



HEY. A Guide to Developing a Sales and Marketing Plan



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Contents

1. Introduction	3
2. Case Study: Airco	4
3. Sales and Marketing Planning	
What is a Sales and Marketing Plan	6
Why is a Sales and Marketing Plan important?	7
What do I need to have prepared before I start?	7
4. Practical Steps to Creating Your Own Sales and Marketing Plan	
Seven Steps to Create Your Sales and Marketing Plan	
Outline Your Mission and Goals	8
Target Market	8
Strategies	9
Tools, Software and Systems	10
Timescale Planning	10
Budgeting	11
5. Appendices	13
5.1 Template to create your Sales and Marketing Plan	16

1. Introduction

This guide has been designed to assist you in preparing your first Sales and Marketing Plan. It describes what a Sales and Marketing Plan is, why it is important and the key elements you should consider when creating this. The plan can be a 'stand-alone' document or be one section of your Business Plan.

This guide also contains a series of practical steps to help you gather the information you will need to prepare your plan as well as a template to use that will assist you to write your first plan quickly and effectively.

Taking the time to prepare a Sales and Marketing Plan will help you to gain answers to key questions you will have about how to identify, reach and sell to your target market (customer groups) as well as how to analyse the results of your marketing campaigns and make appropriate adjustments to grow your business in the future.

Intended Readers:

This guide is primarily aimed to assist:

- Individuals who are thinking about starting their first business venture, who are exploring a business idea and the potential opportunities that may exist for it in the market
- Individuals who have developed their business idea and recently started their first business venture. This includes those who are at the stage of having conducted some Market Research and are now beginning to promote their business and plan marketing campaigns.

The information provided in this guide has been prepared for individuals as an initial 'First Step' towards better understanding how to prepare and implement a Sales and Marketing Plan. This is a key area of business development and it is recommended that you read around the topic area when using this guide to further broaden your understanding of sales and marketing. You should also consider speaking to a professional business advisor who can answer any specific questions you may have.

Other Guides in the Series:

A Guide to developing a Business Plan

A Guide to understanding your Target Market (Market Research)

A Guide to Branding

A Guide to Financial Forecasting (Cash Flow)

A Guide to the Marketing Mix (Media Channels)

2. Case Study: Airco

AIRCO



It's a business which now employs around 170 people across the UK and works in the homes of the rich and famous including household name politicians and pop stars – and it all started in Hull with one man and his van.

Neil Fisher, Managing Director of Airco, said: "I was doing refrigeration and air conditioning and I worked for a couple of different companies but I wanted to go on my own. I bought a van for £700 and went door-knocking, handing out leaflets and business cards to drum up business. In those days it was all about an advert in the Yellow Pages."

Neil only took his first steps to find premises after a neighbour became concerned about him running a business from home, and the move to English Street was a master stroke.

He said: "It was right on the fish dock and we did a lot of work for Marr Vessel Management. They changed their trawlers into seismic survey ships and we took out the refrigeration equipment and installed air conditioning for data equipment."

Recruitment included hiring an apprentice who is now Airco's Operations Director and the company also went through a succession of new homes en route to its current site in Goulton Street, where a training centre built in 2015 is now being extended.

The UK network includes early acquisitions in Milton Keynes and Immingham plus more recent additions in London, Leeds and Birmingham with the changing workload reflected by the need for staff to work in their local area.

Neil said: "A lot of contracts require us to be on site within two hours if it's business critical work, such as health and data centres. In recent years we've also had a lot of gas engineers and plumbers who are taking out boilers and fires and installing air source heat pumps."

"It used to be about rejecting heat but now it's all about recovering heat and capturing it, storing it and using it for domestic hot water. Everybody is looking for energy efficiency and heat recovery is a massive part of what we do."

Airco will soon embark on its next five-year plan, buoyed by the success of the last one which saw business double. Neil is confident of further growth by operating across a variety of sectors and committing to quality.

