1. Divide top customers by classification of products/services they purchased last year.
2. Compare purchases last year with purchases year before.
3. Study the reasons for increases/decreases in purchases.
4. Determine how much of your Marketing money you spent on each customer/prospect.
5. Identify what worked and what didn't work relative to increases/decreases.
6. Define key buying motives for each classification of products/services.
7. Refine your knowledge of key customers' buying motives.
8. Develop a target list of top customers with highest potential for increase.
9. Develop a target list of bottom customers with highest potential for growth.
10. Determine strategies to spend more resources on highest potential customers and prospects.
11. Study the differences (differentiators) between you and your competitors.
12. Develop a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis and compare it with each competitor.

Your Marketing Plans, Programs and Strategies

1. Look at each expense category and analyze what worked/didn't work.
2. Add dollars to the task of building your database of clients and prospects.
3. Add dollars to the task of getting to know your clients and prospects better.
4. Spend more time looking for ways to get publicity (it's free!)
5. Spend an appropriate amount of money on your website, SEO, SEM and Email Marketing.
6. Hold team meetings to brainstorm ways to get better known in the market.
7. Assign individual responsibility to spend time with top clients/prospects.
8. Brainstorm publicity angles; donate time to charitable groups, become involved with community affairs.
9. No matter how flat the economy, keep promoting your business.
10. Find ways to give better customer care at all contact points within your company.