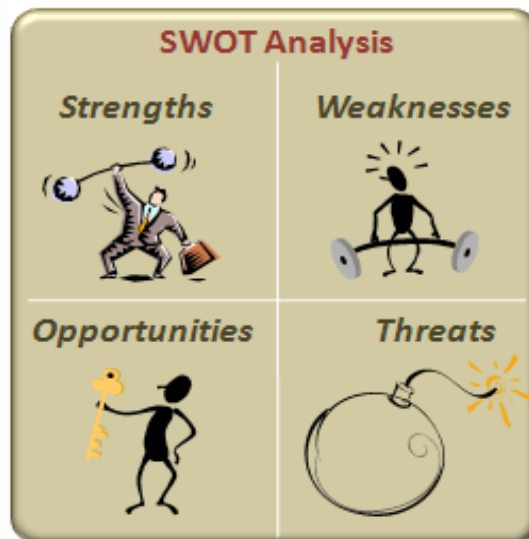


MARKETING PLAN SWOT MATRIX/ ANALYSIS



Marketing plan

- Important company document (1 year) vs. Long Term Plan (3-5 years)
- Summary of marketing activities and financial resources
- It must be approved:
 - ✓ by marketing management
 - ✓ by company management (local, regional, global)
- Is binding for other departments (???)



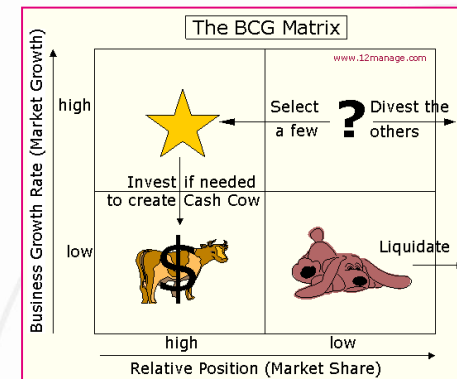
Marketing plan – 4 key activities



1. Situation analysis

WHAT WE KNOW?

- The systematic collection of relevant data
- Studies and analysis of past and present data
- Identify and estimate trends, market conditions and potential (competition, media, customer, consumer; micro and macro env.)
- Use primary and secondary data, both internal and external
- SWOT, PEST, Porter five forces analysis, BCG matrix



1. Situation analysis

- Market analysis
 - Competition (market share, prices, media investments, novelties...)
 - Consumers (current, potential, ex-users)
- MKT Strategy (Segmentation, Targeting, Positioning)
- MKT MIX
 - Product – quality, brand (awareness, loyalty, sales results (turnover, profit, margin, seasonality...))
 - Price – positioning vs. reality...
 - Place - distribution
 - Promotion – communication (effectiveness of expenditures, „brand power“)

1. Situation analysis – competition

Public and non-public competitive documents (Competitive intelligence)

- Annual reports, newspaper articles, exhibitions / fairs, publicly available research, associations ...
- Price lists, communication mix, awareness, loyalty ...
- Sales representatives, consumer research (competitive strengths and weaknesses), retail audits ...
- Present, Past – Trends

Aim:

- To understand the competitive strategy
- To minimize losses in the future



1. Situation analysis – Consumer

Public and non-public documents focused on consumer characteristics
(Customer value management)

- Publicly available research (sociological, psychological, anthropological studies), public administration, associations, publicly available statistics ...
- Consumer research (shopping and usage behaviour, media behaviour ...)
- Present, Past – Trends

Goals:

- Deep knowledge and understanding of consumer „insights“ (thinking)
- Proper segmentation, targeting and positioning and MKT Mix
- Minimize the cost to acquire and maintain valuable consumers