"You learn as the years go by that certain customers don't buy on price, they buy on quality and reliability. Understanding your customer is the winning ticket."

Neil Fisher
Managing Director of Airco

3. Sales and Marketing Planning

What is a Sales and Marketing Plan?

Planning is the process of thinking about the activities required to achieve a desired goal and it is the first and foremost activity you will undertake on the journey to achieve your desired results. In the case of Sales and Marketing, the desired goal(s) and performance results will be directly related to what you want your business to achieve in terms of gaining new customers, selling products / services and how satisfied they are with the whole experience they have had dealing with your business.

A Sales and Marketing Plan contains a description of those main activities that you decide to do that will hopefully result in you achieving the results that you are looking for. There are lots of different things to consider when putting your plan together. This will require you to make choices about how exactly you want to achieve the goals (and objectives) you have set yourself. The way (or approach) that you choose to get from where you are now to where you want to get to (your goal / objective) is called a 'strategy' and you will develop many strategies with your plan, one for each of the different goals / objectives you have created. You will be able to monitor and track how these strategies are working and adjust them from time to time if you do not think that they are working well enough or that they need to be re-aligned to meet a new common business goal in your business plan.

A Sales and Marketing Plan will include multiple strategies, for example, how you plan to identify potential customers, how you intend to brand your product and services, the communications media that you plan to use to get your promotional messages to reach target customers and so on. Some examples of common business goals you may use to structure a sales and marketing plan can include creating plans around quarterly or yearly revenue goals, plans around different styles and approaches to promotional content to reach specific target customer groups or a new product or service launch plan.

Why is a Sales and Marketing Plan important?

There are numerous reasons why spending time on creating your Sales and Marketing Plan is important for your business and its success, here are just a few:

1. Better understand the marketplace, potential customers and how to reach them with your promotional messages through a mix of marketing media as well as to find out more about the competition and how you will be different from them in ways that help you to 'stand out from the crowd' in a good way.
2. Opportunity to gather your thoughts and ideas about how you will grow your business by generating customer interest and selling products and services to them in ways that encourage them to keep coming back for more.
3. Focus on what needs to be done, when it needs to be done by and what resources / facilities you will need to put in place to implement these activities / actions.
4. Develop in detail the steps you will need to take to achieve your goals, helping you to form a strategy with timelines for you to put the marketing in place. Using a timeline for goals and targets can be helpful to not just the planning and implementing stages of your marketing efforts, but also to monitoring and analysing the success of each marketing strategy you implement.
5. Budget for your plans to ensure you are spending your time and money effectively and wisely when marketing your products or services. Without a plan, it can be hard to identify the purpose of your marketing efforts, who you are trying to reach and how well you are succeeding.
6. Assess your strategies, goals and results to help you and all members involved in the marketing efforts to remain focused and provide a consistent approach to your marketing efforts when everything has been planned and thought through in advance.
7. Apply for finance or investment using the plan as evidence of what direction you are intending to drive your business in and how you intend to do that.

The various items of brand identify that you create are your intellectual property and you will need to consider how best to protect them. There are several different legal rights that you have available to use, these include: copyright, registered designs, trademarks, patents, etc. Whilst some of these are automatic rights, others will require you to apply for them and pay the fees associated with this. Once you have successfully gained registration, you can use these legal rights to stop others from copying or stealing them as well as trying to pass themselves off as you, to gain your customers.

What do I need to have prepared before I start?

Before you begin to work on your Sales and Marketing Plan, there are a couple of core elements which are essential to have taken time to research and understand. This is to ensure that you have all of the relevant and necessary information that will help you build a good Sales and Marketing Plan which will work for you and your business.

Firstly, it is important to understand your product or service offerings in detail. You should have a good understanding of how to describe your core Unique Selling Proposition (USP) and the value you are providing to your customer. By having this thorough understanding, you can work efficiently on preparing core promotional messages about your products or services which you can communicate to your customers through appropriate media channels, such as social media, radio, printed adverts, etc.

