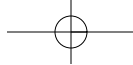


A P P E N D I X

Worksheets and Formats for the Marketing Plan

The following worksheets correspond to the preparation of your marketing plan presented in Parts II through IV of this book. Their purpose is to provide you with a strategic framework for efficiently preparing an effective, well-thought-out marketing plan. Use these worksheets to identify and compile material for each of the sections as well as for completing your marketing plan.



CHAPTER 4 SCOPE

WORKSHEET 33

Core Competencies

Company Strengths That When Combined, Form a Unique Capability

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Definition of core competency: Combination of strengths that form an overriding capability that allows you to have a differential advantage over the competition. It provides you access to a target audience by making a significant and difficult-to-duplicate contribution to the benefits customers perceive from purchasing your products or services.

Description of What You Really Do

One sentence: What is it you really do for your customers?

Key benefit to target:

Scope of Business

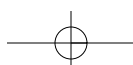
Broad users and/or purchasers target market:

Industry category in which you will compete:

Channels you will sell to and through:

Geographic markets where you will compete:

Key competitors or competitive set:



WORKSHEET 34 (Continued)

Task 2. Determine Key Industry and Company Target Market Segments

Identify Target Market Segments from Best-Performing Products in Task

First consider power segments, those target segments responsible for the greatest purchase rate of the top-performing products and purchases across multiple products in your industry category (if applicable).

List the target market description for the largest industry or company product category (based on sales volume, sales growth, and/or profitability), the second largest, third largest, and so on. Use a separate form for each target market description.

Also list target market behavior (users, purchasers, dollars/customer, and retrieval rate).

Target Segment Description 1

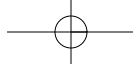
Segment accounts for _____ % of total category sales		Segment accounts for _____ % of total company sales		Percent of Penetration
CATEGORY		COMPANY		COMPANY TO CATEGORY
Growth Rate		Growth Rate		Penetration
This Year	Past 5 Years	This Year	Past 5 Years	This Year

Number of users
 Number of purchases
 Dollars per customer
 Retrieval rate

Target Segment Description 2

Segment accounts for _____ % of total category sales		Segment accounts for _____ % of total company sales		Percent of Penetration
CATEGORY		COMPANY		COMPANY TO CATEGORY
Growth Rate		Growth Rate		Penetration
This Year	Past 5 Years	This Year	Past 5 Years	This Year

Number of users
 Number of purchases
 Dollars per customer
 Retrieval rate



WORKSHEET 34 (Continued)

Task 3. Define the Primary and Secondary Target Market Segments

Target Market for Consumers: Short Term

Primary

Secondary (Where Applicable)

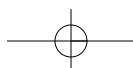
Rationale

Target Market for Consumers: Long Term

Primary

Secondary (Where Applicable)

Rationale



WORKSHEET 34 (Continued)

Task 4. Refine Your Selections

Review Your Target Selections Based on the Following

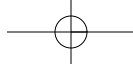
- Consistency with brand positioning
- Strong awareness
- Positive attitude toward company and its products and services

Target Segment Awareness Ratings

TARGET SEGMENT DESCRIPTION _____	Yr. 1	Yr. 2	Yr. 3	Yr. 4	Yr. 5
Company					
Leading competitor					
Leading competitor					
Leading competitor					

Target Segment Attribute Ratings Critical to Brand Positioning

TARGET SEGMENT DESCRIPTION _____	Company Ranking					Leading Competitor Ranking					Leading Competitor Ranking									
	Yr. 1	Yr. 2	Yr. 3	Yr. 4	Yr. 5	Yr. 1	Yr. 2	Yr. 3	Yr. 4	Yr. 5	Yr. 1	Yr. 2	Yr. 3	Yr. 4	Yr. 5					
Top 5 Attributes																				
1																				
2																				
3																				
4																				
5																				

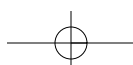
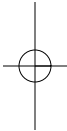
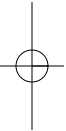


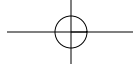
WORKSHEET 34 (Continued)

Task 5. Analyze Demand for Your Products and Services

Demand Analysis

1. Primary target market total population size _____
 2. Geographic constraints _____
 3. Average purchases per year per customer _____
 4. Total purchase per year in category _____
 5. Average dollars per purchase \$ _____
 6. Total dollar purchases in category \$ _____
 7. Your company's projected share of purchases \$ _____
 8. Additional factors and considerations _____
 9. Final demand expectations for your category \$ _____
 10. Final demand expectations for your company \$ _____
-





CHAPTER 6 POSITIONING

WORKSHEET 35

Method 1 for Finding Your Brand Promise: Positioning by Emotional Relationship

1. Develop individual profile of your highest-opportunity consumer:

Demographics:

Attitudes, opinions, and lifestyle:

2. Brainstorm and list motivators:

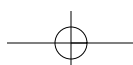
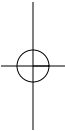
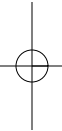
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Research and rank motivator choices with customer profile:

