

Strategic Marketing Plan Worksheets

R. HENRY MIGLIORE, PH.D.

*Adjunct Professor
Oklahoma State University/Tulsa
Langston University/Tulsa*

*Professor Emeritus
Northeastern State University*

*President, Managing for Success
Jenks, Oklahoma*

STRATEGIC MARKETING PLAN TO SUPPORT THE ORGANIZATION'S OVERALL BASIC PLAN

OUTLINE

The organization's overall strategic plan is developed according to the following format. The Marketing Manager, as part of the organization's top management team, has played a vital and integral role in developing this overall plan.

1. Purpose
 - a. What is your "reason for being," your "mission," why products and/or services are needed, customers and/or people served, needs met in marketplace, and scope of the endeavor?
 - b. Nationwide and/or local, ethics, profit, or nonprofit.
2. Environmental Analysis
 - a. Pulse
 - b. Now or past
 - c. Industry surveys
 - d. Completed studies of future done now
3. S & W (usually internal)
 - a. Human
 - b. Facilities/equipment
 - c. Patents/resources natural
 - d. Financial
4. Assumptions
 - a. Have no control over
 - b. Extend environmental analysis
 - c. Usually external
5. Objectives and Goals
Specific time frame, objectives, and goals including specific time frames measurable in key result areas. Note all rules for objectives in Migliore's book *Strategic Planning and Management*.
6. Strategy—Two to three strategies for each objective: Thinking stage, Where and how to commit resources, Timing, Pricing policy

7. Issues/Problems—What are the major/minor problems facing the organization that would prevent it from achieving its objectives?
 - a. Major
 - b. Minor
8. Analysis
 - a. Industry/competitive/organizational situation analysis
 - b. Functional; marketing, financial accounting, management, production, and people
9. Alternative Solutions
 - a. List of alternatives
 - b. Pros/cons of each
10. Recommended Course of Action
 - a. Alternative Selected
 - b. Justification

Once the strategic direction has been set, problems identified, an overall course of action set, and the marketing manager has contributed to the plan, then and only then can the marketing plan be started. The marketing and public relations plans are developed hand-in-hand. Each contributes to the other's success. Using the same philosophy and basic team principle, the marketing plan is developed. All staff/line managers that report to the Marketing Manager play an active role in the development of the marketing plan. The Marketing Manager and others then concentrate on a marketing plan that will support the overall organization.

Marketing Plan

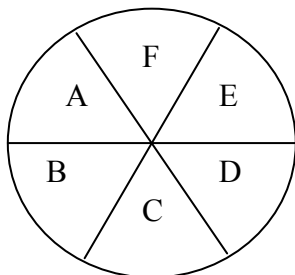
Purpose of Marketing Function:

- Differentiate our organization, products, and services from the competition
- Keep existing customers
- Meet and exceed customer expectations
- Create new customers
- Make our organization the kind that people want to do business with
- Operate in an ethical manner
- Monitor the pulse of the marketplace
- Serve and contribute as a member of the organizational team
- Maintain a positive image of the organization with all advertisements

Environmental Factors Specific to Marketing:
Market Analysis

1. Customer Analysis
2. Competitive Analysis/Benchmarking
3. Opportunity Analysis
4. Market Research

Identify Key Market Segments



- A _____
- B _____
- C _____
- D _____
- E _____
- F _____

What products do you expect to be best opportunity in year 2012?

1.

2.

3.

4.

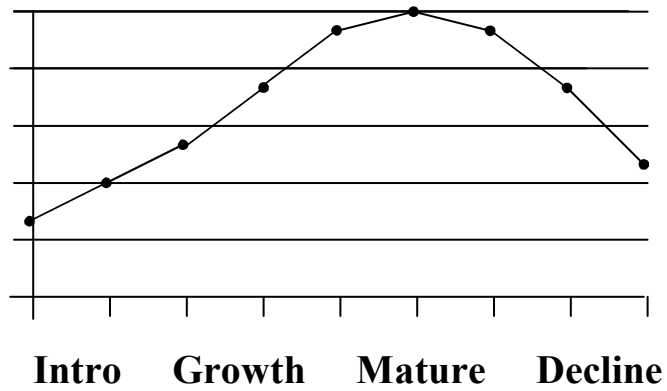
5.