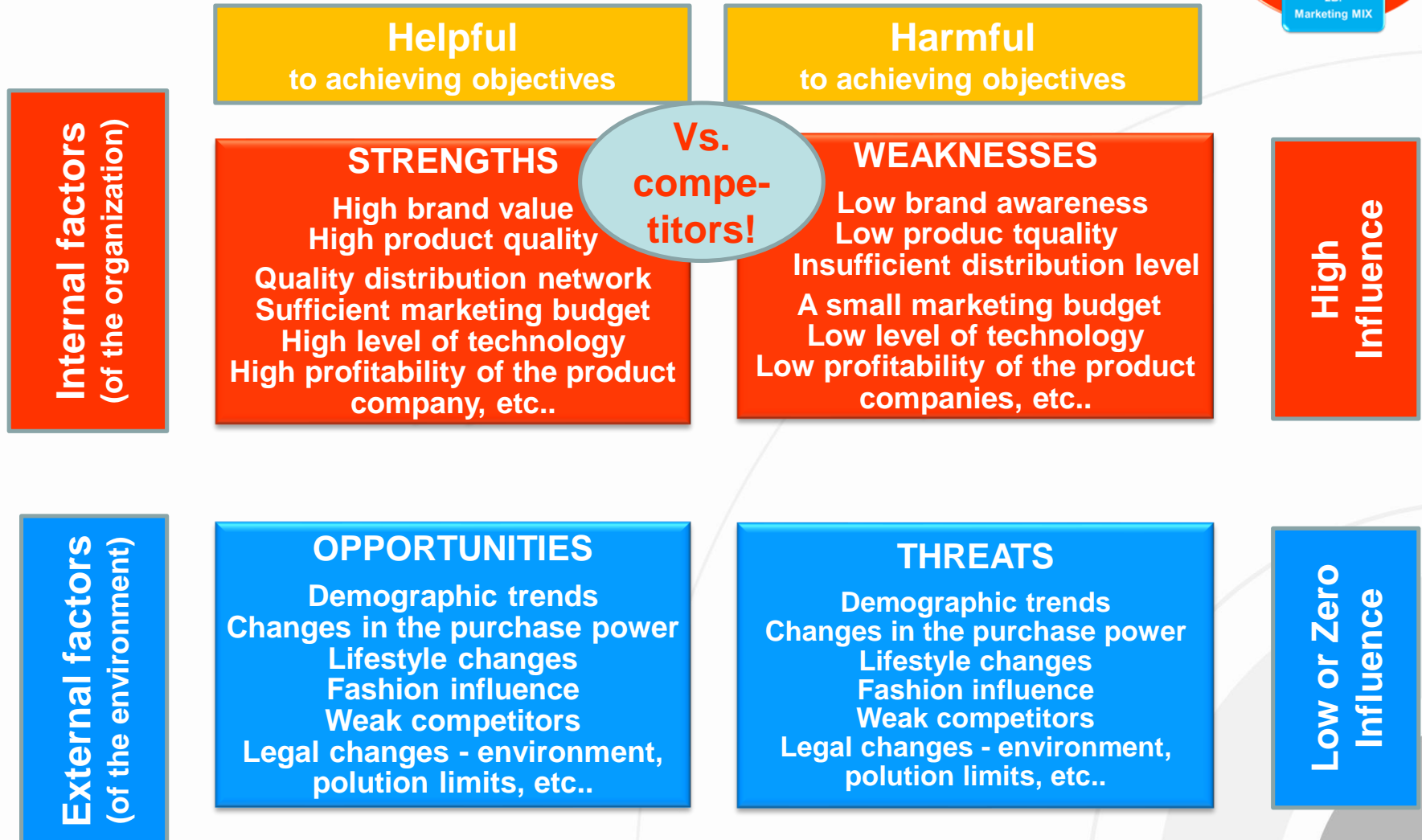
1. Situation analysis – SWOT



- The structured planning method (marketing, business)
- The basic tool to summarize internal analysis (strengths and weaknesses of the company) and external analysis (opportunities and threats)
- Method created by Albert Humphrey from the Stanford Research Institute (1960)
- The current situation + trends
- A simple tool with precise formulation of internal and external factors (from micro and macro environment – PEST, Porter’s 5, etc.)



1. Situation analysis - SWOT



1. Situation analysis – SWOT Rules

- Strengths and weaknesses **ALWAYS** compared to our competitors!
- Data, research results – **No wishes, dreams or doubts** (check!)
- No formulation of marketing strategy or marketing tactic (=MKT MIX)!
 - *Keep position Nr. 1;*
 - *Launch Audi A8;*
 - *Get distribution in Russia*
- Well balanced
 - **Strengths and Weaknesses** (more Strengths)
 - **Opportunities and Threats** (more Opportunities)
 - Max 4-5 statements of each quadrant



Situation analysis leads to Marketing objectives

Situation analysis

(Micro, Macro Environment – SWOT, PEST, Porter’s Five Forces, BCG Matrix etc.)



Key Issues and **Key success factors**
(you want and you can change them)



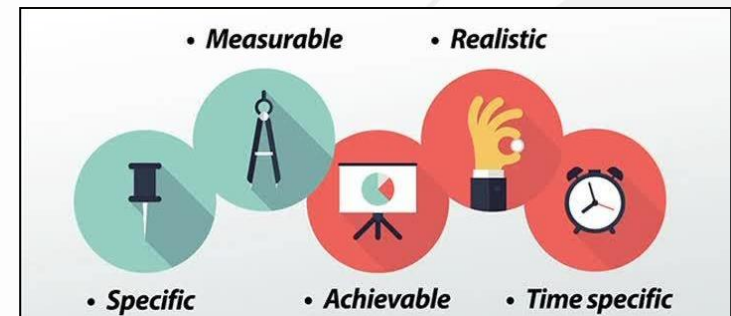
Marketing objectives

2. Marketing Objectives



WHAT WE WANT TO ACHIEVE?

