MARKETING PLAN FORMAT
MAR 4824
Marketing Management Problems
Dr. Braunsberger

PLEASE DO NOT STAPLE OR BIND YOUR MARKETING PLAN. The use of a binder clip is sufficient.

Oral Presentation

This project will have to be presented to class AND the representatives (i.e., your clients) of the Nonprofit Organizations we will be working with this semester. Please remember that you need to supply copies of the **master slides** of your presentation (two slides per page) to your client and the instructor. A team member has to be present and share equally in the presentation to earn a grade for this assignment.

Written Project

Each team is also required to submit the report in writing. Grammar, spelling and neatness will be considered in evaluating the written report. The written project should be typed (using a word processing package), single-spaced, 10-12 CPI, and approximately 20 to 30 pages in length (excluding table of contents, exhibits, appendices and bibliography). The written analysis is due on the day of the presentation.

Overall Project

It is instrumental to work with your client throughout the semester. Developing a good working relationship with your client will give you the needed guidance and point you into the right direction. Successful interaction with your client will also help prepare you for future jobs. Keep in mind that your clients have been working for their respective nonprofits for a long time and are very familiar with the organization and the environment it faces. They are familiar with their current target markets and know which strategies are unlikely to work. Also, at the end of the semester each client will be asked to evaluate his/her student team in terms of professionalism, communication skills, quality of communication throughout the semester (did you stay in touch with your client and did you get the input and approval of your client before you did primary research and decided on major steps in the marketing plan?). Each client will also be asked to evaluate the **usefulness of the respective marketing plan**. These evaluations will impact your **final grade** of the marketing plan.

You are required to conduct both secondary (search secondary sources) and primary research (interview customers). Please note that when conducting primary research you will have to collect both qualitative (i.e., personal interviews and/or focus group interviews) and quantitative (i.e., survey of at least 50 respondents who are representative of your target population of interest) data.

I. Cover Page

The cover page should include the name of your project, the name of the nonprofit organization, names of team members, course title and number, date, and name of instructor.

II. Executive Summary

The Executive Summary is a synopsis of the overall marketing plan with an outline that conveys the main thrust of the marketing strategy and its execution. The purpose is to provide an overview of the major aspects of the plan. In industry, this is often the only part of the marketing plan read by your manager and has to be a stand-alone sales tool. That is, **managers can quickly identify the key issues; sales projections (if applicable); targeted changes in consumer knowledge, beliefs, and behavior; costs; time lines; and know the expected results. That means that you need to provide a summary of each part of the marketing plan, including all important numbers!** <u>Using the titles and subtitles from your paper in this summary is an easy way to organize the summary and to increase its readability.</u>

Make sure you place the Executive Summary before your Table of Contents. The pages are numbered using Roman numbers (i, ii, iii, iv, etc.).

III. Table of Contents

Include titles, subtitles, appendices, figures, tables, etc., with page numbers (use Roman numbers as page numbers, do not include the table of contents in the table of contents).

IV. Product Statement

In this section you are to describe the nonprofit organization and the product (i.e., the charge given to you by the nonprofit – usually persuading the target audience to either accept, change, abandon or reject a specific behavior, but can also include to provide knowledge to the target audience or to change its belief system(s) about certain issues) that is going to be the focus of interest for your marketing plan. For example, if your client is The Ocean Conservancy (TOC), you need to provide background information on the organization (i.e., what is it, what does it do, history, has it been successful in what it is doing, etc.). If the charge you have received from TOC is to get boaters involved in "Coastal Cleanup Day," you need to describe what "Coastal Cleanup Day" is, how long has it been around, how successful has it been, who the target audience currently is, whether boaters have ever been target (i.e., give a detailed description, history, etc.). Be specific, detail-oriented, and do not assume that the reader is familiar with the nonprofit and product.

The first page of your product statement is page 1 of your marketing plan (i.e., start using Arabic numbers).

V. Situation Analysis

A Situation Analysis may also be known as an **Environmental Analysis**. Conduct an environmental analysis including the external environment, customer environment, and internal organizational environment.