-
-
-

4. Identify the primary motivator:

5. Use the motivator to write a positioning strategy:



WORKSHEET 35 (Continued)

Method 2 for Finding Your Brand Promise: Positioning by Matching Matching Product Differences to the Target Market's Needs and Wants

Key Competition

- 1
- 2
- 3
- 4
- 5

Key Target Market

Differences from Competitor

- Product, store, service attributes
- New products, improvements
- Packaging, store appearance
- Branding, name, reputation
- Distribution, penetration
- Price
- Communication
- Personal selling
- Customer service
- Other

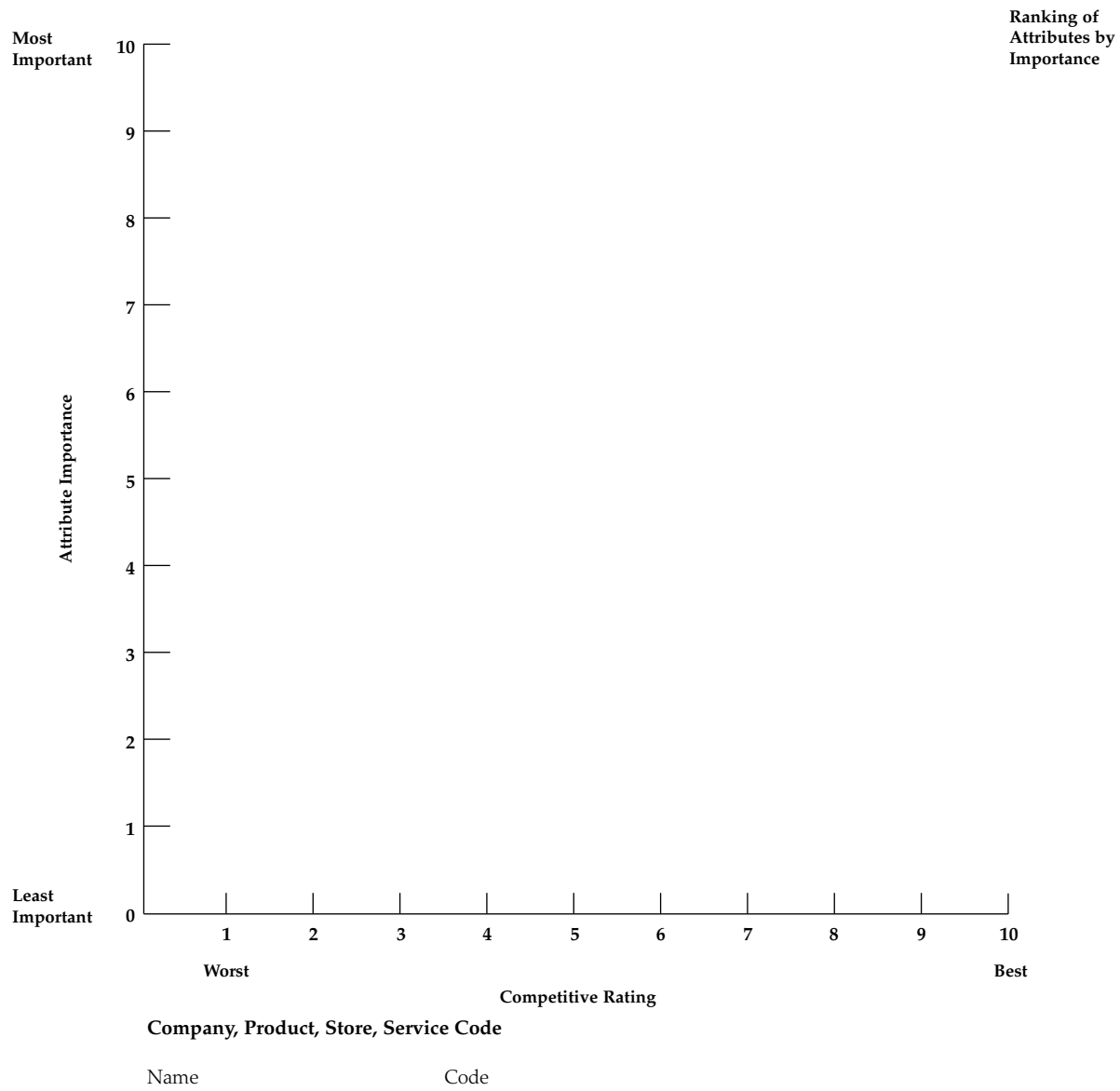
Characteristics—Needs and Wants

- What
- Where
- When
- Why (Benefit)
- How purchased or used
- How the target and its needs and wants are changing

WORKSHEET 35 (Continued)