- Objectives describe
 - **the desired future state of our brand/ product**
 - **The desired future consumer behavior towards our brand/ product**
 - Market share, sales, brand awareness, loyalty, launch, new product development ...
- **SMART**
 - Specific (reduce the number of complaints by 50% till 30/6/2019)
 - Measurable (control)
 - Agreed
 - Realistic
 - Timed (deadline)



2. Marketing Objectives

Objectives:

- Quantitative (well measurable)
- Qualitative
- As accurate as possible, not vague



2. Marketing Objectives - examples

Examples:

- Quantitative:
 - Increase penetration by 50% till 12/12/21
 - Increase shopping frequency by 15% till 12/12/21
 - Increase brand awareness, loyalty, quality image by ...
 - Develop new prototype of „Mochito“ chewing gum
 - To get Nr. 1 position in the hypermarkets (HPM) in value in 2021
 - To launch YETI bottles in CZ and SK markets in 2021
 - Achieve distribution level in HPM at 100% till 30/10/2021
 - Reduce the number of complaints by 50% till 30/6/2021
 - "Double digit growth“ of our profit/ sales in 2021
- Qualitative:
 - Rejuvenate the brand image among Women 20-35
 - Expand our premium product portfolio and premium sales channels
 - Develop only imagefull promotional activities in POS - stores
 - Create a product category from our brand (Nutella)
 - Set up bench marks for our TOP10 products



2. Marketing Objectives

Marketing objectives are split **into two main parts**:

2A) Marketing strategy

2B) Marketing mix

Marketing mix objectives always depend on Marketing strategy objectives



2A. Marketing strategy

Marketing strategy

- is oriented to develop strategic objectives; goals that solve strategical marketing issues covering:
 - Segmentation
 - Targeting
 - Positioning
- is valid for more than one year – long term objective



2B. Marketing mix

Marketing mix

- is oriented to develop tactical objectives; goals that solve tactical marketing issues covering 4Ps:
 - Product
 - Price
 - Promotion (= communication)
 - Place (= distribution)
- is valid for one year



3. Marketing Budget = Financial Plan

HOW MUCH MONEY WE NEED TO REACH OUR OBJECTIVES?
ARE WE ABLE TO GENERATE THEM?

- We have to calculate:
 - ✓ Research
 - ✓ Media communication (production + airing/ placement)
 - ✓ Promo activities
 - sampling – outdoor, indoor, print, on-packs...
 - Minies = miniproducts
 - Standard size
 - Events
 - On-pack gifts
 - Promo packs
- Marketing Budget – part of P&L (Profit and Loss analysis)



4. Action Plan

WHAT, WHERE, WHEN, (FOR HOW MUCH)...?

- Detailed plan for all marketing activities
- Different forms in every company
- Different form and different content for different target group (agencies, sales dpt., financial dpt., ...)

Action plan and budget allocation

Action	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total budget	% of total budget
Media	2 650	900	900	8 000	900	900	900	900	8 400	500	4 900	4 900	34 750	58%
TV				7 500					7 500		3 750	3 750	22 500	38%
Print		400	400		400	400	400	400	400		400	400	3 600	6%
Outdoor	2 000												2 000	3%
Digital	150										250	250	650	1%
Other													0	0%
Boxes	500	500	500	500	500	500	500	500	500	500	500	500	6 000	10%
Trade Marketing	2 000	0	0	2 000	0	0	0	0	2 000	0	2 000	2 000	10 000	17%
POS materials	2 000			2 000					2 000		2 000	2 000	10 000	17%
Tastings													0	0%
													0	0%
Marketing	500	0	0	5 000	0	0	0	0	5 000	0	4 000	0	14 500	24%
Digital	500												500	1%
Consumer promotion													0	0%
TVC development				4 000					4 000		4 000		12 000	20%
Pack development				1 000					1 000				2 000	3%
Sampling													0	0%
Others													0	0%
TOTAL													59 250	99%

Marketing plan

- „Preparation“ – **2-3 weeks** hard work
- „Presentation and approval“ – **1 hour** stress
- „Realization and analyzing“ – **365 days** minus above mentioned

DON'T FORGET THE SWOT MATRIX IMPORTANCE!

