SAMPLE MARKETING PLAN

Association: Fiscal Year: A. Establish Goals Be SMART with your goals—specific, measurable, attainable, realistic, and time-bound. Overall Goal #1:
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Overall Goal #1:
Overall Goal #2:

Exampe: We need 15,000 visitors to our website, 2,000 new leads, and 500 new members within the next 12 months in order to achieve our revenue goal of \$200,000 from inbound marketing.

B. Determine Your Audience

Primary Audience #1:	Primary Audience #2:		
Fill in all that are applicable.	Fill in all that are applicable.		
Demographics	Demographics		
Age:			
Gender:			
Household income/company revenues:	Household income/company revenues:		
Geography:	Geography:		
Years in business/profession:	Years in business/profession:		
Political affiliation:	Political affiliation:		
Hobbies/special interests:	, and the second		
Other:	Other:		
History with your association	History with your association		
Past purchase history:	Past purchase history:		
Events attended:	Events attended:		
Years as a member:	Years as a member:		
Volunteer positions:	Volunteer positions:		
Other:	Other:		
Online behaviors	Online behaviors		
Web pages visited:	Web pages visited:		
Articles or e-books downloaded:	Articles or e-books downloaded:		
Email opens:	Email opens:		
Email clicks:	Email clicks:		
Other	Othor		

C. Focus on Your Value
What is your association's vision statement:
What is your association's mission statement:
What is your association's value proposition:
Tangible Benefits
Brainstorm a list of tangible benefits and calculate the potential ROI if possible.
What are the tangible benefits of
becoming a member of your association:
attending an event put on by your association:
buying a product from your association:
getting a certification from your association:

D. Determine Your Channels and Formats

What channels/platforms does your association CURRENTLY use? Check all that apply.

INTERNET MARKETING	PHYSICAL MARKETING	Out of the channels/
Website	☐ Exterior signage	platforms you currently use,
Search engine optimization	☐ Digital signage	which ones work best?
Retargeting	☐ Interactive signs	
Newsletter	☐ Customer loyalty	
Live chat	Giveaways	
☐ Podcast	☐ Promotions	
Whitepapers	Brochures	
Webinars	☐ Packaging	
Blogging	☐ Free consultations	
Chatbots		
☐ Augmented/virtual reality	PAID ADVERTISING	
	☐ Podcast ads	
SOCIAL MEDIA CHANNELS	☐ Affiliate marketing	
☐ Facebook page	Billboards	Out of the channels/
☐ Facebook groups	Mailers	platforms you currently use,
☐ Facebook ads	☐ Print advertising	which ones work the least?
LinkedIn page	☐ Radio advertising	
LinkedIn groups	☐ Social advertising	
☐ LinkedIn ads	☐ TV advertising	
☐ Google My Business		
☐ YouTube channel	PUBLIC RELATIONS	
☐ Instagram page	☐ Press releases	
☐ Instagram ads	☐ Media interviews	
☐ Twitter page	□ Sponsorships	
☐ Twitter ads	☐ Speaking events	
☐ Pinterest page	☐ Conferences	
☐ Pinterest ads	☐ Host event	
☐ Live video		
☐ Influencers		

What channels/platforms does your association want to TRY this fiscal year? Check all that apply.

INTERNET MARKETING	PHYSICAL MARKETING	Rank the channels/platforms
Website	☐ Exterior signgage	your associations wants to
☐ Search engine optimization	☐ Digital signage	try this fiscal year from most
Retargeting	☐ Interactive signs	important to least
Newsletter	☐ Customer loyalty	important with a potential
☐ Live chat	Giveaways	budget for each:
☐ Podcast	☐ Promotions	
Whitepapers	Brochures	
Webinars	☐ Packaging	
Blogging	☐ Free consultations	
☐ Chatbots		
☐ Augmented/virtual reality	PAID ADVERTISING	
	☐ Podcast ads	
SOCIAL MEDIA CHANNELS	☐ Affiliate marketing	
☐ Facebook page	☐ Billboards	
☐ Facebook groups	☐ Mailers	
☐ Facebook ads	☐ Print advertising	
☐ LinkedIn page	☐ Radio advertising	
LinkedIn groups	☐ Social advertising	
☐ LinkedIn ads	☐ TV advertising	
☐ Google My Business		
☐ YouTube channel	PUBLIC RELATIONS	
☐ Instagram page	☐ Press releases	
☐ Instagram ads	☐ Media interviews	
☐ Twitter page	☐ Sponsorships	
☐ Twitter ads	☐ Speaking events	
☐ Pinterest page	☐ Conferences	
☐ Pinterest ads	☐ Host event	
☐ Live video		
☐ Influencers		

^{**}List of marketing channels source: https://blogs.spectrio.com/51-most-effective-marketing-channels-for-advertising-your-business

What formats does your association CURRENTLY use? Check all that apply.

AWARENESS/INTEREST	CONSIDERATION/DECISION
☐ Blog posts	☐ Tutorials
☐ Emails	☐ Product reviews
□Infographics	☐ Product demos
☐ Podcasts	☐ Data sheets
☐ Newsletters	☐ Free trials
☐ e-Books	☐ Testimonials
☐ Cartoons/illustrations	☐ Stories
☐ FAQ sheets	☐ Case studies
☐ Webinars	
☐ Templates	Out of the formats you currently use, which ones work best?
□Videos	
☐ Guides	
☐ Toolkits	
□Vlogs	
☐ Interviews	
☐ Presentations	
Quizzes	
Research articles	
☐ Annual reports	Out of the formats you currently use, which ones work
□ Whitepapers	the least?
Surveys	
☐ Timelines	

What formats does your association want to TRY this fiscal year? Check all that apply.

AWARENESS/INTEREST	CONSIDERATION/DECISION	Out of the formats you want
☐ Blog posts	☐ Tutorials	your association to try this
☐ Emails	☐ Product reviews	fiscal year, list out past
□ Infographics	☐ Product demos	content you could
☐ Podcasts	☐ Data sheets	re-purpose into this format:
Newsletters	☐ Free trials	
☐ e-Books	☐ Testimonials	
☐ Cartoons/illustrations	Stories	
☐ FAQ sheets	☐ Case studies	
Webinars		
☐ Templates		
□ Videos		
☐ Guides		
☐ Toolkits		
□Vlogs		
☐ Interviews		
Presentations		
Quizzes		
☐ Research articles		
☐ Annual reports		
□Whitepapers		
Surveys		
☐ Timelines		

E. Create a Marketing Calendar

List your association's events/offerings with dates:
Holidays to consider:
Industry events to consider:

lacktriangle Download sample marketing calendar

January 2020 SAMPLE MARKETING CALENDAR						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31 New Year's Eve	1 New Year's Day	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20 Martin Luther King Jr.	21	22	23	24	24
26	27	28	29	30	31	1

CHANNEL #1:				
TOPIC/OBJECTIVE	ACTION ITEMS	DUE DATE(S)	RESPONSBILITY	NOTES
Topic/Objective #1:				
Topic/Objective #2:				

CHANNEL #2:				
TOPIC/OBJECTIVE	ACTION ITEMS	DUE DATE(S)	RESPONSBILITY	NOTES
Topic/Objective #1:				
Topic/Objective #2:				

CHANNEL #3:				
TOPIC/OBJECTIVE	ACTION ITEMS	DUE DATE(S)	RESPONSBILITY	NOTES
Topic/Objective #1:				
Topic/Objective #2:				

F. Execute and Track

Now that you have a plan, you're ready to launch. Don't forget to track results to inform your
efforts going forward.