Method 3 for Finding Your Brand Promise: Positioning by Mapping

Positioning by Mapping Attributes

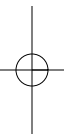
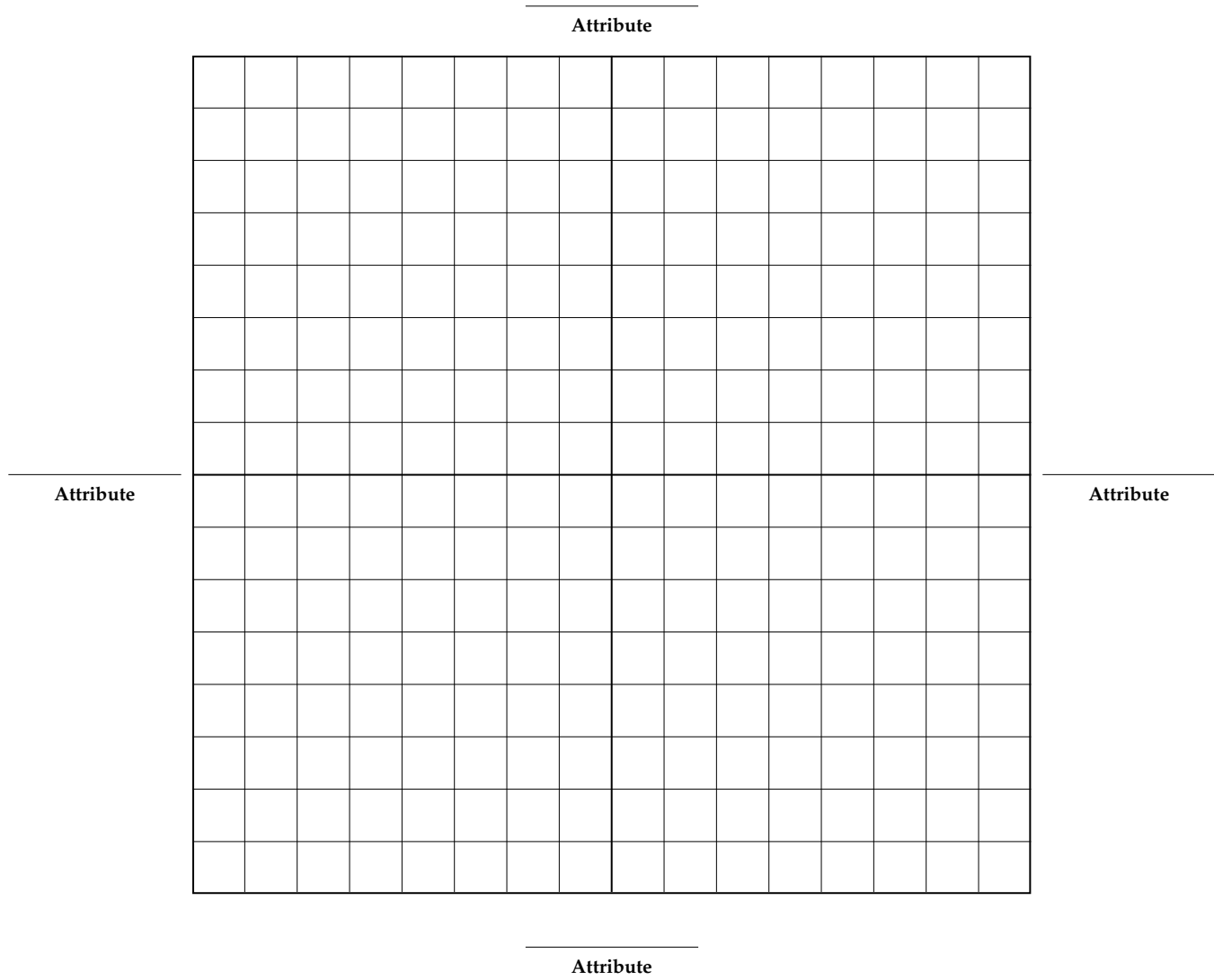




WORKSHEET 35 (Continued)

Method 3 for Finding Your Brand Promise: Positioning by Mapping (Continued)

Positioning by Mapping Polar Quadrants



WORKSHEET 35 (Continued)

Format for Your Brand Positioning Strategy

Step 1. Brand Foundation Story and Worldview

Step 2. Brand Promise

Brand Promise Format Option 1

To _____ [target: whom you're for], brand _____ [your company or product] is a _____ [industry category description] that offers _____ [what you do] that provides _____ [why you're different and why you're famous] because of _____ [reason to believe that's relevant to the target audience].

Brand Promise Format Option 2

Only brand _____ delivers _____ [unique benefit] to _____ [primary target descriptor].

Brand Promise Format Option 3

[Brand or company product] _____ is known for _____ [adjective], _____ [adjective], and _____ [noun].

Step 3. Brand Essence

Is

Is Not

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Step 4. Brand Personification

Step 5. Brand Vision

- It's the year 20XX, 15 years from now. Write three to four headlines that will appear in the newspaper, on your favorite Internet news site, on your Kindle, or on your Apple iPad about our company or our products and services based on the brand promise:

- Based on your brand positioning, people will describe you as:

Format for Your Brand Positioning Strategy (Continued)

- Based on your brand positioning, list five possibilities for your brand in the future:

1. _____
2. _____
3. _____
4. _____
5. _____

- What do you need to start doing or stop doing to bring your brand positioning alive?

