Business and marketing plan (template)

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| Learner’s name: |  | Date:  |  |

**Company information** – provide details about your proposed company name and social media handles.

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| Business name and staff details |
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| Reason for choice of company name and information on branding |
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| Social media names (Twitter/Facebook/other – names must be available) |
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Business overview

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| **Description of services** |
| Services offered | Brief description of service | Pricing |
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Mission statement

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| (A mission statement provides a constant reminder of the overall vision that the organisation has and what it aims to do – the WHY behind your business.) |
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Market research

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| **Competitor analysis** |
| Company name | cation | Services provided | Pricing |
|  |  |  |  |

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| **SWOT analysis (with comparison to competitors)** |
| Strengths  | Weaknesses |
|  |  |
| Opportunities | Threats |
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| **Outline the market segments for your business using the MARS acronym****Measurable/Accessible/Responsive/Sizeable** |
| Measurable: Develop a profile of your business’ target market (including location, demographics, income etc.) |
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| Accessible: How do you plan to reach your target market with your promotional activity? |
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| Responsive: Does your target market respond to your planned activities? Any data to support this? |
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| Sizeable: What is the size of the market you are targeting? |
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| **Questionnaire** |
| (Develop a questionnaire of a minimum of 10 questions which will help you to understand your customers, pricing and service offering. The questionnaire should consist of a mix of open and closed questions. For ideas use the internet and search business and marketing questionnaires.) |
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Business aims and objectives

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| **Develop and record specific SMART business objectives** **Specific/Measurable/Achievable/Realistic/Time-framed** |
| Pre-launch goals: |
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| Short-term goal (First six months): |
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| Year 1 goal (To be achieved after 12 months): |
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| Year 2 goal: |
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| Year 3 goal: |
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Marketing plan

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| **Outline your promotional strategy for each of the following business timeframes (to include social media, advertising, promotional deals etc.)** |
| Pre-launch: |  |
| Launch: |  |
| Year 1: |  |

Design a leaflet to promote your business – Ideally you should use technology to produce this. You may attach a copy to your showcase record.

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| **Promotional leaflet brief (Double-sided leaflet)** |
| **Front side** |
| Strapline  |  |
| Marketing copy |  |
| Description of image (if applicable) |  |
| Colour preferences |  |
| **Flip side** |
| Marketing copy |  |
| Description of image (if applicable) |  |
| Colour preferences |  |

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| Press/media release (A sample press release to inform local media outlets of your new business venture) |
| Headline |  |
| Opening paragraph |  |
| Body |  |
| Closing paragraph |  |
| Targeted media outlets (List a minimum of 6 publications – online or otherwise) |  |

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| Learner’s name: |  | Date:  |  |
| Assessor’s name: |  | IQA’s name: |  |

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| **Business and marketing project** |
| The learner demonstrated that they:**BM1 Gathered, analysed and interpreted market research to identify a viable health and fitness product** **BM2 Identified competitors and analysed their strengths and weaknesses in comparison to own (using SWOT analysis)** **BM3 Identified the types of client who might be interested in the services and the benefits promoted** **BM4 Developed a marketing plan for the proposed business using the SMART model****BM5 Created an effective marketing campaign to promote their business and its products/services****BM6 Developed quality promotional materials using appropriate technology as needed in order to create a brand image** |
| Date | Outcome | Date | Re-Assessment |
|  |  |  |  |

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| Assessor feedback as to how the learner met the outcomes above (reference using BM1 to BM6): |
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**Showcase task 5 (Busin**e**ss Project)**

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|  Final result  |  |  | Pass |  | Refer  |