A. External Environment Analysis

In this section you are to identify/describe all external forces for change that might affect the nonprofit organization, its future, and the future of its industry. Identify the external realities upon which your plan will be based. What are the competitive, technological, economic, political/legal/regulatory, societal/lifestyle/cultural, market, buyer behavior, channel of distribution, and other industry trends that translate into external opportunities and threats? Make sure you explicitly state how each of these forces can impact your nonprofit organization, your charge, and the outcomes you wish to accomplish. That is, do not just list these forces; relate them to the task at hand.

Please keep in mind that tables and figures cannot stand alone in any marketing plan. In other words, if you want to use tables and figures use them as support tools to illustrate the points you are trying to make in your written text.

1. Industry Analysis: What is the current situation in the industry? This description includes the size of the particular nonprofit industry, trends the industry has been experiencing, industry outlook (expanding, stagnant, contracting), success factors and failures of the industry, etc.

2. Competitive Analysis:

a. Competitive Forces

There are four types of **competitive forces**. **Brand** competitors offer similar products with similar benefits and prices (i.e., monetary cost, time, effort, etc.), and serve/target the same customers. **Product** competitors offer products that compete in the same product class but have different features, benefits and price. **Generic** competitors offer products that satisfy the same need or solve the problem but in a different way. **Total**

budget competitors seek the limited financial resources of the same customers.

For example, assume that the nonprofit organization in question is the US Fish and Wildlife Service and your charge is to come up with a marketing plan that focuses on the protection of the Florida Panther. In your Product Statement you will have already talked about the **Florida Panther National Wildlife Refuge**, which is the part of the US Fish and Wildlife Service responsible for protection efforts. **Brand** competitors in this case would be The Florida Panther Society, Inc., Florida Panther Net, and other organization specifically geared to save the Florida Panther. This also includes organizations that have a subdivision in charge of saving the Florida Panther, e.g., the HSUS. **Product** competitors include the Defenders of Wildlife, Animal Welfare Institute, International Wildlife Coalition Inc., and other organization which are working to help animals in general. **Generic** competitors of the Florida Panther National Wildlife Refuge include Florida Defenders of the Environment, the Conservancy of Southwest Florida, and other organizations that focus more on the environment and animal habitats than the animals themselves. **Total budget** competitors would be all nonprofit organizations that compete for a consumer's budget in terms of money, time, effort, etc., and include such organizations as the Red Cross, World Vision, etc.

When discussing the competitive forces, you need to focus on the nonprofit's brand and product competitors and describe these competitors in more detail. How big are they? What is their market share (in comparison to that of your nonprofit)? What are their strengths and weaknesses? Why (how) do they pose a threat to your chosen company? What attracts consumers to their products? A detailed description of these competitors will aid your SWOT Analysis, the Issues Analysis, and will give you ideas about target market and implementation.

b. Competing Behaviors

In social marketing the focus generally is on selling a behavior, i.e., you are trying to persuade your target audience to either accept, change, abandon or reject a certain behavior (i.e., your charge). Therefore, in order to assess how difficult this is likely to be, you need to identify, examine and describe the current or preferred behavior of the target market and the perceived benefits the target market associates with that behavior. In other words, you need to identity, examine and describe the behavior your target market would prefer over the one you are promoting and you also need to investigate why this is the case. Keep in mind that perceptions in your target market will be that giving up the current or preferred behavior is a cost incurred when adopting the new behavior you are trying to promote (you will analyze this later on when discussing the pricing issues concerning your product). Will you be able to offer benefits that are equal to or (hopefully) exceed these perceived costs?

3. Technology not only refers to the new types of products such as computers and digital products, but it also means the processes by which tasks are accomplished. This section examines how changes in technology impact customers' and employees' lives and how marketers respond to their needs. For example, if you were preparing a marketing plan for The Tampa Bay Estuary Program on responsible fishing, computers and digital products of interest would probably include GPS units used by boaters to locate preferred fishing sites, whereas technology that impacts process issues would include the potential use of the Internet to get information to the target audience.

4. The ***Economic Situation*** looks at the stability and growth of the market in which the firm operates, i.e., country, region, state, or local area. This section may examine inflation, employment and income levels, taxes, and consumer confidence as they impact the nonprofit organization and the charge of the marketing plan.