Secondly, it is equally important to have a thorough understanding of your target market, who your customer groups are and why they will benefit from your product or service. Failure to have a thorough understanding of your product or service and how this will fit in the market, may mean that you miss communicating and promoting key information about your offerings which could result in your target customers not becoming engaged.

Sometimes your business concept can be the hardest part to explain to someone else. This is why understanding your target customer as much as possible will make your marketing much more successful and effective. The more that you can demonstrate that you really understand your customer's needs and situation, the better your chances will be to persuade them to engage with you.

4. 8. Practical Steps to Creating Your Own Sales and Marketing Plan

Below are seven key steps to creating a sales and marketing plan. Once completed you will have a thorough actionable plan of marketing activities and strategies which you can implement and monitor to assist you in achieving your business goals. You can use the worksheet attached in the appendix to help structure your sales and marketing plan.

Seven Steps to Create Your Sales and Marketing Plan:

1. Outline Your Mission and Goals

The first place to start when creating your sales and marketing plan is to work on outlining a mission statement for your business. A mission statement is a short concise statement which defines the purpose of your business and who your business serves. Every business should have a clear mission statement to identify the purpose of their businesses existence and who their business is serving.

When writing a mission statement, it should reflect the following points:

- What you do
- Who you do it for
- How you do it
- How it helps your customers including:
 - The direct benefit to the individual consumer and what problem you are solving for them
 - Why customers should buy from you over your competitors (what makes your business unique)

Once you have written the mission statement for your business, it is important to also write one or more sales and marketing goals. These should be precise and measurable goals which you are aiming to achieve as an outcome from executing your sales and marketing plan. An example goal could be to generate a specific number of customers and/ or a specific amount of revenue, etc.

Example: *To gain 30 new customers with sales totalling £25,000 or more within the next 12 months.*

2. Target Market

The second step in creating your sales and marketing plan is to define your target market, in terms of key customer groups, which you are going to be targeting in the future. For each customer group you should identify specific qualities/personas that each group has in common. As an example, you may target one customer group who are of a similar age (i.e. 20-30 years of age), you may target another customer group based on their lifestyle similarities (i.e. golfers) and so on. By categorising your customer groups by their common similarities, you can begin to identify the 'needs and wants' of each customer group. You will also be able to explore which of your products and services best match each customer group's 'needs and wants' as a business.

As explained earlier in this guide, understanding your target market is crucial to being able to get your promotional message(s) to reach your target customers. The more you understand what each customer group is looking for, the easier it should be for you to customise your marketing plan to specifically meet the needs of each separate customer group. Before moving on from this step in your sales and marketing plan, ensure that you understand who your target customer is, what they want and why they will benefit from your business.

3. Strategies

So far, you have defined your mission with accompanying sales and marketing goals and you have identified the main (target) Customer Groups that you want to engage with to sell your products / services. It is now time to think about the best way to approach how you want to engage with sufficient numbers of those potential Customers (in target Customer Groups) that will enable you to achieve the sales and marketing goals you have set for the business. You can do this by developing strategies.

A strategy is the approach you choose to adopt that will guide you to achieve the goal(s) you have set for your business. It will help you to identify the specific tasks to be undertaken to achieve your goals and this will include how to reach your target customer groups and turn these into purchasing customers.

There are often many different ways to achieve a goal. Each different way (or approach) is what we call a strategy, for example a goal to gain 30 new customers in the next 12 months may be achieved in several different ways, such as:

1. You may adopt a strategy to do all the sales and marketing yourself
2. You may decide to adopt a strategy where you outsource the sales and marketing to a specialist
3. You may use a strategy of recruiting a sales person to work for the Business to meet the goal

You can't do all of these at the same time, so you will need to decide which strategy (approach) is likely to be the best one for you, given all the circumstances that are affecting you at this time, in particular, the amount of money you may have to spend on

achieving this goal and how much time you may have available as well as how good you are at sales and marketing.

