

PHOENIX CONCEPTS, LTD. LONG-TERM MARKETING PLAN ANALYSIS WORKSHEET

Filling the following worksheet out thoroughly helps us write the most accurate marketing plan possible-one that works with,not against,your corporate goals. The more team members that contribute to this worksheet, the better. We stand by the belief that clear two-way communication and working together every step of the way is the only environment in which a successful marketing plan can be executed and flourish. This worksheet may also be modified for project-specific marketing plans of a briefer nature by leaving the appropriate questions. Thank-you for your help.

- Market segment you have/description (current customers):
- Who do you think your potential customers are:
- Who do you want your customers to be:
- Forecasted Annual Growth Rate:
- Forecasted Annual Purchase Per Customer:
- General needs and requirements:
- Current distribution channels:
- Competition profile:
- Current means of marketing communications:
- Marketing techniques you'd like to use:
- Marketing techniques you will not use:
- What attributes does your company have that are unique to the marketplace:
- What you think your keys to success will be:
- Estimated annual marketing budget:
- Current mission & vision statements:

Marketing/Business Plan Results

What you can expect to receive when we produce a long-term marketing plan for your company:

- 1) Target market definition with rationale
- 2) A suggested list of strategies, tactics and programs
- 3) Planned expenses by program (estimated)
- 4) Suggested marketing promotion timeline
- 5) Estimated return-on-investment statement (based on general market forecast information, company-specific information to date, and averaged program returns)