Start Doing

Stop Doing

- Given your target market description, how will the brand positioning change the participants' expectations?
- How will our product and/or service portfolio change? Will we develop further, add to, or shrink our current product offerings? How?
- What product or service changes will take place? How will we develop our basic set of products and services? Will we have added new ones, eliminated others? Which are more important and less important?
- How will we change the ways in which we interface with our customers?
- How will we communicate differently in terms of what we say, how we say it, and where we say it?
- How will we get our product to our customers differently into the future?
- Will our customer service operations change?
- Internally, what things will evolve due to our brand positioning? Will we communicate differently with each other? What will be the structure of the organization? What jobs and personnel positions do we need more of and less of? What types of staff members, in terms of talent and experience, do we need more of and less of? How will our physical space look different? How will it change?

WORKSHEET 36 (Continued)

Method 2 for Setting Quantitative Sales Objectives: Inside Micro Approach

Projections from Top: Sales Forecast for Manufacturing, Service, or Retail Category*

	COMPANY SALES VOLUME			
	\$	Percent Change from Previous Year	Units	Percent Change from Previous Year
Previous 5 Years				
Year 1				
Year 2				
Year 3				
Year 4				
Year 5				
Next 3 Years' Projections				
Year 1				
Year 2				
Year 3				

Note: Complete a worksheet for your company's total sales and a worksheet for each individual product or department.

*Based on your type of business, include in your sales projections dollars and numbers of units, transactions processed, and people served. Also take into consideration new products, distribution channels, stores or services, and price changes. Use net dollar sales to trade and/or intermediate markets.

Projections from Bottom: Sales Forecast by Distribution Channel for Manufacturers*

Channel	EXISTING			NEW		
	Number	Dollars	Units	Number	Dollars	Units
Total						

Note: Develop projections for each year for a three-year period.

*In your sales projections, take into consideration new products, changes in distribution outlets, and price changes. Use net dollar sales to trade and/or intermediate markets.

Projections from Bottom: Sales Forecast by Store for Retailers*

	STORES	
	\$	Transactions
Market		
Name of store and store number		
Market total		

Note: Develop projections for each year of a three-year period.

*In your sales projections, take into consideration new stores, products, and services along with price changes. Service organizations use service offices or centers in place of stores. Retail and service firms use dollar sales to ultimate purchasers. Service organizations use the number of people served in place of transactions processed.

WORKSHEET 36 (Continued)

Method 3 for Setting Quantitative Sales Objectives: Expense-Plus Approach

Review of Historical Financial Data

Previous 5 Years	Gross Margin Dollars	Profit Percent of Sales	EXPENSES	
			Percent of Sales	\$ Millions
Year 1				
Year 2				
Year 3				
Year 4				
Year 5				

Expense Plus Calculations

Planned margin	%
Less Planned profit	%
Equals Operating expense	%

Budgeted Expense Dollars of \$ _____ ÷ Operating Expense of _____% = Sales Objective of \$ _____.

WORKSHEET 36 (Continued)

Reconciling the Sales Objectives

	MACRO		MICRO		EXPENSE PLUS		COMPOSITE SALES OBJECTIVES	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
Short Term								
1 Year								
Long Term								
2 Year								
3 Year								

Making Qualitative Adjustments to the Quantitative Sales Objectives

Qualitative Impacting Factors	±	Point Change	Percentage Adjustment	×	Composite Sales Objective	=	Adjusted Sales Objective
1.							
2.							
3.							

Total Adjusted Sales: \$_____ (total of adjusted sales objective)

New Sales Objective after Adjustments: \$_____ (total of adjusted sales divided by number of factors)

Notes:

1. List the qualitative factors and the extent to which they will impact the previous sales objectives that were numerically derived. Adjust the composite sales objectives accordingly to arrive at your final sales objectives.
2. Use qualitative adjustments for numbers of units, transactions processed, or people served, as well as for the sales dollars objectives for each year's projections. However, the percentage point adjustments may differ from dollars.

WORKSHEET 36 (Continued)

Format for Writing Your Sales Objectives Rationale

Sales Objectives for Manufacturers

Short Term (One Year)

1. Increase the dollar sales _____ % over the previous year, from \$ _____ to \$ _____.
2. Increase the unit sales _____ % over the previous year, from \$ _____ to \$ _____.

Long Term*

1. Increase the dollar sales _____ % from year _____ to year _____, from \$ _____ to \$ _____.
2. Increase the unit sales _____ % from year _____ to year _____, from \$ _____ to \$ _____.

Rationale

Notes:

1. Use this format for total company sales as well as for specific products.
2. Include profit objectives as well, using a similar format.

*List two- and three-year sales objectives separately.