Which products will decline and/or present a problem to remain in competition in five years (2012)?

Put yourself in your customers' shoes. Why are they buying from you?

What is your competition doing that could be a threat?

Where do all (or most) of products fit product life cycle?



List Products/Services

A.

B.

C.

D.

E.

F.

G.

HOW DO PRODUCTS/SERVICES/PROGRAMS FIT PERFORMANCE/POTENTIAL MATRIX?

10 E C N A M R O F R E P	Cash Cows	Stars
	Dogs	Problem Child
	1 POTENTIAL	10

WHAT IS PRESENT CONTRIBUTION TO ACHIEVING THE PHILOSOPHY STATED IN THE MISSION STATEMENT PER PRODUCT LINE/SERVICES/PROGRAMS?

Product/Service A

Product/Service B

Product/Service C

WHAT IS EXPECTED CONTRIBUTION TO PROFIT PER PRODUCT IN FIVE YEARS IF YOU STAY WITH PRESENT PRODUCT/SERVICE/PROGRAM MIX?

Product/Service A

Product/Service B

Product/Service C

Marketing Strengths and Weaknesses

Marketing Assumptions

- 1.
- 2.
- 3.

Major Marketing Objectives should consider sales, profitability, and customer.

OBJECTIVES

	Last Year Actual	Next Year	5 Years
<p>Sales Total Sales/Revenue Net sales per dollar of net worth Net sales per dollar of total assets Net sales per dollar of net working capital Net sales per dollar of depreciated fixed assets</p>			
<p>Market Potential Percent regional market share Percent local market share Percent product in introductory stage Percent product in maturity stage Percent product in declining stage</p>			
<p>Marketing Research Usually on a project basis</p>			
<p>Sales Management Revenue per territory Quotas/objectives for sales teams Quotas/objectives per person</p>			
<p>Customers Satisfaction On time delivery</p>			

MARKETING STRATEGY

WHAT IS OPTIMUM PRODUCT/SERVICE/PROGRAMS MIX?



- WHAT PRODUCTS/SERVICES/PROGRAMS SHOULD BE ADDED TO PRESENT PRODUCT MIX?
- WHAT PRODUCTS/SERVICES/PROGRAMS SHOULD BE DROPPED FROM PRESENT PRODUCT MIX?
- HOW DO YOU REACT TO A RAPIDLY CHANGING MARKET PLACE?
- WHAT OPPORTUNITIES ARE AVAILABLE DUE TO CHANGES?
- WHAT ARE KEY MARKETING STRATEGIES?
- ANALYZE HOW TO PROMOTE AND SELL
- ANALYZE HOW TO MIX INTERNET NEWSPAPERS, MAGAZINES, BILLBOARDS, DIRECT MAIL, RADIO, TELEVISION, TELEMARKETING, AND SPECIAL EVENTS

MONITORING AND CONTROL

1. PERFORMANCE ANALYSIS
2. CUSTOMER DATA FEEDBACK

MARKETING ACTION PLAN

Objectives: Marketing

Overall Responsibility: _____

Strategies: Product, Market Position, Distribution Channel and Pricing

Start Date	Action Steps	Due Date	Responsibility	Status

Objectives: Research and Development

Overall Responsibility: _____

Strategies: Percentage of products in what stage of research

Start Date	Action Steps	Due Date	Responsibility	Status

Set Up Way to Monitor How You Are Doing and a Way to Create Action.

An action plan for each objective area should be developed. The action plan puts objectives, strategies, and operational plans into perspective with each other and helps you develop the inter-relationship between the phases. It helps goals come to life with appropriate action.

ACTION PLAN

OBJECTIVE:

STRATEGIES:

- A.
- B.
- C.
- D.
- E.

ACTION PLAN	PERSON RESPONSIBLE	START DATE	DATE COMPLETED

SALES MANAGEMENT PLAN

Now that the marketing plan is developed, it is time to develop a sales management plan. Ideally, managers and salesmen have been in on developing the marketing plan. It is important that those who execute the plan are in on the plan. The task is to develop a sales management plan, which in effect executes the marketing plan.

