

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. Type over the red text to add your own content.

Pre-Planning

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

Name and Role	Assigned Tasks
Example: Rita Meyer, RSVP Director	Lead and coordinate strategic marketing planning process

Establish a Timeline

Activity	Start Date	Target End Date
Form a team.		
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">• What steps are needed?• What technologies must be in place?• What delivery methods will be used?• What marketing materials will be used?		
Complete the written plan containing answers to all questions.		
Determine how staff and volunteers will be recruited, trained, and supported as effective marketing representatives.		
Other:		

Assessing Target Audiences

Take a look at the groups of people you serve and what they need