WORKSHEET 36 (Continued)

Format for Writing Your Sales Objectives Rationale

Sales Objectives for Retail and Service

Short Term (One Year)

1. Increase the total dollar sales _____ % and transactions _____ % over the previous year, from \$ _____ to \$ _____, and from transactions to transactions.
2. Increase the comparable-store sales _____ % and transactions _____ % over the previous year, from \$ _____ to \$ _____, and from transactions to transactions.

Long Term*

1. Increase the total sales _____ % and transactions _____ % for year _____ to year _____, from \$ _____ to \$ _____, and from transactions to transactions.
2. Increase the comparable-store sales _____ % and transactions _____ % for year _____ to year _____, from \$ _____ to \$ _____, and from transactions to transactions.

Rationale

Notes:

1. Use this format for total company sales as well as for specific retail and service categories. Retailers might also want to use unit objectives. Service organizations use dollars and people or companies served.
2. Include profit objectives as well, using a similar format.

*List two- and three-year sales objectives separately.

CHAPTER 8 MARKETING OBJECTIVES WORKSHEET 37

Provide the following for each of your primary and secondary target segments.

Increased Trial by New Purchasers

- Penetration (number of company customers divided by the number of total potential customers in segment): _____

Objective: Obtain _____ number of new customers:

- Dollars per new customer: \$_____

Dollar result: Total dollars generated from objective: \$_____

Rationale:

Increase Retention of Existing Customers

- Number of existing customers in segment: _____
- Historical retention rate: _____

Objective: Retain _____% or _____ number of existing customers.

Dollar result: Total dollars generated from objective: \$_____

Rationale:

Increase Purchases by Existing Customers

- Number of existing customers in segment: _____
- Number of transactions per year purchase occasions: _____

Objective: Increase number of average yearly customer transactions or purchases from _____ to _____.

Dollar result: Total dollars generated from objective: \$_____

- Average dollars per purchase: \$_____

Objective: Increase average dollars per purchase from \$_____ to \$_____.

Dollar result: Total dollars generated from objective: \$_____

Increase Purchases by Lapsed Purchasers

- Total number of lapsed purchasers and users: _____

Objective: Obtain _____ number of lapsed purchasers such that they purchase, on average, _____ times a year at \$_____ per purchase.

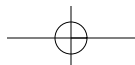
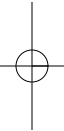
Dollar result: Total dollars generated from objective: \$_____



CHAPTER 9 COMMUNICATION OBJECTIVES WORKSHEET 38

Communication Values Review Worksheet

Tactical Tool	Activity	Results	Directional Implications
Product			
Naming			
Packaging			
Pricing			
Distribution			
Personal selling			
Advertising			
Promotions			
Media			
Interactive media			
Merchandising			
Public relations			



WORKSHEET 38 (Continued)

Tactical Tool Importance Rankings

Tactical Tool	AWARENESS		ATTITUDE	
	Purchaser	Nonpurchaser	Purchaser	Nonpurchaser
Product				
Naming				
Packaging				
Pricing				
Distribution				
Personal selling				
Promotions				
Advertising				
Media				
Interactive media				
Merchandising				
Public relations				

Note: VI = very important, I = important, MI = moderately important, NI = not important.

WORKSHEET 38 (Continued)

Locking Sales from the Target Market to Marketing Objectives and Communication Objectives

Communication Objectives Final Worksheet

Total sales: _____
 Total target market size: _____

	CUSTOMERS _____		NONCUSTOMERS _____	
Target Sales Objectives	\$		\$	
MARKETING OBJECTIVES	%	No.	%	No.
<i>Current purchasers:</i>				
Increase retention				
Increase purchase per customer				
<i>Nonpurchasers:</i>				
Increase new customers				
Acquire lapsed purchasers				
PURCHASE INTENT	%	No.	%	No.
Believe they will definitely purchase				

	UNAIDED AWARENESS PREVIOUS PURCHASERS		POSITIVE ATTITUDE PREVIOUS PURCHASERS		UNAIDED AWARENESS NONPURCHASERS		POSITIVE ATTITUDE NONPURCHASERS	
	%	No.	%	No.	%	No.	%	No.

Marketing Plan Communication Objectives

Tactical Tool Communication Objectives

- Product
- Naming
- Packaging
- Pricing
- Distribution
- Personal selling
- Advertising
- Promotions
- Media
- Interactive media
- Merchandising
- Public relations

Summary of Communication Objectives by Segment

The following quick summary sheet can be used in place of the more detailed chart located above.

Awareness: Increase awareness _____ percent over last year from _____ to _____.

Attitude: Increase perceptions across attributes (emotional and rational) that are critical to the company brand positioning:

Attribute

1. Increase positive perception of _____ from _____ to _____.
2. Increase positive perception of _____ from _____ to _____.
3. Increase positive perception of _____ from _____ to _____.

CHAPTER 10 MESSAGE STRATEGY WORKSHEET 39

Targeting and Go-to-Market Messaging Requirements

Think about the simplicity or complexity of your go-to-market messaging needs: one message to one audience, several messages to one audience, many messages to several audiences.

