

# SAMPLE MARKETING PLAN

Association: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Fiscal Year: \_\_\_\_\_

## A. Establish Goals

Be SMART with your goals—specific, measurable, attainable, realistic, and time-bound.

Overall Goal #1: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Overall Goal #2: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Example:** 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:

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*Fill in all that are applicable.*

#### Demographics

Age: \_\_\_\_\_

Gender: \_\_\_\_\_

Household income/company revenues: \_\_\_\_\_

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Geography: \_\_\_\_\_

Years in business/profession: \_\_\_\_\_

Political affiliation: \_\_\_\_\_

Hobbies/special interests: \_\_\_\_\_

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Other: \_\_\_\_\_

#### History with your association

Past purchase history: \_\_\_\_\_

Events attended: \_\_\_\_\_

Years as a member: \_\_\_\_\_

Volunteer positions: \_\_\_\_\_

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Other: \_\_\_\_\_

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#### Online behaviors

Web pages visited: \_\_\_\_\_

Articles or e-books downloaded: \_\_\_\_\_

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Email opens: \_\_\_\_\_

Email clicks: \_\_\_\_\_

Other: \_\_\_\_\_

### Primary Audience #2:

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*Fill in all that are applicable.*

#### Demographics

Age: \_\_\_\_\_

Gender: \_\_\_\_\_

Household income/company revenues: \_\_\_\_\_

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Geography: \_\_\_\_\_

Years in business/profession: \_\_\_\_\_

Political affiliation: \_\_\_\_\_

Hobbies/special interests: \_\_\_\_\_

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Other: \_\_\_\_\_

#### History with your association

Past purchase history: \_\_\_\_\_

Events attended: \_\_\_\_\_

Years as a member: \_\_\_\_\_

Volunteer positions: \_\_\_\_\_

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Other: \_\_\_\_\_

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#### Online behaviors

Web pages visited: \_\_\_\_\_

Articles or e-books downloaded: \_\_\_\_\_

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Email opens: \_\_\_\_\_

Email clicks: \_\_\_\_\_

Other: \_\_\_\_\_

## C. Focus on Your Value

What is your association's vision statement: \_\_\_\_\_

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What is your association's mission statement: \_\_\_\_\_

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What is your association's value proposition: \_\_\_\_\_

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### 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: \_\_\_\_\_

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attending an event put on by your association: \_\_\_\_\_

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buying a product from your association: \_\_\_\_\_

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getting a certification from your association: \_\_\_\_\_

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## D. Determine Your Channels and Formats

What channels/platforms does your association CURRENTLY use?

*Check all that apply.*

### INTERNET MARKETING

- Website
- Search engine optimization
- Retargeting
- Newsletter
- Live chat
- Podcast
- Whitepapers
- Webinars
- Blogging
- Chatbots
- Augmented/virtual reality

### SOCIAL MEDIA CHANNELS

- Facebook page
- Facebook groups
- Facebook ads
- LinkedIn page
- LinkedIn groups
- LinkedIn ads
- Google My Business
- YouTube channel
- Instagram page
- Instagram ads
- Twitter page
- Twitter ads
- Pinterest page
- Pinterest ads
- Live video
- Influencers

### PHYSICAL MARKETING

- Exterior signage
- Digital signage
- Interactive signs
- Customer loyalty
- Giveaways
- Promotions
- Brochures
- Packaging
- Free consultations

### PAID ADVERTISING

- Podcast ads
- Affiliate marketing
- Billboards
- Mailers
- Print advertising
- Radio advertising
- Social advertising
- TV advertising

### PUBLIC RELATIONS

- Press releases
- Media interviews
- Sponsorships
- Speaking events
- Conferences
- Host event

Out of the channels/  
platforms you currently use,  
which ones work best?

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Out of the channels/  
platforms you currently use,  
which ones work the least?

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What formats does your association CURRENTLY use?

*Check all that apply.*

**AWARENESS/INTEREST**

- Blog posts
- Emails
- Infographics
- Podcasts
- Newsletters
- e-Books
- Cartoons/illustrations
- FAQ sheets
- Webinars
- Templates
- Videos
- Guides
- Toolkits
- Vlogs
- Interviews
- Presentations
- Quizzes
- Research articles
- Annual reports
- Whitepapers
- Surveys
- Timelines

**CONSIDERATION/DECISION**

- Tutorials
- Product reviews
- Product demos
- Data sheets
- Free trials
- Testimonials
- Stories
- Case studies

Out of the formats you currently use, which ones work best?

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Out of the formats you currently use, which ones work the least? \_\_\_\_\_

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What formats does your association want to TRY this fiscal year?

*Check all that apply.*

**AWARENESS/INTEREST**

- Blog posts
- Emails
- Infographics
- Podcasts
- Newsletters
- e-Books
- Cartoons/illustrations
- FAQ sheets
- Webinars
- Templates
- Videos
- Guides
- Toolkits
- Vlogs
- Interviews
- Presentations
- Quizzes
- Research articles
- Annual reports
- Whitepapers
- Surveys
- Timelines

**CONSIDERATION/DECISION**

- Tutorials
- Product reviews
- Product demos
- Data sheets
- Free trials
- Testimonials
- Stories
- Case studies

Out of the formats you want your association to try this fiscal year, list out past content you could re-purpose into this format:

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