5. Political Trends, Legal Trends, and Regulatory Forces: This section examines how governmental regulations may affect the organization and its charge. It also looks at the organization's relationships with elected officials. Is the current administration, Congress, legislature, county or city government likely to sponsor laws or regulatory changes that will affect the nonprofit and its charge, either favorably or negatively? Do recent court decisions have an impact on the operating environment; do they impact how you will have to carry out your charge?

6. Cultural Trends may have a profound impact on how customers respond to the nonprofit's offering. Examples of **Lifestyle Trends** include less leisure time, cocooning, focus on health, exercise and nutrition, and less concern with cleanliness. **Demographic Trends** include aging baby boomers, new boomers (GenY), a rise in single person and single parent households, more women who work, and increasing population diversity. Some **Changes in Cultural Values** include less conspicuous consumption, value orientation (quality/price), environmental concern, less tolerance of public smoking, more tolerance of varying lifestyles, and giving back to the community.

B. Customer Environment Analysis

This section should examine the **current situation** in respect to the needs of the target market, expected changes in those needs, and how the firm presently meets those needs. Make sure you answer all of the following questions. Please keep in mind that this section focuses on the **current target market of the respective nonprofit organization, NOT the market you propose to target with this marketing plan.** At this point, you are still examining the status quo the organization faces, which should aid your decision making in the remainder of the marketing plan. For example, if the nonprofit in question is TOC, and the charge is to get local area boaters involved in Coastal Cleanup Day, the focus in this section of the marketing plan would be on those target markets that currently participate in the Coastal Cleanup Day (NOT local area boaters) and what can be learned from those targets. Please use the format presented below for enhanced readability.

1. Who? Current and potential customers of the same customer group? Demographics, psychographics, geographics. Is the buyer the user? Who influences the purchasing decision?
2. How many? How many customers does the organization serve? What is the capacity to serve?
3. Where? Where are products purchased? Where do customers participate? Types of intermediaries? Influence of electronic commerce? Non-store buying—Home Shopping Network, catalogs, Internet?
4. When? When are the products bought/acquired? Frequency of purchasing? Do promotional events affect purchase? How do differences in physical or social environment, time demands, or purchase task affect buying?
5. Why and How? What are the basic need-satisfying benefits? Does a competitor's product fit a need this product/service does not? Changes in customer's needs? How do the customers pay? Cash, Credit?
6. Why Non-customers? Needs not meet. No fit for lifestyle/image. Price. High switching costs. Competition's product is better. Poor distribution. Does not know about the product.

C. Internal Environment Analysis

This section should identify/describe relevant internal aspects of the nonprofit organization that help identify strengths and weaknesses. This requires the identification and analysis of the organization's past financial performance (sales, market share, profitability, etc.), marketing strategies (target market and positioning/image), marketing goals, objectives, and past performance, and marketing programs (advertising /promotion effectiveness, product/service offer, distribution effectiveness and channel programs, pricing, sales force effectiveness, sales strategy and programs, public relations/publicity, marketing research /intelligence gathering efforts etc.) Additionally, the report may need to examine such things as production capacity, technical capabilities, management/leadership, organizational structure and culture, level of available resources and skills, financial stability, number and education of volunteers, number of donors and amount of donations, and other relevant characteristics of the nonprofit that help develop a complete list of strengths and weaknesses. It is important to focus on how the organization is perceived by the market and its own customers as the main determinant of market-relevant strengths.

VI. SWOT Analysis

A thorough Situation Analysis is the foundation for a SWOT Analysis. Develop statements of the company's internal strengths and weaknesses, and external opportunities and threats. If there is any question as to whether a fact or issue is external (these lead to opportunity and threat statements) or internal (these lead to strength and weakness statements), ask this key question, "Would this issue exist if the organization did not exist?" If the answer is yes, then the issue should be classified as external.

Note: Remember that alternative marketing strategies and tactics are not opportunities. Opportunities and threats exist independently of the firm. Strategies and tactics are what the firm intends to do about its opportunities and threats relative to its own strengths and weaknesses.

The SWOT will play a critical role (along with an in-depth understanding of target market needs/preferences and competition) in the development of goals, objectives, and marketing strategies and programs. Key strengths need to be matched to opportunities and converted to capabilities that help serve customer needs better and lead to competitive advantage. Goals, strategies and program ideas stem from an attempt to convert weaknesses into strengths and threats into opportunities. Some alternatives will also come from thinking about how to minimize the repercussions of weaknesses and threats that cannot be converted, and/or how to avoid them altogether.