Positioning

Key Insights:

- 1.
- 2.
- 3.
- 4.

Message Strategy (What story are you telling?)

1. Why should the target care (emotional reason to believe)
2. Why should the target believe you (rational reason to believe)

Platform Idea

CHAPTER 11 UMBRELLA STRATEGY WORKSHEET 40

The 19 Umbrella Strategies

Provide a rationale for each of the following strategies:

Target market strategies

Pricing strategies: Low cost or differentiation

Building the market or stealing market share

National, regional, and local market strategies

Product strategies

Naming strategies

Packaging strategies

Seasonality strategies

Spending strategies

Competition strategies

Distribution of product and penetration or coverage strategies

Personal selling, service, and operations strategies

Promotions and events strategies

Advertising strategies

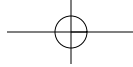
Media strategies

Interactive media strategies

Merchandising strategies

Public relations strategies

Marketing research and testing (R&T) strategies



CHAPTER 12 PRODUCT, NAMING, AND PACKAGING WORKSHEET 41

Development of a Marketing Plan for a New Product

Product Objectives

Product Strategies

Rationale

WORKSHEET 42

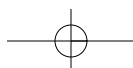
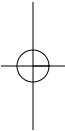
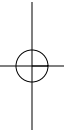
Development of a Naming Plan

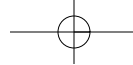
Naming Objectives

Naming Strategies

Naming Parameters

Rationale





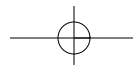
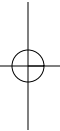
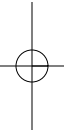
WORKSHEET 43

Development of a Packaging Plan

Packaging Objectives

Packaging Strategies

Rationale

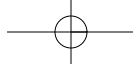


CHAPTER 13 PRICING

WORKSHEET 44

Pricing Considerations

Consideration	Specific Situation	Pricing Implication	Potential Price Approach
Problems and opportunities	_____	_____	_____
Marketing objectives	_____	_____	_____
Positioning	_____	_____	_____
Marketing strategies	_____	_____	_____
Price communication goals	_____	_____	_____
Breakeven	_____	_____	_____
Price elasticity	_____	_____	_____
Product life cycle stage	_____	_____	_____
Product differentiation	_____	_____	_____
Business goals	_____	_____	_____
Competition pricing	_____	_____	_____
Other	_____	_____	_____



WORKSHEET 45

Development of a Pricing Plan

Pricing Objectives

Pricing Strategies

Rationale

CHAPTER 14 DISTRIBUTION

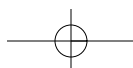
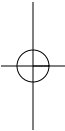
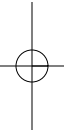
WORKSHEET 46

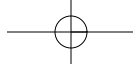
Development of a Distribution Plan

Distribution Objectives

Distribution Strategies

Rationale





CHAPTER 15 PERSONAL SELLING **WORKSHEET 47**

Development of a Personal Selling and Service Plan

Personal Selling and Service Objectives

Personal Selling and Service Strategies

Rationale

CHAPTER 16 ADVERTISING CONTENT **WORKSHEET 48**

Integrated Advertising Content Creative Blueprint

Communications Objectives

Brand awareness:

Attitudes:

Advertising Model

Creative Strategy

What's your brand promise or brand idea?

What's your subject matter?

Whom are you talking to?

What barriers or trigger points does the audience have?

Which key communications drivers are you trying to affect?

What are your key messages?

What are the reasons why?

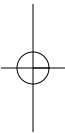
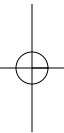
What's your brand persona or archetype?

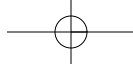
Content Mandatories for Execution

Legal considerations:

Specific calls to action (toll-free numbers, website addresses, retail channels):

Media selection, size requirements, and so on:





CHAPTER 17 PROMOTIONS

WORKSHEET 49

Format for a Promotion Plan

Promotion Objectives

Promotion Strategies

Rationale

WORKSHEET 50

Promotion Event Execution

Program Theme

Sales Objective

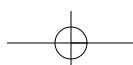
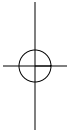
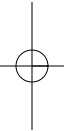
Promotion Objective

Promotion Strategies

Description

Support

Rationale



WORKSHEET 51

Calculation for the Cost of a Coupon Promotion

	High	Medium	Low
Redemption Costs			
Value of coupon			
Number of coupons distributed			
Estimated redemption rate			
Number redeemed			
Dollar value of offer (number redeemed × value of coupon)			
Advertising and Media Costs			
Printing of coupons			
Mailing costs			
Total cost of promotion			

WORKSHEET 52

Payback Calculation for an Open Promotion

Situation

Promotion:

Time period:

Geography:

Sales

Estimated sales for period without promotion:

Estimated gross margin dollars for period without promotion:

Estimated sales with promotion:

Estimated gross margin dollars with promotion:

Estimated net margin dollar increase with promotion:

Media and Advertising Cost

Estimated ongoing advertising and media costs with or without promotion*:

Total advertising and media costs with promotion:

Incremental advertising and media costs due to promotion:

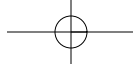
Payout

Incremental margin sales:

Incremental advertising and media expenditures:

Contribution to fixed overhead:

*What would have been spent in regular mainline advertising and media.



