

Marketing Plan Template

This marketing plan template is adapted from [this article](#) from Forbes.com.

Section 1: Executive Summary

Complete your Executive Summary last, and, as the name implies, this section merely summarizes each of the other sections of your marketing plan.

Your Executive Summary will be helpful in giving yourself and others an overview of your plan.

Section 2: Target Customers

This section describes the customers you are targeting. It defines their demographic profile (e.g., age, gender), psychographic profile (e.g., their interests) and their precise wants and needs as they relate to the products and/or services you offer.

Being able to more clearly identify your target customers will help you both pinpoint your advertising and better “speak the language” of prospective customers.

In the global north, most permaculture course participants are adults who have a strong interest in gaining practical skills for sustainable living, building networks of like-minded people, or exploring how to live closer to nature. However, within these broad themes, there can be a huge diversity. Who do you want to attract to your courses and why?

Customer Personas

You should create a few (5 or 6) customer personas - fictional but realistic characters that represent the people that you expect/hope to get on your courses. You could draw inspiration from people who have attended previous courses, if you think they are representative of your core market.

To create each persona, put yourself in their place and answer the following questions. Adding a photograph helps to picture each persona and remember their needs/desires when working on other areas of your marketing plan...

Photograph

Personal Background

- 1) Describe your personal demographics: age, gender, etc.
- 2) Describe your educational background.
- 3) Describe your career path.

Employer

- 4) In which industry or industries does your employer work?
- 5) What is the size of your employer (revenue, employees)?

Role

- 6) What is your job role? Your title?
- 7) Whom do you report to? Who reports to you?
- 8) How is your job measured?
- 9) What does a typical day look like?
- 10) Which skills are required to do your job?
- 11) What knowledge and which tools do you use in your job?

Challenges

- 12) What are your biggest challenges?

Goals

- 13) What are you responsible for?
- 14) What does it mean to be successful in your role?

Watering Holes

- 15) How do you learn about new information for your job?
- 16) Which publications or blogs do you read?
- 17) Which associations and social networks do you participate in?

Shopping Preferences

18) How do you prefer to interact with vendors?

19) Do you use the internet to research vendors or products? If yes, how do you search for information?

20) Describe a recent purchase.

Section 3: Unique Selling Proposition (USP)

Having a strong unique selling proposition (USP) is of critical importance as it distinguishes you from competitors.

The hallmark of several great companies is their USP. For example, FedEx's USP of "When it absolutely, positively has to be there overnight" is well-known and resonates strongly with customers who desire reliability and quick delivery.

The Permaculture Design Certificate (PDC) has a strong USP that resonates with customers: "learn skills to enable you to live more ethically and sustainably". But what makes the PDC (or other course) that *you* offer unique? Examples could include:

- Amazing venue with excellent living examples of permaculture in action
- Specialist diet (e.g. vegan permaculture course)
- Integrated with Ecovillage Design Education course
- Extremely experienced teaching team
- Urban focus
- etc.

Section 4: Pricing & Positioning Strategy

Your pricing and positioning strategy must be aligned. For example, if you want your courses to be known as the premier courses in the permaculture community, having too low a price might dissuade students from enrolling.

Conversely, if financial accessibility is a key message in your promotional material, you must offer places at prices that are affordable for people on low - or no - incomes.

The Permaculture Association does not set course prices (other than the diploma), or make any recommendations on course pricing. However, many teachers and course providers offer prices

on a sliding scale, where more affluent students can opt to pay more for the course, in order to subsidise others on lower incomes.

Section 5: Distribution Plan

Your distribution plan details how customers will buy from you. For example, will customers purchase directly from you on your website? Will they buy from distributors or other retailers? And so on. Think through different ways in which you might be able to reach customers and document them in this section of your marketing plan.

How will students access the course? Will it be (in the case of a PDC):

- A two-week residential course arranged and promoted by the venue?
- Two x one-week residentials organised and promoted by you, with bookings taken via the Permaculture Association website?
- A series of weekends in a city, and supported by the Workers Educational Association?
- An online course via an established online learning platform like Udemy?
- A mixture of distance learning and face-to-face?

How might you leverage any existing distribution/promotion channels to maximum effect?

Section 6: Your Offers

Offers are special deals you put together to secure more new customers and drive past customers back to you.