When identifying and selecting the different sales and marketing strategies that are available to you, it is a good idea to ask yourself key questions, for example:

- a. What media you will use to reach specific customers (i.e. Social Media, Radio Adverts?)
- b. What are the key messages to be communicated, including any call to action which you want the specific potential customers to do (such as purchase an item, etc.)
- c. What geographical areas are your potential customers located in
- d. Do you need a different strategy for each target customer group you are aiming to reach?
- e. How will you measure the effectiveness of the strategy?

Also include any further supporting elements which are key to your strategy and its success, such as follow up actions required after the marketing activity is complete, or price and promotion elements not already listed.

You can identify strategies throughout the planning process, for example, you may consider multiple strategies for different forms of communication media as you look to identify the best approach to reach potential target customers (i.e. social media, e-marketing, printed advertising, etc.) and also identify different strategies that may be relevant to different customer groups.

You may also want to consider using the 5P's method to check that you have not missed or overlooked anything important as you develop your Sales and Marketing Plan. The 5 P's method covers five key aspects to be included in you plan, namely: Product, Place, Price, Promotion, People.

1. Product: Identify what aspect of your business, product or service you are going to be sharing with your target customer group and why that is relevant to that specific customer groups needs
2. Place: Analyse from your research, where is the best place to find this customer group is? How are you going to reach them?

3. Price: Consider whether your customers are going to be price sensitive, and how you are going to communicate the price of what you are offering.

4. Promotion: Consider if a promotion is the right approach for your customer group and your marketing campaign and what impact this will have on your profit margin.

5. People: It is also important to consider who is involved in the execution of any of your strategies. Do you need to hire additional team members or freelancers to execute your strategy, or do you have the appropriate skills and time to execute the strategies yourself?

Once you have listed your main goals and an overview of the strategies you have identified to fulfil each goal, it is time to select which strategies you want to adopt to drive your sales and marketing activities. Once you have selected the best suite of strategies for your business, to cover all of your sales and marketing goals, you will now be in a position to identify and organise all the many tasks and activities that will need to be undertaken and the order that they will need to be done in. This will enable you to start to arrange and structure the outline of your overall Sales and Marketing Plan.

Before moving on from this section ensure that you have a full breakdown of all steps (plan) required to implement each strategy and these are all compatible and working towards the same goal(s).



4. Who is Responsible?

Once you have defined your strategies and the tasks required to put these into action, it is also important to make sure that you identify who is going to be responsible for executing them. As discussed in the 5th P – People, this can include other team members, solely yourself or external support you may be hiring such as freelancers. It is important to identify the roles (jobs) which are required for each step of your Sales & Marketing Plan and clearly communicating who is responsible for each step.

If you are working individually on the execution of your Sales and Marketing Plan, use this step to identify roles (jobs) and tasks which you will need to accomplish in order to execute your plan and how you intend to do this, such as when you will set time aside to complete the tasks required and if you need to gain further knowledge, skills or expertise in order to achieve your desired outcomes (goals).

5. Tools, Software and Systems

Tools, software and systems are resources which you can use to help you manage the execution of your strategies. They can assist you with streamlining the steps involved to save you time and help to keep your marketing activities consistent. Whether you're executing your sales and marketing plan on your own or with a team, there will often be suitable software and systems which you can use to help you carry out your plan. Examples of systems or tools you may use to help you maintain consistency could be, for example, automating social media posts using a scheduling app so that you do not have to manually post each post at the preferred time. Always conduct research into software systems to ensure that they offer suitable functions to suit your strategies and goals.

You may also require the use of a Client Relationship Management (CRM) system, which helps you to track new leads and ensure that you keep on track with your customers, who needs to be contacted and who has received information etc. Other tools and systems you may require are scheduling apps to ensure your time is managed correctly.

