

[NAME OF COMPANY]

MARKETING PLAN

[date plan issued]

Contact: [name], CEO [or President]
[address]
[phone no. & fax no.]
[email]
[web site]

The information contained in this marketing plan is confidential and proprietary to [NAME OF COMPANY] (the "Company") and is intended only for the persons to whom it is transmitted by the Company or its representatives. Any reproduction of this document, in whole or in part, or the divulgence of any of its contents without the prior written consent of the Company, is prohibited.

This is a marketing plan. It does not imply and shall not be construed as an offering of securities. Persons interested in pursuing an investment should contact their professional advisors.

Confidentiality Agreement

The undersigned reader acknowledges that the information provided by [NAME OF COMPANY] in this marketing plan is confidential. Therefore, the undersigned reader agrees not to disclose any of such information without the express written permission of [NAME OF COMPANY].

It is hereby acknowledged by the undersigned that the information to be furnished in this marketing plan is in all respects confidential in nature (other than such information which is already in the public domain through other means) and that any disclosure or use of same by the undersigned may cause serious harm or damage to [NAME OF COMPANY].

Upon request, this document is to be immediately returned to [NAME OF COMPANY].

Signature

Print Name

Date

TABLE OF CONTENTS

Confidentiality Agreement	ii
I. Executive Summary.....	1
II. Situation Analysis.....	1
2.1 Market Summary	1
2.2 Competitors.....	1
2.3 Target Markets.....	1
2.4 Products & Services	2
2.5 Market Needs.....	2
2.6 Market Trends	2
2.7 Market Forecast	2
2.8 SWOT Analysis.....	2
2.9 Factors for Success	3
2.10 Risk Evaluation.....	4
III. Marketing Strategy	4
3.1 Market Entry & Initial Marketing	4
3.2 Marketing Objectives.....	4
3.3 Positioning.....	4
3.4 Overall Marketing Strategy.....	5
3.5 Market Research.....	5
IV. Financials, Budgets & Forecasts.....	6
4.1 Break-even Analysis	6
4.2 Sales Forecast	6
4.3 Marketing Expenses Budget	6
V. Controls 7	
5.1 Purpose of Plan.....	7
5.2 Implementation Milestones.....	7
5.3 Marketing Organization	7
5.4 Monitoring Procedures	7
APPENDIX "A" [support documents].....	8

I. Executive Summary

[Keep your executive summary short - 1 page or less is best]

[NAME OF COMPANY] (the "Company") is in the process of being formed/created as a *[describe, e.g. "a corporation incorporated under the laws of the State/Province of _____"]*, for the purpose of _____ in the _____ area *[fill in details of business and location]*.

The Company *[is/will be]* managed by a team of _____ individuals with a total of _____ years experience in the field of _____, a chief financial officer with _____ years of accounting and administrative experience, and _____ *[list]*.

[Describe the market need for the company's products / services and how the company will fill that need.]

[Describe the company's products / services and what makes them special and unique and sets them apart from your competitors' offerings.]

The Company will leverage its experience and expertise in the _____ industry to quickly gain market share. It is anticipated that profitability will be reached by Month _____, and revenues of approximately \$_____ will be generated in Year 3 of the plan.

II. Situation Analysis

The Company is entering its *[first / second / _____]* year of operations, and requires a comprehensive marketing plan to reach profitability and ensure its future success.

2.1 Market Summary

[Market research will be required for this section. Discuss the industry in general, and specifically in your area, growth or lack of growth, current trends, etc]

2.2 Competitors

[Discuss the company's competitors in the local market, how much of the market share they hold, their strengths and weaknesses in comparison with the company]

2.3 Target Markets

The Company has identified and profiled its target market(s) as follows:

Geographics:

- The geographic target is the city of _____ and surrounding area, which has a population of approximately _____.
- *[if catering to particular population segments, such as families with small children, include population information about that segment, such as:]* The targeted population of *[families with children under the age of _____]* is approximately _____.
- *[any other relevant geographic information]*

Demographics:

- *[Individuals / families]* between the ages of _____ and _____.
- Average annual household income of at least \$_____.