CHAPTER 18 ADVERTISING MEDIA WORKSHEET 53

Format for a Media Plan

Budget and Rationale (Optional)

Media Strategies

Target Audience

Geography

Seasonality and Timing

Weight and Impact Goals

Quantitative

Qualitative

Media Test Objectives (Optional)

Rationale for Strategies

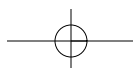
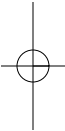
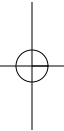
Media Selection

Media mix

Define role for each medium:

Specific vehicles for each medium:

Specific scheduling for each medium:



WORKSHEET 54

Format for a Media Budget

Spending by Medium and Quarter

Company, Product, and/or Service:

Year:

Date:

Medium:	1st Quarter (\$)	2nd Quarter (\$)	3rd Quarter (\$)	4th Quarter (\$)	Total (\$)	Percent %
Total	\$	\$	\$	\$	\$	
Percent	%	%	%	%		100%

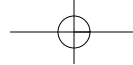
Spending by Product or Market and Media

Company, Product, and/or Service:

Year:

Date:

Medium									Total Spending by Product or Market	
Product or Market	\$()	%	\$()	%	\$()	%	\$()	%	\$()	%
Total spending by medium	\$	%	\$	%	\$	%	\$	%	\$	100%



CHAPTER 19 INTERACTIVE COMMUNICATIONS

WORKSHEET 56

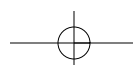
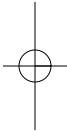
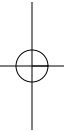
Format for Establishing Internet Media Objectives

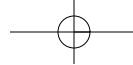
Short-Term Objectives

Rationale

Long-Term Objectives

Rationale





WORKSHEET 57

Format for Establishing an Internet Media Strategy

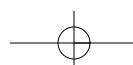
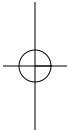
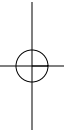
Overview and Description

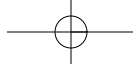
Rationale

Target Market Considerations

Technology and Infrastructure Considerations

Possible Alternatives





WORKSHEET 59

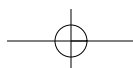
Website Interaction Inventory

List interactive features or forms to be included on your website. For each item, identify the individuals within your organization who have information needed to create the interaction.

Item	Description and Contact Person

Information Structure

Create and attach an outline of the content to be included on your website. The main headings in the outline should correspond to groups of content that should be available from the home page of your site.



WORKSHEET 60

Developing a Website Implementation Plan Overview

Scope

Budget

Estimate the hours and costs associated with the project. Costs should include staff time, vendor costs, and anticipated hosting and maintenance costs.

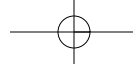
	Hours	Cost
Staff-related costs		
Vendor costs		
Hosting costs		
Maintenance costs		
Total		

WORKSHEET 61

Website Development Timeline

Create a general timeline for completing project milestones.

MILESTONES	DATES
Planning	
Evaluate competitive industry category sites, and make an analysis of website stats.	
Define site requirements, and create a site map.	
Design	
Create design and content options.	
Select design.	
Production	
Give content to website developer.	
Have database design reviewed and approved, if applicable.	
Implement the site (create the site).	
Testing	
Launch the beta installation.	
Proofread and test the website.	
Conduct an internal beta installation review.	
Obtain client's final review and approval.	
Make final changes, and proofread and test the corrections.	
Distribution	
Site goes live.	



CHAPTER 20 MERCHANDISING

WORKSHEET 62

Developing a Merchandising Plan

Objectives

Strategies

Rationale

CHAPTER 21 PUBLIC RELATIONS

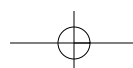
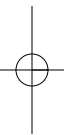
WORKSHEET 63

Developing a Public Relations Plan

Objectives

Strategies

Rationale



CHAPTER 22 BUDGET, PAYBACK, AND CALENDAR WORKSHEET 64

Marketing Plan Budget

Marketing Mix Tool	\$	Percent of Total Budget
Advertising Media		
Television		
Newspaper		
Radio		
Direct mail		
Outdoor display		
Other		
Total		
Internet Media		
Total		
Production		
Television		
Newspaper		
Radio		
Direct mail		
Outdoor display		
Other		
Total		
Product, Naming, and Packaging		
Total		
Personal Selling and Operations		
Total		
Promotions		
Redemption cost		
Media support		
Production		
Total		
Merchandising		
Production		
Total		
Public Relations		
Total		
Research		
Total		
Miscellaneous		
Total		
Grand Total		