There are numerous systems which you may require to help support you and your plan. It is useful at this step, to go through each of the strategies / planned tasks to see if any additional systems or software would be useful in executing your plan. It is important to also think here about the goal(s) of your marketing plan and how the intended customer will accomplish the required call to action (response you want them to take from your activity, for example, signing up to a mailing list or preferably, purchasing from you). By understanding every step of the process (Customer Journey) that a customer will experience with you, you should be able to more easily identify any useful software systems which will make the customer journey smoother and easier, both for the Customer and for you to manage.

6. Timescale Planning

Now you will have a good understanding of what goals you are aiming to achieve, the steps you need to take to achieve them and the resources you may need to execute your Sales and Marketing Plan.

The next step is for you to identify the timescales that you want things to be done by. This can be done by estimating when you think each key goal you have identified could be completed. With this information, you should be able to identify the order that the tasks leading to goal achievement should be done and estimate appropriate timescales for each of these too.

By adding timescales to the task and goals in your Sales & Marketing Plan, it should help you to structure and schedule when you will execute your planned tasks. This helps to keep you and other team members, to manage your plan and keep it on track.

When allocating timescales to specific tasks, remember to check to see if each task has any pre-conditions, for example some tasks can't start until an earlier task has been completed first. An example of this is in the case of writing promotional materials, only when these have been satisfactorily completed can they then be sent to potential / target customers. The relationships between tasks can affect the overall time it may take to complete all the tasks needed to be done before a particular goal can be achieved.

It is also important to consider any seasonal effects which may alter your intended customer's reactions to your marketing efforts and scheduling a timeframe which is appropriate.

7. Budget

Finally, yet equally important, is to define your budget. A budget is a financial plan which, in this case, you are allocating specifically to execute the tasks in your Sales and Marketing Plan.

Your budget could be a financial investment such as advertising budgets or outsourcing of work costs; however your budget can also take into account the amount of time you are required to invest in a particular strategy.

For each strategy you have outlined in this plan, you should identify a budget for each of these. Your budget can be calculated by the specific costs involved, for example freelance blog writing hire. However, you may need to also set a specific financial amount you are willing to spend for strategies such as pay per click advertising.

As you define your budget and the costs associated with each strategy, it is important to also remain conscious of the result you are aiming for and to define a 'Cost : Result' ratio. For example, you may allocate 1 hour per week as the cost for writing a blog post, with the result (measurable goal) being 25 views for each blog post. A financial example may be that the cost of an advertising campaign may be budgeted at £150 per calendar month, with the result being £500 revenue generated.

By setting a budget and monitoring this, you can track quickly and easily how your marketing plan is performing. This enables you to assess your strategies, the impact they are having and if they are performing as you intended. If they are not performing or resulting in the goal(s) you are aiming for, you can then begin to adjust your strategies and/or look at implementing new strategies based on the results achieved.



5. **Sales and Marketing Plan**

Company Name:

Date:

Table of Contents

Company Details	13
1. Mission and Goals	14
2. Target Market	15
3. Strategies	16
4. Responsibilities and Roles	17
5. Tools, Software and Systems	17
6. Timescale Planning	18
7. Budget	19

Company Details

Company/Business name:

Business Owners Name(s):

Business address:

Contact Number:

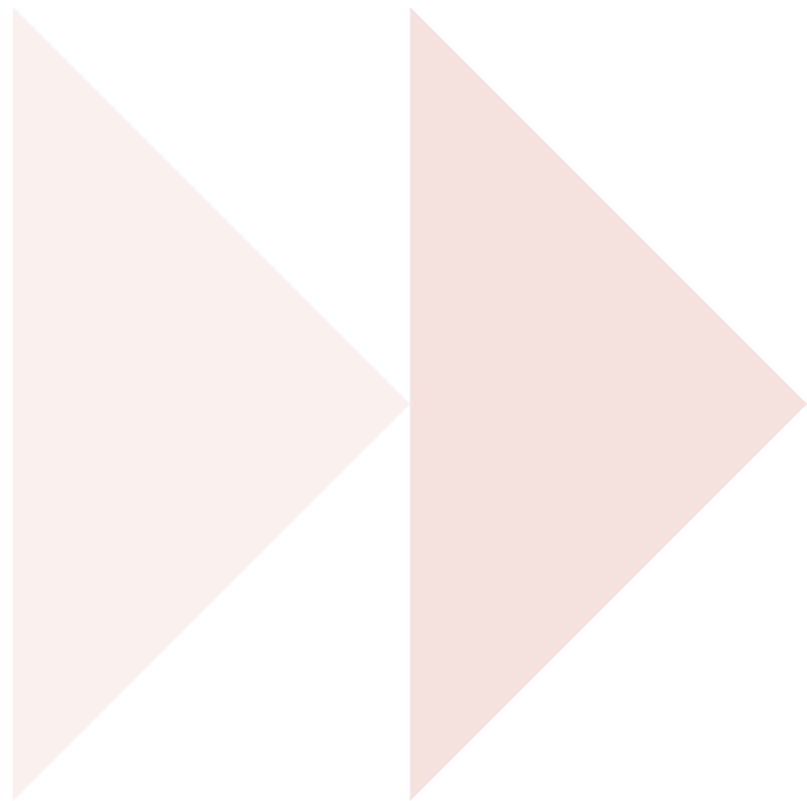
Email address:

5.1. Mission and Goals

Outline your business mission statement:

Outline your goal(s) for your sales and marketing plan:

(Remember to make your goals Specific, Measurable, Achievable, Realistic and Time-bound)



5.2. Target Market

Complete the table below to describe your target market, including the market segments you have identified and aim to focus on. Include any key identifying elements which need to be considered when targeting your market segments, including areas of interest for your customer groups and/or problems they may have, which you can solve.

Customer Group	Similarities	Needs/Problems	Where your business fits in	Other Information
(Outline your customer group e.g. Women over the age of	(Identify any elements this customer group has in common	(Identify any needs or common problems that this customer group experiences - in relation to your business	(Explain why your business would be of interest to this customer group. Comment on how your business solves their problems or addresses their interests)	(Any further additional information to explain your chosen customer group, who they are or why they would want to purchase from you

5.3. Strategies

Use the table below to help you to identify key strategies and related activities that will enable you to plan to meet your main sales and marketing goals.

Sales & Marketing Goal:

Achievement Date:

Strategy	Customer Target Group	Key Messages	Media Platform	Method of Activity	Further Information
(What approach do you want to take to achieve the above goal?)	(What customer group are you going to be targeting)	(What are the key messages you are going to be communicating and how are you going to communicate these?)	(What method are you going to use for this strategy e.g. Instagram, e-newsletter)	(What are the steps you need to do to put this strategy in place? How frequent will the activity be and what will it cost?)	(Describe any further information including any additional promotional or price information)

5.4. Responsibilities and Roles

Identify who is going to be involved in implementing the strategies / planned tasks and the roles and responsibilities that key individuals will undertake.

5.5. Tools, Software and Systems

Identify what tools, software and systems (resources) could be useful to help you implement your strategies. Identify any resources you will be using to support the implementation of your strategy and any costs associated with this.

For each resource, explain what strategy or step in your plan it will help with and explain the benefits as well as any negatives (such as cost implications) to using these systems.