Please use the SWOT tables for the SWOT analysis, and remember, the format for this particular SWOT Analysis is different from the format we use for the case analyses. Since all handouts are posted on Blackboard, feel free to download the table format and use it for your marketing plan.

Please make sure to hand in the tables with the assignment "Marketing Plan 2" as well as with your final marketing plan.

VII. Primary Research

Each group will have to conduct personal interviews and/or focus group interviews with individuals who are representative of its proposed target market. The purpose of conducting these interviews is to make sure that you are on the right track with your marketing plan. One of the biggest fallacies in marketing is often that a manager "thinks s/he knows what members of the target market know, believe, and do." The development of a useable marketing plan, however, has to be based on consumer input.

Once you have completed your primary research efforts, you will need to revisit your situation analysis and your SWOT analysis. It is very likely that you overlooked specific factors that need to be added to these analyses.

A. Qualitative Research: Personal Interviews and/or Focus Group Interviews

Qualitative research is a first step to make sure that the issues you have identified are issues as perceived by your target audience. Qualitative research will give you insights into what consumer actually think, know, belief. This type of research will also allow you to investigate how consumers describe their behavior and why they do what they do. It further allows you to gain information on how difficult it would be to get consumers to accept new behaviors or to change, abandon or reject current behaviors; to learn which communication methods would be most productive; and which incentives most successful with a specific consumer group. Finally, the results of qualitative research provide input for the development of your consumer survey.

For this part you will have to develop a guide to be used by the moderator. You will then have to conduct the interviews. Keep in mind that you need a minimum of ten (10) consumers representative of your proposed (or assigned) target market to participate in these interviews. Finally, you will need to report the results.

Make sure to have the moderator guide approved by both your client and your instructor BEFORE you conduct any type of qualitative research.

B. Quantitative Research: Consumer Survey

For this step you will have to collect data from a minimum of 50 respondents who are representative of your target market. Use the results of the environmental analysis, the SWOT analysis, the personal interviews/focus group interviews, and suggestions from your client as input for the development of this survey.

The purpose of the survey is to (1) verify the results of the qualitative study, (2) give you concrete ideas about your target market and why members of this market perform/avoid certain behaviors, (3) when and how to best reach your target market, (4) what incentives or which type of persuasive messages are most likely to lead to the desired behaviors, etc.

Make sure to have the survey approved by both your client and your instructor BEFORE you conduct any type of qualitative research.

VIII. Issues Analysis

The SWOT Analysis and the outcome of the Primary Research efforts are the basis for the Issues Analysis. Here the **primary focus** should be on the charge given by the client. What are the most important issues and decisions that the organization is likely to face when trying to “sell the behavior in question?” Further, if the previous research steps (situation analysis, SWOT analysis, and primary research efforts) have shown that previous outreach efforts were unsuccessful (and why), you should include the lessons to be learned as issues. In addition, you might have learned that the target customers have little to no information about the charge at hand, or hold beliefs that would counteract any possible action plans. For example, if you were developing a marketing plan for the University of Florida, Institute of Food and Agricultural Sciences, Florida Yards and Neighborhoods Program, issues would address problems likely to be faced when trying to get local neighborhoods to accept the promoted behaviors, namely placing the right plant in the right place; using water efficiently; fertilize appropriately; mulch; attract wildlife; control yard pests responsibly; recycle; reduce storm water runoff, protect the waterfront (see http://hort.ifas.ufl.edu/fyn/). You might have found out that a lot of homeowners know little about the “desirable behaviors” or hold belief systems that make any type of outreach program difficult to implement. If you also have learned that previous outreach programs have failed because homeowners insist on a carpet of lush, green St. Augustine, you include the lessons you have learned from those failed programs. May be the way the organization addressed the perceived benefits from current behaviors was faulty, maybe the target audience was not able to identify the benefits of the proposed behaviors, etc.