WORKSHEET 65

Marketing Plan Budget Comparison

	\$	Percent of Sales
Total Budget Compared to Industry Average and Previous Year		
Marketing as a percent of sales per plan		
Marketing as a percent of sales per industry average		
Index: Company budget to industry average		
Index: Company budget to previous year		
Total Planned Budget Compared to Competition		
Total planned budget for company		
Total estimated budget for Competitor A		
Total estimated budget for Competitor B		
Total estimated budget for Competitor C		

WORKSHEET 66

Contribution-to-Fixed-Costs Payback Analysis

Assumptions

Sales

Less cost of goods sold

Gross profit

Less:

Media

Production costs

Promotion costs

Merchandising

Selling

Research

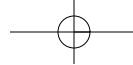
Public relations and miscellaneous

Total marketing mix tools

Contribution to fixed costs

Fixed costs

Profit before taxes

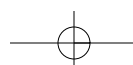
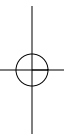


WORKSHEET 67

Gross-Margin-to-Net-Sales Payback Analysis

Assumptions

	Year 1 Projections	Year 2 Projections	Year 3 Projections
Net sales			
Gross margin			
Less promotion			
Less advertising			
Profit or loss			



CHAPTER 24 PLAN EVALUATION

WORKSHEET 69

Key Evaluation Metrics

Key Evaluation Metrics for Target Market Segment 1

Description _____

	Current Year's Rank	Next Year's Rank	And so on
Share Numbers			
Share of mind			
Share of market			
Share of wallet			
Share of closet			
Brand Development Index (BDI)			
Category Development Index (CDI)			
Share of visits			
Average dollars spent per purchase			
Market penetration of product category			
Target market segment penetration			
Purchase index			
Measures of Awareness, Attitudes, and Perceptions			
Unaided awareness			
First mention awareness			
Aided awareness			
Knowledge ratio			
Awareness conversion rate			
Key attribute perception shifts			
Attribute 1 _____			
Attribute 2 _____			
Attribute 3 _____			
Relevance			
Esteem			
Differentiation			
Loyalty Measures			
Retention ratio			
Sole purchase			
Satisfaction scores			
Attribute 1 _____			
Attribute 2 _____			
Attribute 3 _____			
Future purchase intent			
Recommend to a friend			

Key Evaluation Metrics for Target Market Segment 2

Description _____

(See categories above.)

Key Evaluation Metrics for Target Market Segment 3

Description _____

Etc., as pertinent to your plan.

WORKSHEET 70

Growth Rate of Improvement (GRI) Sales Trending Method: Preperiod-to-Test-Period Comparison

Evaluation Objective

Evaluation Strategies

Evaluation Execution

Test Market versus Control Market Dollar Sales Analysis

Test Period _____

	Last Year	This Year	Percent Change
Preperiod versus Test Period _____	Preperiod		
	Test market		
	Control market		
	Test period		
	Test market	Control market	
	Preperiod Percent Change	Test Period Percent Change	Point Gain or Loss
Growth rate of improvement (GRI)			
Test market			
Control market			
Net percent point difference			
Incremental sales: GRI _____ × test period sales \$ _____ = net weekly gain \$ _____			

	Last Year	This Year	Percent Change
Test Period versus Postperiod _____	Test period		
	Test market		
	Control market		
	Postperiod		
	Test market	Control market	
	Test Period Percent Change	Postperiod Percent Change	Point Gain or Loss
Growth rate of improvement (GRI)			
Test market			
Control market			
Net percent point difference			
Incremental sales: GRI _____ × test period sales \$ _____ = net weekly gain \$ _____			

Growth Rate of Improvement (GRI) Sales Trending Method, Continued

	Last Year	This Year	Percent Change
Postperiod versus Preperiod _____	Postperiod		
	Test market		
	Control market		
	Preperiod		
	Test market		
	Control market		
	Postperiod Percent Change	Preperiod Percent Change	Point Gain or Loss
Growth rate of improvement (GRI)			
Test market			
Control market			
Net percent point difference			
Incremental sales: GRI _____ × test period sales \$ _____ = net weekly gain \$ _____			

Test Market versus National System Average Dollar Sales Analysis

	Last Year	This Year	Percent Change
Preperiod versus Test Period _____	Preperiod		
	Test market		
	National system average		
	Test period		
	Test market		
	National system average		
	Preperiod Percent Change	Test Period Percent Change	Point Gain or Loss
Growth rate of improvement (GRI)			
Test market			
National system average			
Net percent point difference			
Incremental sales: GRI _____ × test period sales \$ _____ = net weekly gain \$ _____			

	Last Year	This Year	Percent Change
Test Period versus Postperiod _____	Test period		
	Test market		
	National system average		
	Postperiod		
	Test market		
	National system average		
	Test Period Percent Change	Postperiod Percent Change	Point Gain or Loss
Growth rate of improvement (GRI)			
Test market			
National system average			
Net percent point difference			
Incremental sales: GRI _____ × test period sales \$ _____ = net weekly gain \$ _____			