

I. Executive Summary

It is important here to give a high level overview of what will be discussed (and finally, determined) in this marketing plan. Things to discuss here include a short statement of where your company's marketing efforts are to date; the objective of your company's marketing efforts (increase brand awareness, fill a sales pipeline with leads, boost sales of a certain product, or maybe – all of the above); key strengths and weaknesses; etc. DO NOT present conclusions here or plans of action in great detail. This will only succeed in getting your top management to read the Executive Summary and not the rest of your plan.

II. Environmental Analysis

This is where you should give a "birds-eye" view of how your company is perceived – but not from your perspective. Get an outside view of your company. Do a short "survey" of five people who you would consider to be in your prime target segment of the market. Make sure your sample includes both customers and prospects, and you may want to get a view from one of the trade pub editors as well. Once you get in touch with these people to ask them about their perceptions of your company, include a couple of verbatim comments here for your executives to "chew" on. It can sometimes be eye-opening to find out what others think of you and/or your company.

- a) *External Environment* – In this part of the Environmental Analysis section, it is common to transition from the current status of your company in the marketplace to a market overview or "state of the market," briefly of course. You can include stats from research analysts and reports, reports results and/or news about specific target companies, etc. Be as specific as possible in this section. This is probably also the first place where you can talk about two or three of your major competitors, what perception is of them in the marketplace, and how they are doing things differently than your company, what marketing and sales efforts you see them making, etc.
- b) *Internal Environment* – Here is where it gets tricky. This section should cover the current internal environment at your company (and that includes sales reps and remote workers as well – not just those who are physically "internal"). Answer some key questions: Is your company set up to handle more sales and ultimately more customers? Is your company equipped to "step up" the marketing and sales efforts? Do you have the right people in the right places with the right tools doing the right things? Etc. If there are conflicting priorities between the IT and business people in your company, say so. If you need more budget or more people to put together an effective campaign, management needs to know that as well. Be honest, open and direct. Not harsh and critical, but direct. Make sure that criticisms come with compliments so that the overall objective of the plan is well-received

III. SWOT Analysis

- 1) *Strengths*
- 2) *Weaknesses*
- 3) *Opportunities*
- 4) *Threats*

IV. Marketing Objectives & Marketing Strategies

Marketing objectives may include things such as establish brand recognition in the insurance marketplace, develop a credible reputation for the company, and its products, and to increase sales by overcoming the challenges presented by competitors and the marketplace in general. These goals/objectives can be achieved by:

1. Exploiting the current strengths...
2. Overcoming the challenges...
3. Taking advantage of the opportunities...
4. Addressing and positioning the issue of ???...

The marketing strategies that we employ going forward will seek to make the best use possible of existing and available resources on every level to ensure that the action plan set forth is successful. Now here's the action plan.

V. Marketing Elements

- Company web site
- Press releases
- Company Newsletter or eNewsletter
- Printed Collateral
- Press Kit
- Expert Articles & Editorial Opportunities
- Advertising
- Trade Shows
- Target Markets
- Guerilla Marketing
 - Blogs
 - Bulletin Boards
 - Social Media
 - Other Online Opportunities