In general, Issues can include, but are not limited to (the issues depend on the charge of the respective marketing plan and are likely to differ from plan to plan):

- Should the nonprofit focus on the charge in question?
- What rate of growth is necessary and sustainable?
- Does the organization need to increase promotion to thwart the competition or to successfully reach its target market?
- Does the organization need to develop new outreach efforts to reach the identified target market?
- What would be the most promising way of communicating with the target market?
- Does the organization need to increase the target market’s knowledge base?
- Does the nonprofit need to address/change the target market’s belief systems?
- Does the nonprofit need to develop persuasive messages tailored to accept, change, abandon or reject targeted behaviors?
- Does the organization need to work on its reputation?
- Is the nonprofit’s current distribution in order?

- Should the nonprofit review its pricing strategy?
- Does the nonprofit anticipate any major competitive attacks in its current markets?
- Does the organization need to recruit more volunteers?
- Does the organization have a problem with controlling and/or motivating its volunteers?
- Does the nonprofit need to attract more donors and/or donations?

Note: Be realistic when proposing issues. For example, suggesting that the investment of funds is an issue is not appropriate for the marketing plan. First, it has nothing to do with the charge at hand; second you are unlikely to have enough information to address this issue in the following sections (i.e., goals, objectives, and implementation). Also, make sure that you get your client's input on this section to make sure that you stay on track.

IX. Goals and Objectives

Both goals and objectives need to be driven by the Issues Analysis.

Establish corporate goals (qualitative statements of desired general accomplishments that are indicative of the direction and priorities of the nonprofit, an outcome that the nonprofit hopes to accomplish, e.g., to improve customer satisfaction and loyalty, increase consumer knowledge, change consumer beliefs, persuade the target audience to accept/change/abandon/reject certain behaviors, have the most-recognized and effective advertising campaign in the industry, improve service quality, have lower prices than all competitors, increase market share, produce the most loyal volunteers/donors in the industry).

Set specific measurable corporate quantitative objectives, percentage change in the knowledge base, belief system, the targeted behavior; targeted dollar amount of fundraising and/or donations; number of volunteers to be attracted; targeted number of donors; market share; etc. That is, you need to express the goals you have outlined above in quantitative (numerical) terms, and you also need to place them within a time frame. In other words, the objectives are driven by the goals you outlined above. Please avoid listing objectives that have nothing to do with the identified goals.

Note: If you are dealing with a new product (i.e., charge), please do not express objectives for the first year in percentage terms. In other words, stating that you would like to increase awareness by 5% for a new product does not make sense, because a new product will start out with a market share (or awareness) of zero and 5% of zero is still zero. In such a case, please phrase your objectives differently (e.g., the objective is to educate 10% of the target market about your charge within the next 6 months, or to get 5% of your target market to belief that it is necessary to protect the Florida Panther).

The format for this section should look as follows:

Goal 1
- Objective 1
- Objective 2 (if applicable)
- Etc.

Goal 2
- Objective 1
- Objective 2 (if applicable)
- Etc.

Goal 3
- Objective 1
- Objective 2 (if applicable)
- Etc.

Goal 4
- Objective 1
- Objective 2 (if applicable)
- Etc.

Etc.

X. Marketing Strategies

Marketing strategies encompass recommended positioning, competitive differentiation, and customer value strategy. This includes a description of target market selections (primary and secondary), intended image/position in the market, and the value proposition.

A. Target Market Definition

The process of making target market selections is one of the most important decisions an organization can make. Most organizations segment the entire population into groups with homogeneous needs. For a market segment to be viable it must be **measurable, meaningful**, and **marketable**. A segment is **measurable** if its size can be determined, its purchasing power can be estimated, and other characteristics can be identified. It may be difficult to segment on the basis of social class but easy to segment along income levels. A segment is **meaningful** when it is large enough to have sufficient sales and growth potential to serve in the long run. A **marketable** segment is one that may be reached and served efficiently. In general, an organization wishes to serve the largest possible homogeneous group that also seems to be most likely to be persuaded to change, accept, abandon or reject the behavior in question. However, at times your client will specify which consumer group to target (e.g., TOC wants to include boaters in International Coastal Cleanup Day).