Sales Management Plan

Organize sales force

Select sales force

Train sales people

Motivate

Set quotas, goals, objectives for total sales effort down to individual salesperson.

Compensation plan that encourages performance

Evaluate progress

R. HENRY MIGLIORE

Dr. Migliore is President of Managing for Success, an international consulting company. He was Professor of Strategic Planning and Management at Northeastern State University/Oklahoma State University—Tulsa from 1987-2002; Dr. Migliore teaches at the graduate and undergraduate levels. He was formerly Professor of Management and former Dean of the ORU School of Business from 1975 until 1987. He was a visiting professor at the University of Calgary, fall 1991; ITESM Campus Guadalajara, Guadalajara, Jalisco, Mexico, spring 1995; and Singapore in 1997.

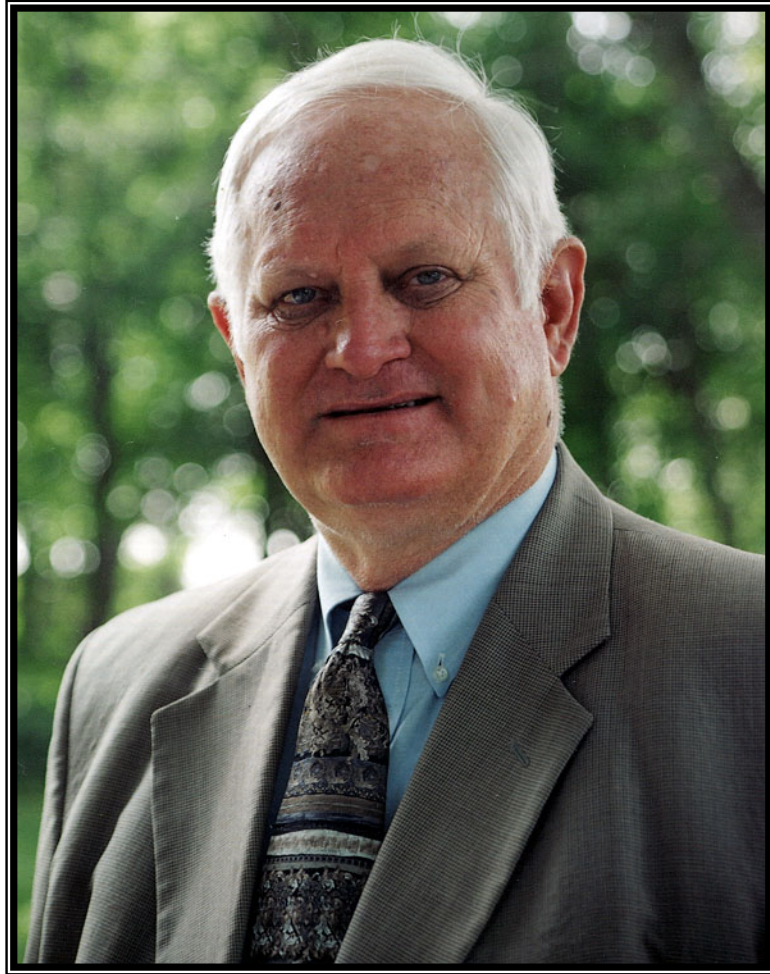
He is former manager of the press manufacturing operations of Continental Can Company's Stockyard Plant. Prior to that, he was responsible for the industrial engineering function at Continental's Indiana plant. In this capacity, Dr. Migliore was responsible for coordinating the long-range planning process. In addition, he has had various consulting experiences with Fred Rudge & Associates in New York and has served large and small businesses, associations, and nonprofit organizations in various capacities. He has made presentations to a wide variety of clubs, groups, and professional associations. Dr. Migliore has been selected to be on the faculty for the International Conferences on Management by Objectives and the Strategic Planning Institute Seminar Series. He is also a frequent contributor to the Academy of Management, including a paper at the 50th anniversary national conference. He served for 12 years on the Board of Directors of T. D. Williamson, Inc., and was previously on the Boards of the International MBO Institute, Brush Creek Ranch, and the American Red Cross/Tulsa Chapter, and is chairman of a scholarship fund for Eastern State College. In 1984 he was elected into the Eastern State College Athletic Hall of Fame. Dr. Migliore has been a guest lecturer on a number of college campuses. He has lectured for the Texas A & M—Pepperdine, ITESM—Guadalajara, and the University of Calgary Executive Development Programs. He serves on Chamber and/or Civic Committees, and he served on the Administrative Board at The First United Methodist Church, Tulsa, Oklahoma. He was selected Who's Who on a list of 31 top echelon writers and consultants in America.

