

# YOUR MARKETING PLAN WORKSHEET

Worksheet for: \_\_\_\_\_  
(Marketing Plan Team member's name above)  
Master copy to be kept by coordinator

This is a Marketing Plan prepared especially for and by:

\_\_\_\_\_ Church

This is your marketing plan – a working document that, after you've completed the five steps in the Marketing Plan Process, will be ready for your church to implement.

The Marketing Plan Coordinator will transfer deliverables from each **Action Step** onto this document, keeping a Master Copy.

Each Marketing Plan Team Member will keep their own versions, along with other notes, in their Marketing Plan Workbooks.



*In your workbook, look for this icon that shows you what information to transfer onto your marketing plan.*



## Step 1: Values & Vision Deliverables

\_\_\_\_\_ church's **Core Values** are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Demographics:** The people of \_\_\_\_\_ church are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

\_\_\_\_\_ church's **Vision Statement** is:

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\_\_\_\_\_ church's **Key Messaging/Elevator Statement** is:

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## **Step 2: Perception & Need Deliverables**

Deliverables from this step will be a series of reports, summarizing the information gathered from the surveys, interviews/gatherings and focus groups conducted throughout this step.

**The Marketing Plan coordinator should attach the following summary reports to this document:**

- Congregational Survey Results or Team/Committee/Group Interview Summaries Report
- Newer Member Focus Group Summaries Report
- Community Survey Report or Community Member Gatherings Report



## Step 3: Strategy Deliverables

### **SWOT Deliverable:**

Strengths:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Weaknesses:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Opportunities:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Threats:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Target Audience Deliverable:**

1. What is my age? \_\_\_\_\_
2. What is my gender? \_\_\_\_\_
3. Where do I work or go to school? \_\_\_\_\_
4. What is my family situation (single, married, widowed, divorced, with kids, no kids)?

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5. Where do I live? \_\_\_\_\_
6. Where do I shop? \_\_\_\_\_
7. What do I do for entertainment? \_\_\_\_\_

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8. What is important to me? \_\_\_\_\_

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9. What do I read? \_\_\_\_\_

10. What do I watch on TV? \_\_\_\_\_

11. Where do I go on the Internet? \_\_\_\_\_

12. What would make me happy? \_\_\_\_\_

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13. What do I think about church and/or Christians? \_\_\_\_\_

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14. What would compel me to attend a church activity or service?

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**Strategic Objective Deliverable**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Goals/Measurable Objectives Deliverable**

Goals/Measurable Objective(s)	Method(s): How would you gather initial and then follow-up information?	Person/team responsible for gathering this information	Timing: When will it be completed?
Objective 1	Method(s)	Team(s)	Date(s)
<p>Example #1:</p> <p>To increase our church’s attendance of young families in our community by 15% over the next 6 months.</p>	<p>Example #1:</p> <p><u>Initial</u>: Conduct surveys, interviews and gatherings outlined in Step 2: Perceptions and Needs.</p> <p><u>Follow-up</u>: Repeat another local telephone survey or man-on-the-street interviews. (When compared to the initial research conducted, you’ll see what change with awareness has occurred.)</p>	<p>Example #1:</p> <p>Marketing Plan Coordinator/Marketing Plan Team (in partnership with a research professional)</p>	<p>Example #1:</p> <p><u>Initial</u>: Before the Marketing Plan launches</p> <p><u>Follow-up</u>: Repeat at the 12-month point</p>

**Resources Deliverable**

Financial Resources

Overall funds that will be directed toward marketing:

\$ \_\_\_\_\_

Breakdown of Budget (this will be better defined during Step 4: Tactics)

**Human Resources**

Personnel responsible for coordination and execution of your marketing plan:

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**Facilities**

How will our building be used to carry out our marketing plan?

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## Step 4: Implementation Deliverables

The Marketing Plan Coordinator will prepare a chart similar to the one below and attach it to Your Marketing Plan.

Objective	Target Audience	Measurable Objective(s) (supported by this tactic)	Tactic/Tool/Event	Timing (Key dates/deadlines)	Lead person or team	Budget info	Tactic Tracking/Evaluation
Objective 1	Audience 1	Objective 1	Tactic 1	Date	Team	Budget	Tracking
Example:  Increase church visibility	Example:  Young families in our community	Example:  To increase by 30% our church's visibility (awareness) with young families in our community throughout the next 12 months.	Example:  Tactic 1: Host a booth at the fall festival  Tactic 2: Set up mothers' morning out  Tactic 3: Provide after school tutoring program  Tactic 4: Have UMYF members invite a friend to a pool party	Example:  Festival is in Oct.  Setup by Labor Day  Setup by Aug. 15 <sup>th</sup>  Event date July 15th	Example:  Joe Smith  Elaine Wojciekowski  Dick Harrison  Melissa Honors	Example:  \$1,500  \$2,400  \$0  \$100	Example:  Track the # of booth visitors  # of families served  # of students helped  # of guests at the party and # of new enrollees for UMYF.