Offers may include free trials, money-back guarantees, packages (e.g., combining different products and/or services) and discount offers. While your business doesn't necessarily require offers, using them will generally cause your customer base to grow more rapidly.

For example, could students who have done an intro course with you get a discount on a full PDC? Or could students who did a PDC with you get a discount on an advanced or specialist design course?

Section 7: Marketing Materials

Your marketing materials are the collateral you use to promote your business to current and prospective customers. Among others, they include your website, print brochures, business cards, and catalogs.

Identify which marketing materials you have completed and which you need created or re-done in this section of your plan.

Section 8: Promotions Strategy

The promotions section is one of the most important sections of your marketing plan and details how you will reach new customers.

There are numerous promotional tactics, such as paid advertising (e.g. in Permaculture Magazine or other green organisations' publications), press releases, online advertising, and event marketing. As a member of the Permaculture Association you can list your courses in our course listings for free. This will automatically be added to Permaculture Magazine's course listings pages.

In this section of your marketing plan, consider each of these alternatives and decide which ones will most effectively allow you to reach your target customers.

Section 9: Online Marketing Strategy

Like it or not, most customers go online these days to find and/or review new products and/or services to purchase. As such, having the right online marketing strategy can help you secure new customers.

Some key components to your online marketing strategy are:

1. *Keyword Strategy*: identify what keywords you would like to optimize your website for.
2. *Search Engine Optimization Strategy*: document updates you will make to your website so it shows up more prominently for your top keywords.
3. *Paid Online Advertising Strategy*: write down the online advertising programs will you use to reach target customers. For example, Facebook allows posts to be boosted to very targeted audiences affordably and easily.

4. *Social Media Strategy*: document how you will use social media websites to attract customers.
5. "[Inbound marketing](#)", AKA "content marketing" AKA blogging.
6. Email marketing: managing a list of people who have done courses with you in the past, or who have enquired about courses and sending them occasional updates and offers via email.

Section 10: Conversion Strategy

The techniques you employ to turn prospective customers into paying customers.

For example, increasing your social proof (e.g., showing testimonials of past clients who were satisfied with your service) will nearly always boost conversions and sales.

In this section of your plan, document which conversion-boosting strategies you will use.

Section 11: Joint Ventures & Partnerships

Joint ventures and partnerships are agreements you forge with other organizations to help reach new customers or better monetize existing customers. For example, if you sell permaculture courses, it could be quite lucrative to partner with a local LAND centre who had a list of thousands of visitors whom it had hosted to learn about eco-friendly gardening etc.

Think about what customers buy before, during and/or after they buy from you. Many of the organizations who sell these products and/or services could be good partners. Document such organizations in this section of your marketing plan and then reach out to try to secure them.

Section 12: Referral Strategy

A strong customer referral program could revolutionize your success. For example, if every one of your customers referred one new customer, your customer base would constantly grow. However, rarely will you get such growth unless you have a formalized referral strategy. For example, you need to determine when you will ask customers for referrals, what if anything you will give them as a reward, etc. Think through the best referral strategy for your organization and document it.

Section 13: Strategy for Increasing Transaction Prices

While your primary goal when conversing with prospective customers is often to secure the sale, it is also important to pay attention to the transaction price.

The transaction price, or amount customers pay when they buy from you, can dictate your success. For example, if your average customer transaction is \$100 but your competitor's average customer transaction is \$150, they will generate more revenues, and probably profits, per customer. As a result, they will be able to outspend you on advertising, and continue to gain market share at your expense.

In this section of your plan, think about ways to increase your transaction prices such as by increasing prices, creating product or service bundles/packages, and so on.

Section 14: Retention Strategy

Too many organizations spend too much time and energy trying to secure new customers versus investing in getting existing customers to buy more often.

By using retention strategies such as a monthly newsletter or customer loyalty program (such as discounts of future courses), you can increase revenues and profits by getting customers to purchase from you more frequently over time.

Identify and document ways you can better retain customers here.

Section 15: Financial Projections

The final part of your marketing plan is to create financial projections. In your projections, include all the information documented in your marketing plan.

For example, include the promotional expenses you expect to incur and what your expected results will be in terms of new customers, sales and profits. Likewise include your expected results from your new retention strategy. And so on.

While your financial projections will never be 100% accurate, use them to identify which promotional expenses and other strategies should give you the highest return on investment.

Also, by completing your financial projections, you will set goals (e.g., your goals for your referral program) for which you should strive.