

WORKSHEET 4

Marketing Plan Template

Separate marketing plans should be developed for each product/service to be promoted or for each product/service family to be promoted. The marketing plan can be a few pages, with each section containing a couple of paragraphs, or each section can have a few pages.

TABLE OF CONTENTS

This section is recommended to ensure ease of review.

EXECUTIVE SUMMARY

This section presents a summary of the proposed plan for quick skimming by management.

SECTION I

Introduction (See chapter 4.)

Describe the existing or envisioned service in detail and explain how it fits into the market:

1. What are the benefits of the service?

a. What is the core benefit being offered? (What is the customer really seeking? What need is the service really satisfying?)

b. What benefits accrue to the community/campus when members of the target market use this service?

2. How are the characteristics of the service managed?

a. What tangible item(s) does the customer see, feel, hear, touch, or receive as a result of receiving this service?

b. What library personnel does the customer come in contact with to obtain this service? What technology does the staff person use to provide this service? How does the service function?

WORKSHEET 4
Marketing Plan Template *(cont.)*

c. What steps are being taken to decrease the variability and ensure consistent quality when this service is delivered to the customer?

d. What measures are being taken to balance supply and demand for the service?

e. What do customers have to do or know to have the best “experience” in seeking the benefits of the service?

3. What resources are needed to deliver the service?

a. What existing or additional hardware, software, electronic databases, print sources, etc., will be used or must be purchased to deliver the service? What staff reallocations or hiring is required?

b. What partnerships with other organizations should be forged to supplement or complement capabilities? *(Identify areas to be complemented or supplemented here. Identify potential partners to target and strategies in Sections VI and VII, below.)*

4. Where does the service fall in the service family hierarchy?

5. What stage of the life cycle is the service in?

WORKSHEET 4

Marketing Plan Template *(cont.)*

6. What is the service description for your service?

SECTION II

Target Market Description *(See chapter 5.)*

(Information about the characteristics of your target market may be obtained from a strategic plan or from other worksheets.)

Basic Assumptions *(Record basic assumptions and/or indicate notations used to show that answers to questions 1–10 are assumptions, e.g., with *.)*

1. What are the demographics of the target market?

What is the size (how many people in total)? _____

Age range: _____ Gender: Male _____ Female _____ Total _____

Ethnicities: _____

Languages spoken: _____

Income range: _____

Education level: _____

Other(s): _____

What are the significant demographic trends? _____

2. What are the geographic demographics that have marketing implications for your product/service?

What is the area's population? _____

What is the population growth pattern (stable, negative, positive)? _____

How many public and private K–12 schools are in the community? _____

What section of the country is the library and its target markets located (North, South, East, West)? _____

What is the population density (urban, suburban, rural)? _____

What type of media outlets are available (local, regional, national)? _____

Other(s): _____

WORKSHEET 4

Marketing Plan Template *(cont.)*

3. How do members of this target market use the library (behavioral data)?
(Categories can overlap. Estimates could exceed 100% of total market size.)

How many (or what percentage):

Have library cards? _____

Regularly use the library to borrow materials? _____

Occasionally use the library to borrow materials? _____

Formerly used the library to borrow materials? _____

Would be first-time library users? _____

Use materials in the library? _____

Use reference services?

In-library: _____

Telephone: _____

Online: _____

Attend library programs? _____

May have never used the library? _____

4. On what occasions (days of weeks, specific months, holidays) would members of this target market most likely use the service?

5. What are the significant library usage trends?

6. What are the five most prominent lifestyles within your target market (psychographics)?
(Look up by ZIP code in "You Are Where You Live" — <http://www.yawyl.claritas.com>.)

Lifestyle 1: _____

Narrative description:

Lifestyle 2: _____

Narrative description:

Lifestyle 3: _____

Narrative description:

WORKSHEET 4
Marketing Plan Template *(cont.)*

Lifestyle 4: _____

Narrative description:

Lifestyle 5: _____

Narrative description:

7. What are the significant lifestyle trends?

8. What benefits of this service are valued most by members of this target market?
 What needs and wants are satisfied by the benefits of this service?

9. Why is there a demand for this service in the target market? How much demand is anticipated?

10. What are the media habits of the target market? What type (or specific outlet) of medium is viewed (e.g., conservative radio talk show; CNN on cable TV)?

<i>Medium</i>	<i>Hours/Week</i>	<i>Type (category)</i>
Television	_____	_____
Radio	_____	_____
Magazines	_____	_____
Newspapers	_____	_____

SECTION III

Current Market Situation *(See chapter 6.)*

1. Describe the competition. What alternatives can members of the target market obtain to satisfy their needs or wants? Or, what alternatives do members of the target have for spending their time?