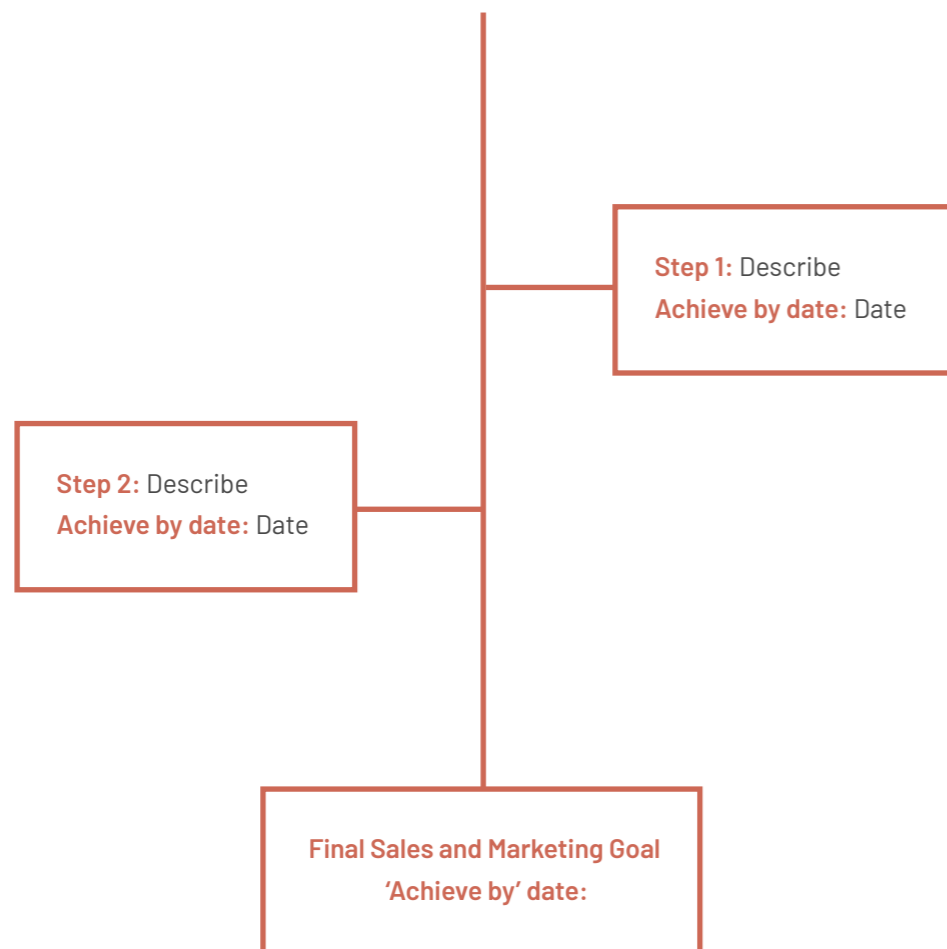
(You may only need to implement some systems and tools after your marketing efforts reach a certain stage).

5.6. Timescale Planning

Write a deadline to meet your goal(s) for the execution of your full sales and marketing plan:

Now breakdown the above goal into the numerous steps that will need to be completed to achieve the goal. Steps should be organised in the order that they will be undertaken and completion dates should be identified and recorded to ensure all the steps are finished by the overall deadline for achievement of the goal. The simple diagram below shows how this information can be illustrated in an easy to read format. The first two steps are shown as an indication, your diagram will have as many steps on it as you need to complete your goal.

Sales & Marketing Plan – Goal Completion Timescale Diagram



5.7. Budget

Explain your budget for your Sales and Marketing Plan including any costs which are incurred for each strategy you have set:

Calculate the 'Cost : Result' ratio for each strategy using the example below. The table diagram below shows how this information can be illustrated in an easily to read format. The first two strategies are shown as an indication, your table will have as many rows on it as you need to explain all of your strategies 'Cost : Result' ratio:

Costs	Target Result	End Result
Strategy 1: Total Cost	e.g. Revenue of £500 pcm	Total profit
Strategy 2: Total Cost	e.g. 100 new customers by the end of February	Total new customers

Costs	Target Result	End Result



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Start-
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