

Put your
logo here

Put your
Organization
Name here

Marketing Plan Template
Rev. 1.1, May, 2016

Sample: For Evaluation Only

MARKETING PLAN

Use this template to develop the information you will need to create an effective Marketing Plan for an Organizational Change initiative.

Mouse over the help symbols  to see help text.

Commented [.1]: Congratulations! You have found inline help!

Commented [.2]: What is the name of the Primary project for which Organizational Adoption work is being done?

Commented [.3]: Name of the person who has commissioned the project, defined its Business Value and has provided most or all of the required resources.

Commented [.4]: Name of the person who was primarily responsible for collecting, analyzing and documenting the information contained in this form.

Commented [.5]: Contact information of the analyst.

Commented [.6]: For example, the project will implement a new financial system, or update an existing business process.

Commented [.7]: When the primary project is completed, what will the organization have that it does not have now? e.g. a new capability, an improved way to perform the xyz process, etc.

Commented [.8]: What value does the organization hope to realize (e.g. financial gain or lower cost; improved compliance; reduction in organizational risk) as a result of this project being done? Business Value is the business reason the project is being done.













Commented [.9]: Why is this Marketing Campaign being carried out? What do you expect it to accomplish? Be specific.

Commented [.10]: Describe the general theme that drives branding in this project. What is the central message that you are trying to communicate?

Commented [.11]: This is a graphic symbol or stylized text that everyone will equate with the project.

Commented [.12]: A Sound Bite is like the catch phrase of a commercial jingle on television. "Whiter Teeth! And our product didn't kill you!" It should be something that is catchy and stays with you after you hear it.

Commented [.13]: Describe any other steps you plan to take as part of your Branding Strategy.

1. General Project Information	
Project Name: 	
Project Sponsor: 	Business Unit
Analyst: 	Contact Info 
2. Branding	
Describe your Branding strategy below.	
Project Purpose: What product or service will this project produce? 	
Vision: What will this project provide to the organization? 	
What is the intended Business Value of this project? 	
Purpose of the Marketing Campaign 	
Describe the Branding theme for this project 	
Enter Project Logo 	
Enter Sound Bites to be used in literature/videos/presentations 	
Other 	

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3. Management Participation

Describe what the Management Team has agreed to do. For each, indicate the degree of commitment, describe the event and indicate who plans to participate.

Speak at special events 	Event:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe	Participating:
Speaking Tour 	Event:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe	Participating:
Featured ...	Event:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe	Participating:
Video ...	Event:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe	Participating:
Emails / ...	Event:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe	Participating:
Unannounced ...	Event:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe	Participating:
Other 	

Commented [.14]: Special events include, for example, an unscheduled informal all hands meeting or a major address in an auditorium.

Commented [.15]: This could consist of one or more executives visiting various geographical locations and offering a presentation.

Commented [.16]: Describe any other forms of management participation that you plan to use in this project.

A portion of this template is available for your review

The complete template is available at www.cvr-it.com

Interested in this topic? See our course: [Leading People to Embrace Change](#)