<i>Desire Alternative</i>	<i>Assessment of competing alternative</i>
_____	_____
<i>Generic Alternative</i>	<i>Assessment of competing alternative</i>
_____	_____

WORKSHEET 4
Marketing Plan Template *(cont.)*

Form Alternative

Assessment of competing alternative

Enterprise Alternative

Assessment of competing alternative

2. Describe the library's current position in the mind of members of your target market by answering one or more of the following questions:

a. How do members of the target market currently perceive your library?

b. What is your library's image compared to the image of a provider of a competing alternative?

c. What is your library's image compared to the image of an ideal provider of a competing service?

d. What is your current positioning statement for the service?

3. Describe the place (library's outlets) where the service can be obtained:
(In narrative format, provide answers to applicable questions below.)

a. How many physical outlets (main library, branches, bookmobiles, kiosks)?

b. What are the dimensions of the physical outlets (square footage)?

c. What are the virtual outlets (telephone, website)?

WORKSHEET 4
Marketing Plan Template *(cont.)*

d. Are there barriers to use associated with your service?

e. Describe the atmospherics of the physical or virtual outlet (look, feel of exterior and interior).

f. How many librarians, support staff, and volunteers are available to deliver the service?

g. What level of customer service do you provide?

h. What special training has been given to staff to deliver the service?

i. What customer service training has been given to staff?

j. Will you need to forge partnerships to make this service available?

4. What nonmonetary or monetary price does the customer have to pay to obtain your service? What is burdensome about obtaining your service?

- a. Time (waiting time, frustration)
- b. Convenience
- c. Transportation costs: public transportation, automobile costs, gas, parking
- d. Fees
- e. Other

WORKSHEET 4
Marketing Plan Template *(cont.)*

5. What promotional techniques are being used for this product/service? How effective have the efforts been? *(See chapter 8 for a list of techniques.)*

Technique	Effective	Not effective	Not sure	Consider for promotional campaign	Comments

SECTION IV

Opportunity and Issue Analysis *(See chapter 6.)*

1. What are the main opportunities for the service? Why is it an opportunity?

<i>Opportunity</i>	<i>Why?</i>
_____	_____
_____	_____
_____	_____
_____	_____

WORKSHEET 4
Marketing Plan Template *(cont.)*

2. How will you take advantage of each opportunity?

3. What are the main issues facing this service? Why is it an issue?

<i>Issue</i>	<i>Why?</i>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

4. What do you intend to do about each issue?

SECTION V

Marketing Goals and Objectives *(See chapter 7.)*

Marketing goals are derived from the strategic directions in your strategic plan that concern facilitating exchanges between your library and your customers. Goals set out the broad destination or "endgame" for the marketing strategy. Objectives turn the goals into specific quantifiable benchmarks for measuring progress.

Some areas for goal and objective setting:

1. *Awareness*

Goal:

Objective(s):

2. *Usage*

Goal:

Objective(s):

3. *Staff knowledge and skills*

Goal:

Objective(s):

4. *Library funding*

Goal:

Objective(s):

WORKSHEET 4
Marketing Plan Template *(cont.)*

5. Other: _____
Goal: _____
Objective(s): _____

6. Other: _____
Goal: _____
Objective(s): _____

SECTION VI

Marketing Strategies *(See chapter 7.)*

1. Core Marketing Strategy:

2. Positioning Strategy:

a. What position, in the minds of your target market, will your library claim versus providers of competitive alternatives?

b. Is there a dimension on which you can claim to be the best?

c. Write your service's positioning statement.

3. Marketing Mix Strategies: How will the goals and objectives be accomplished?

a. Service (Product) Strategies:

b. Price:

c. Place (can include partnerships):

d. Partnerships:

e. Promotion:

WORKSHEET 4
Marketing Plan Template *(cont.)*

SECTION VII

Marketing Tactics / Action Plan *(see chapter 9)*

This section states what will be done, who will do it, when it will be done, and how much it will cost. The chart can also be used to monitor the implementation (status) of these tactics (actions): R (for red) indicates not on schedule, could put other tasks in jeopardy; Y (yellow) indicates a possibility that the schedule will not be met; G (green) indicates that the action is on schedule; completed actions are indicated with C.

What	Who	When		Status	How much
		Start	End	R/Y/G	
<i>Product</i>					
<i>Price</i>					
<i>Place</i>					
<i>Promotion</i>					

How will budgets be established? Which strategy will you use? Explain.

1. Affordable method _____
2. Percentage of overall budget method _____
3. Competitive-parity method _____
4. Objective-and-task method _____

WORKSHEET 4
Marketing Plan Template *(cont.)*

SECTION VIII

Implementation and Controls *(See chapter 9.)*

This section states how the plan will be monitored. You may choose to incorporate the chart developed in Section VII into your plans.

SECTION IX

Summary *(See chapter 10.)*

This section summarizes why the plan will succeed. Restate the advantages your plan for the product/service has over the competitive alternatives.

SECTION X

Appendixes

This section includes all supporting information you consider relevant.