To date, previous articles on management and business subjects have appeared in *AIIE Journal*, *Construction News*, *Management World*, *Management of Personnel Quarterly*, *Journal of Long-Range Planning*, *Dental Economics*, *Health Care Management Review*, *MBO Journal*, *Business and Society Review*, *Parks and Recreation Journal*, *The Journal of Business Strategy*, *Daily Blessing*, *Ozark Mountaineer*, *On Line*, *Real Estate Today*, *Communication Briefings*, *Journal of Sports Management*, *Alberta Business Review*, *The Planning Review*, *Hospital Topics*, *Journal of East-West Business*, *Journal of Ministry Management*, *IIE Solutions*, *Industrial Safety and Hygiene*, *Debt-Free Living*, *Supply Chain Management*, and two Mexican journals. His books include *MBO: Blue Collar to Top Executive*, *An MBO Approach to Long-Range Planning*, *A Strategic Plan for Your Life*, *Strategic Long-Range Planning*, *Strategic Planning for Church and Ministry Growth*, *Common Sense Management: A Biblical Perspective*, *Personal Action Planning: How to Know What You Want and Get It*, and *Tales of Uncle Henry*. They describe personal theories and experiences. He contributed to the books, *Readings in Interpersonal and Organizational Communication* and *International Handbook on MBO*. The book *The Management of Production: A Productivity Approach* is coauthored. Other books include *Strategic Planning and Management*, *Strategic Life Planning*, and *Common Sense Management*. The manuscript *People, Productivity, and Profits* has been completed. He is coauthoring a series of books with Haworth Press. Released so far are *Church and Ministry Growth* (1995), *Planning for Nonprofit Management* (1995), *Strategic Planning and Health Care* (1996), *Strategic Planning for Private Universities* (1997), and *Strategy Planning for Collegiate Athletics* (spring 2000). *Strategy Planning for Higher Education* and *Planning for City Government* will be completed in the year 2003. *Strategic Long-Range Planning for the New Millennium* was updated and published in June of 2002. His books have been translated into Russian, Chinese, Korean, Spanish, German, and Japanese. A Spanish version of *Strategic Planning* coauthored with Gonzalo Rivero, will have an early edition out in February 2002. He has also produced "Personal Financial Success," an ORU video training kit offered on nationwide television, and video/audio tapes to go with his books. Dr. Migliore has developed three complete videotaped and computer Internet web-based correspondence courses.

In November 1985 the daily "Managing for Success" cable television program was inaugurated and was on the air until March 1986. It was on Tulsa Cable. The series began again on Tulsa Cable in September 1986. He writes occasional columns for the *Tulsa World*, *Tahlequah Pictorial Press*, *Collinsville News*, *Jenks Journal*, and *Muskogee County Times*. A complete video series with four summary units and thirty-six support units covering planning, management, and common sense management supports other material.

In November 1998 Dr. Migliore was inducted into the Eastern Oklahoma State Hall of Fame. This followed his induction in 1988 into the Eastern Athletic Hall of Fame.

Dr. Migliore has been a small business consultant for the Oklahoma Small Business Development Center for 13 years. Dr. Migliore holds degrees from Eastern Oklahoma State, Oklahoma State University, St. Louis University, and completed his doctorate at the University of Arkansas. He belongs to the Academy of Management and the Planning Executives Institute and is a senior member of the American Institute of Industrial Engineers.



DR. R. HENRY MIGLIORE

**www.rhenrymigliore.com
hmigliore@aol.com**