

Executive Summary

Summary

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Current Situation

Market Situation

Market Size (units, dollars, shares) over past years  
Typical growth  
Market and Geographical segments  
Industrial segments  
Customer needs and perceptions  
Buying behaviour trends

Product Situation

Sales  
Prices  
Contribution margins & net profits  
.....past years.....table  
Benefits: why do customers buy this product ?

Competitive situation

Major Competitors identified  
Size of each competitor  
Goals  
Market Share  
Product Quality  
Marketing strategies

Distribution Situation

Largest customers  
Now  
In 2 y / 5 y  
Why customers buy from us

Supply Chain Maps

Suppliers → Manufacturer (us) → customers

Critical planning information  
Inventory Holdings along the supply chain

## Macroenvironment Situation

### Broad trends

Demographic  
Economic  
Technological  
Political / Legal  
Social / Cultural

## Opportunity and Issue Analysis

### Opportunities and Threats facing the business

List of Opportunities.....brainstorm, affinity, pareto

List of Threats

Analysis: what can a given opportunity be developed to ?

Priority!!! What do we really need to take advantage of?

What risk does a given threat pose to this market ?

Ranking...which ones do we really need to worry about ?

What do our customers think of us in this business?

### Strengths and Weaknesses of the product

What are the product's strengths ? Why ?

What do the customers say about the product? Data ?

How secure are the strengths ? (eg patent protected)

What are the product's weaknesses?

Do they need to be improved?

Any "fatal flaws"? ie must improve now

Eg key component not working (cf GE's CAT scanners)

Eg technology being superseded

Cost of improvement?

Cost/ benefit analysis / chart of improvements

### Issues

Define issues from Strengths / Weaknesses

Prioritise Issues

Which business should we be in?

Which product line

4P: product, distribution, price and promotion policies ...the same or change?

Advertising and promotion

R+D..does the product need it? Priority / Benefits?

## Objectives

### Financial Objectives

ROI	Prosper
Profits	Succeed
Cash Flow	Survive

### Marketing Objectives

Sales \$\$ , units needed to meet financial objectives?  
Price ...meet costs, desired profit, projections...  
Market share, what advertising, distribution needed to get there?

## Marketing Strategy

Target Market

Positioning

Product Line

Price

Distribution Outlets

Sales Force

Service

Advertising

Sales Promotion

Research & Development

Marketing Research

## Action Programs

Timing of programs  
Timelines

Projected Profit and Loss Statements

Year 1

Year 2

Year 3

Controls

Contingency Plan

Potential Problem Analysis