Bases for segmenting **consumer markets** include geographic, demographic, psychographic, and behavioral characteristics. **Demographic** segmentation includes the characteristics of age, family size, family life cycle, gender, income, occupation, education, religion, race, generation, nationality, and social class. **Benefit** segmentation describes why consumers buy a product (e.g., makes me feel good, makes me feel useful, etc.). **Psychographic** segmentation encompasses lifestyle (e.g., outdoors, athletic), and personality (e.g., compulsive, gregarious). **Behavioral** characteristics include occasion (e.g., Valentine's Day, birthday), usage rate (e.g., light, medium or heavy users), or attitude (loyalty).

Note: You do not have to use all of the above listed bases for segmenting consumer markets. However, demographic segmentation and benefit segmentation will always have to be used. Please follow the instructions below:

1. ***Primary Target Market***

   - Describe the primary target market in demographic terms (use the descriptors that are most useful in terms of your charge).

   - Describe the primary target market using benefits sought by that market.

   - Describe the primary target market using either one of the following bases: geographic, psychographic, sought, or usage (depends on your target and your charge).

   - Estimate the number of customers in your primary target market.

   - Justify the choice of your primary target market (if applicable).

B. Strategy Statement

1. **Image/Market Position**

   Positioning is the act of designing the offering and its image so that both occupy a meaningful and distinct competitive position in the minds of the target market.
   What is the intended image you wish the product to portray? What is the position you wish the product to obtain?

2. **Value Proposition**

Why should customers buy from the company instead of its competitors? What does the company have to offer to its customers that outperforms its competitors' products?

XI. Marketing Implementation: Action Plans and Marketing Mix

The action plans and the marketing mix are related. That is, the action plans contain a complete description of a marketing program, including its goals and objectives (as previously outlined in the section on ***Goals and Objectives)***, marketing mix activities, program evaluation mechanisms and measurements, budget and timing considerations, and quantitative assessments. A complete description of these final dimensions follows. Please make sure to stick to the attached format for action plan outlines.

Before you begin working on the action plans, make sure to discuss the total budget amount with your client. These are nonprofit agencies and you probably will be on a limited budget. Do not develop action plans the nonprofit cannot afford to implement!

State for each action plan:

1. The goal(s) and objective(s) for the action plan.

2. Target market at which this action plan is aimed.

3. The marketing mix activities needed to implement the action plan.

- Product strategy and programs that require consideration of such things as brand name, product features /benefits, differentiation from competition, relationship to delivering value, logo, package design/labeling, complementary products/services, elements of customer service strategy and programs, etc. Also, this is where the service concept, service delivery system, tangibles, customer contact employees, etc., need to be addressed. Depending on the charge of your marketing plan some of the above may not apply.

- Price strategy and programs that require consideration of such things as pricing objectives and relationship to delivering value. Keep in mind that pricing is not restricted to monetary concerns. Costs your customers incur include the cost of giving up the perceived benefits that are provided by current behaviors (those you are trying to change). Customers are likely to compare the perceived benefits of the current behavior to the perceived benefits of the behavior the customer is asked to accept. In other words, customers are likely to perform a cost-benefit analysis. That means that customers must perceive the new behavior to have benefits that are equal to or exceed the perceived costs of giving up current behaviors.

When considering pricing issues, also include costs customers are likely to incur in terms of time, effort, and energy. Also consider psychological costs (e.g., embarrassment, fear, rejection, etc.) and losses (e.g., aesthetics, familiarity, etc.), and physical discomfort or loss of pleasure (see Kotler, Roberto and Lee, 2002).

- (Place) distribution strategy and programs that require consideration of such things as the selection, motivation, and evaluation of channel partners (if applicable).

  This is also the place to describe any direct marketing programs (mail, telemarketing, catalogs, Internet, etc.) and other accessibility issues (e.g., number of boating ramps in a local area, number of onshore fishing sites).

- Promotional activities
  - Advertising strategy and programs that require consideration of such things as advertising message (what will be said, unique selling points, benefits to be stressed, value story, points of differentiation etc.), creative style (settings, characterization, humor or not, testimonials, etc.), media mix, media schedule, etc.

  - Public relations/publicity strategy and programs that require consideration of such things as how to get press coverage, get the company/brand name and story out to the public, event oriented marketing, etc.

  - Sales promotion strategy and programs that require consideration of such things as contests, sweepstakes, event tie-ins, coupons, premiums (T shirts, hats, key chains, cup holders, etc.), trade shows, consumer fairs, etc.

