Version 0.0

Date



Tactical Marketing Plan

Document subtitle

Presented by: Your name

company name

Company address

# Tactical Marketing Plan

Use the Tactical Marketing Plan to identify the action items and expectations that surround marketing your product or service. Use this template to begin the process of brainstorming and building your marketing plan.

## Plan Overview

| **Practice:** | **Name** |
| --- | --- |
| **Name of Campaign:** | Campaign name |
| **Campaign Manager:** | Manager name |
| **Subject Matter Expert:** | Expert name |

## Objective

Describe your objective.

## Target Market

In this section, you need to define your current customers and the potential customers you want to target.

### Product Demographics

Describe your product demographics.

### Target Contact Demographics

Describe your target contact demographics.

## Message Summary

Summarize your message.

## Call to Action

Use this section to brainstorm words or phrases that ask the customer to take action.

### What is the desired outcome?

Describe your desired outcome.

### What is the pull-through offer?

Define your pull-through offer.

## Process

### List Development

Describe your list development.

### Prospecting Mechanism

Describe your prospecting mechanism.

### Pre-event Follow-up

Define your pre-event follow-up.

### Post-event Follow-up

Define your post-event follow-up.

## Opportunity Qualification Process and Criteria

Define your opportunity qualification process and criteria.

## Project Plan

### Necessary Event Resources

| **Resource** | **Role** | **Estimated Work Hours** |
| --- | --- | --- |
| Resource 1 | Role | Time |
| Resource 2 | Role | Time |
| Resource 3 | Role | Time |

### Budget

Compile a list of pertinent items that you will use to create your budget line items (for example, booth rental, amenities, travel). Use the Marketing Budget Plan template to build your final budget.

* List all pertinent items.

Define all pertinent items.

### Metrics and Expectations

* List all metrics and expectations.

Define all metrics and expectations.

### Approval

| **Title** | **Name** | **Date 1** | **Date 2** |
| --- | --- | --- | --- |
| CEO | Name | Date 1 | Date 2 |
| Campaign Manager | Name | Date 1 | Date 2 |
| Product Manager | Name | Date 1 | Date 2 |
| Project Manager | Name | Date 1 | Date 2 |
| Title 5 | Name | Date 1 | Date 2 |
| Title 5 | Name | Date 1 | Date 2 |

# Campaign Sign-off

The undersigned accept this Marketing Campaign as described herein.

|  |  |  |  |
| --- | --- | --- | --- |
| Print First and Last Name | Title | Signature | Date. |
| Print First and Last Name | Title | Signature | Date. |
| Print First and Last Name | Title | Signature | Date. |
| Print First and Last Name | Title | Signature | Date. |
| Print First and Last Name | Title | Signature | Date. |
| Print First and Last Name | Title | Signature | Date. |
| Print First and Last Name | Title | Signature | Date. |
| Partner (Printed Name) | Partner (Signature) |  | Date. |
| Print First and Last Name | Title | Signature | Date. |

Note: Additional signatures might be required if the document changes significantly per the client’s request.