

## **Strategic Marketing Plan Example**

This example was developed for a benefits company. It would obviously be customized to your industry.

This is the base document. From here we would add detail, assign tasks, attach a timeline for each item and a budget.

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### **Mission**

Solicit, educate and serve clients in all stakeholder groups

### **Objectives**

- Reach prospective clients via multiple channels
- Present salient information within easy reach of each group in their language
- Bring value to each target group on a human and financial level.

### **Tactics – Phase I**

#### **Create logo and corporate identity**

- Keywords: simple, progressive, contemporary, collaborative
- Need branding that allows extension into product categories (color scheme, icons or symbols)

**Create website content** catering to each stakeholder group, so they feel that we listen and understand the issues they are faced with

**Create collateral** to introduce the plan

- Brochure (two versions)
- Business cards
- Pocket folder
- Folder content
- CD
- Sales flyers
- Possibly create app for iOS and Android

#### **Create social media presence**

- Primary: LinkedIn profile, become an active part of relevant groups on LinkedIn, start your own groups and discussions.
- Secondary: blog
- Tertiary: Facebook page and Twitter

#### **Produce Video**

- Publish on You Tube and on the website
- Send video mail

## **Phase II**

- Speaking engagements
  - Seminars
  - Webinars
  - Ruth's Chris invites
  - Loyalty program (for existing customers)
  - Referral program
  - Tradeshow
  - Association Expos
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## **Value Proposition – What's in it for THEM**

### **Stakeholder I**

- Mitigate risk
- Low cost
- Scalable up or down
- Economies of scale even for small clients
- Liability is shifted to external entity
- Ability to outsource labor-intensive database management

### **Stakeholder II**

- Concise
- Flat Fee/low cost
- Easy to communicate to HR/employees
- Benefits that are normally reserved for large companies only
- Be the problem solver for the internal HR administrator

### **Stakeholder III**

- Mitigate risk
- Low cost
- Flexible to adapt to changing business environment
- Taking advantage of “strength in numbers” – even small companies are an 800 pound gorilla
- No liability on the company's shoulders
- Efficient, automated
- Lets you do what you do best (takes admin and tedium away)
- Meaningful advantages, lets HR person be the hero for once.

## **SWOT Analysis**

### **Strengths**

Agility – company can turn on a dime with changing market or legal environment  
Benefits that only one or two competitors offer  
Unique combination of benefits  
Affordability

### **Weaknesses**

Lack of brand recognition  
“Small” may be perceived as “inexperienced”  
Core team is not established yet (uncertainty)

### **Opportunities**

Create a custom tailored team of experts  
Mine a market that was completely neglected (smaller companies)  
Trademark or patent certain processes

### **Threats**

Copy cats  
Technical issues  
Litigation