  - Sales force strategy and programs that require consideration of such things as size of the sales force, sales force organization (geographic territory, customer type based, product based or some combination, salesperson characteristics and skills to recruit and train toward, compensation, motivation, etc.

    This section will describe selling strategy in terms of sales call emphasis, selling strategy and tactics (what should sales people be doing and saying).

Note: In the nonprofit world, sales people are generally not called sales people, but are referred to as Outreach Coordinator, Volunteer Coordinator, etc.

- Other marketing programs that require consideration of methods to systematically listen to the customer, monitor customer satisfaction/loyalty, monitor competition, and become aware of trends that might impact the business. This requires some type of specific intelligence/information gathering plan.

4. Describe the evaluation and measurement procedures to be used to monitor overall performance of the action plan, including quantitative measures and allowable time frames.

5. Elaborate the specifics of plan implementation and quantitative projections. This includes people responsible for programs, budgets, other resources needed, target completion dates, timetables, etc. This requires a consideration of who does what, when, and for how much. Quantitative assessment includes projections of behavioral changes (in percentage or total number of customers), projections of fundraising and/or donations (in $) and market share, costs, etc.

Format: Action Plan Outline (please use a table format, such as in the example given below)

Title: The title of the action plan should describe the content.
Goal and Objective: What will this action plan accomplish? Which of the goals and objectives does this plan support? Here you need to go back to your ***Goals and Objectives*** section and make sure you develop at least one action plan for each of the goals and objectives you have previously outlined. In other words, you do not need to have seven goals in your ***Goals and Objectives*** section, a lesser number is acceptable if you develop more than one action plan for specific goals and objectives.
Target Market: At which market is this action plan aimed? Since you only have one target market, this will always be the primary target market you have outlined above. Do not include any "new" target markets here.
Description of the Action Plan: What are the steps being taken to accomplish the objective? This section refers to the ***marketing mix*** activities deemed best to accomplish the objective. A rich, detailed description is required.
Who: Who is responsible for carrying out this program? (Name of person or job title)
Timing: When will the program take place? (Start and stop dates)
Budget and Estimated Profitability and/or Expected Behavioral Change: How much will the program cost? Give details of the budgetary items for this action plan. Also, you need to include estimated profits and/or expected behavioral changes.
Measurement: How will the effectiveness of the action plan be measured? How will the company know that it was successful? Measurement of effectiveness is always **quantitative**, and may include (depends on your objective) percentage of behavioral change that is acceptable, dollar sales, dollar amount of fund raising/donations, expected customer satisfaction, advertising effectiveness measures, etc., in addition to a time line (monthly, quarterly, annually, etc.).

You are to develop seven (7) plans, each of which is worth a maximum of 5 points.

XII. Marketing Budget

Please use the objective and task method and rank the action plans in order of importance. You also need to defend the budget request. The defense should be a strong persuasive argument with the rationale clearly understood by the reader. Make sure that you include the behavioral percentage change or profit potential as part of your justification. The defense should be for the total budget amount requested, not by individual action plans.

XIII. What We Learned

What did the process of writing a marketing plan teach you? What hints and tips can you give future students who may review your project?

XIV. Bibliography

A sizeable bibliography is expected (at least 15 sources). Further, please make sure that you use credible sources only. If you take shortcuts on the number and quality of your sources, you will end up with a poor quality marketing plan that will be of no use to your client. If that is the case, you will lose a minimum of 90 points (in addition to any other points you might fail to earn on any of the other sections of your marketing plan).

Also, it is important that you reference your sources throughout the text of your marketing plan. There are two ways of doing this. First, you could use footnotes. Second, you could use the following format:

"As a result, telephone interviewers often do not even get a chance to explain that they are conducting a survey (Council for Marketing and Opinion Research, 2003), and response rates have steadily declined (Keeter et al., 2000) to reported lows of 7% (Council for Marketing and Opinion Research, 2003). This decrease presents a problem because not only does it increase the cost of conducting telephone surveys, but it also leads to questions concerning the generalizability of the results (Struebbe, Kernan and Grogan, 1986; Tuckel and O'Neill, 2002)."

The Marketing Plan should use third person business writing. No "we, our, you."
Do not use contractions in business writing! No "it's," "should've," "thru," etc.