



**restaurant
association**
of new zealand

A photograph of a man with a beard and short hair, wearing a white t-shirt, standing in a restaurant kitchen. The image is overlaid with a semi-transparent red filter. In the background, there are shelves with various kitchen items and a chalkboard with some writing. A large red curved shape is on the right side of the image.

**business
resource.**

Guide: Creating a Small Business Marketing Plan

thought for food.

Introduction

This template walks you through each element of a small business marketing plan. A strategic marketing plan should act as a reference document to help you guide your marketing decisions. It will also help you to develop a methodical approach to communicate a clear message about your venue.

When writing a marketing plan you need to be clear about your marketing objectives and how you think you might achieve them. A good marketing plan sets realistic objectives; includes budgets, action points, allocates responsibilities and discusses how to measure success to develop new actions and changes to update the plan with. Essentially the plan should read like a story and be connected. Your actions need to help achieve the goals, the goals need to match your vision and greater business strategy.

Your marketing plan should include the following elements:

- A summary of your marketing plan – make it easier for people to understand the plan in a concise way
- Background analysis of your business and the market you are operating in.
- Marketing objectives and strategy of your business
- Your marketing mix
- Marketing Action / Activities
- Budgets
- Organisational implications
- Evaluation and monitoring strategies
- Supporting documentation

Keep it up to date

Planning your marketing should be an ongoing business activity. As the market conditions and your business change, you will need to revisit many of the ideas and strategies outlined in your marketing plan. By referring to your plan regularly, you will ensure that your business keeps heading in the right direction.

Communication Strategy

Think about your communication strategy.

A common concept is IMC (Integrated Marketing Communication) - this is just the idea that everything you communicate (by this we mean, ad's, websites, signs, social media, newsletters, venue design, menus, radio ads etc, every point at which a customer interacts with your business there is communication) is in a similar manner with your brand, in recognition of your vision and values etc. Ie, if you are thinking about doing a promotion using a prize, does the prize you are giving away match your vision and values? Or, if you decide to set up a farmers market stall, will the design of your stall, signs etc, match your current theme?

A key term here is congruence. Do actions and ideas fit together with other things you are doing in a way that would not confuse people about what your business values are. It's best to get several other people to give their opinion.

How to get started

Prior to completing this marketing plan template, consider the following:

1. **Gather together your key business documents.**
2. **Take your time and consider your specific needs and capabilities.**

How much time do you have? Do you have the ability to design?

3. **Decide on your audience for the document.**

Consider your audience when writing your marketing plan. Will the plan be used internally? Or will you be sharing it with others? Deciding on the purpose of the plan can help you target your answers appropriately.

4. **Don't run before you walk.**

It's a common mistake to think of actions you can take before considering appropriately what your target market is or setting any goals. You may have great ideas but if not setup in the right way may be inefficient.

Use the marketing plan template on the following pages to help set up your own plan.

Marketing Plan

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Executive Summary

[Complete this page last. The marketing plan summary is a snapshot of your more detailed answers from your marketing plan. It should be easy to read, simple to follow and tell a story.]

Background Analysis

[The background analysis should give a snapshot of where you are right now, where you have been and where you want to go. Undertaking this process will help you to define your business's capabilities and find opportunities within your particular market. Finally, defining your core business elements will ensure that your marketing plan and overall business strategy work together seamlessly.]

Your Business

Business name:

Business structure:

NZBN:

Business location:

Date established:

Business owner(s):

Owner/s experience:

[Create a brief summary of your (and other owner's) experience in the industry and any major achievements/awards.]

Products or Services:

[What do you sell? Describe your current venue offering, the concept etc.]

Market Overview

Target market:

[It is useful to describe your potential target market. Use some statistics if you can. Eg,

The restaurant caters to the local community of around 10,000 residents. We also attract customers from surrounding suburbs. We are a dine-in establishment and our décor and theme is aimed at attracting mid 30's to 50's affluent patrons.

- Is the area experiencing population growth or decline?
- Does the region where you operate have a stable economy?
- Are there any seasonal variations that might affect sales?
- What is the size of the market?
- What recent trends have emerged in the market?
- Is there potential for growth in the market? How will you be able to capitalise on any opportunities?
- How will your entrance affect the market/customers?
- What external factors will affect your customers?]

Customer profile:

[What is the profile of an ideal customer for your business? In one or two sentences, clearly define your ideal customer - their needs, buying patterns and motivations for buying.]

Competitor profile:

[What's the profile of a typical competitor for your business? What marketing mix do they use? Have you identified any gaps in their marketing strategy? List who you think are your top 5 direct competitors (operations like yours), and 5 indirect (businesses that don't offer the same or similar as you but could take away a purchase, ie a Restaurant vs Fish & Chip shop)]

Business overview

Vision statement:

[A Vision statement should describe WHERE you want your business to be in the future. It should communicate both the PURPOSE and VALUES of your business and answer the question, 'Why are we here?' [See The Golden Circle by Simon Sinek](#)]

Mission statement:

[A Mission statement should outline HOW you will get to where you want your business to be in the future (Your Vision). It should define the PURPOSE and PRIMARY OBJECTIVES of your business and answer the question, 'What do we do?']

Short Term goals:

[Guidance: What are three primary short-term goals for your business (6 months)?]

Goal/Objective	Description	By when
{insert Goal/Objective name}	{insert Brief goal/objective description}	{insert Date of completion}

Long Term goals:

[Guidance: What are three primary long-term goals for your business (1-3 years)?]

Goal/Objective	Description	By when
{insert Goal/Objective name}	{insert Brief goal/objective description}	{insert Date of completion}

Products:

[What are the types of products you sell? Use broad terms here, but describe the sections of your menu. Describe what your value proposition is. What is it about your products/venue that would want to make people choose you.]

Financial Analysis:

[In this section provide a high level analysis of your current financial situation, specifically addressing sales and profitability.]

Part 1 – Sales Analysis

Give a general outline of our current sales

Part 2 – Profitability Analysis

Give an outline on your current profitability

SWOT analysis

[Use the table below to list each of your **business's** Strengths, Weaknesses, Opportunities or Threats (S.W.O.T.). It's important to be honest.]

Strengths	Weaknesses
Great chef with unique skills We make great coffee	Décor is old We don't update our menu enough
Opportunities	Threats
Thursday nights are slow	There's a new venue being setup 3 doors away

Marketing Objectives

Goals/objectives:

[Your objectives may be financial, with a goal to increase sales, marketing focused, to build awareness of your product or service, or online, to build engagement with online customers and business networks. Use the SMaRT rule for Goal setting.]

To make sure your goals are clear and reachable, each one should be:

- Specific (simple, sensible, significant).
- Measurable (meaningful, motivating).
- Achievable (agreed, attainable).
- Relevant (reasonable, realistic and resourced, results-based).
- Time bound (time-based, time limited, time/cost limited, timely, time-sensitive).
 - Examples of SMART marketing objectives
 - To achieve a 20% return on capital by April 2023 (Profitability Objective)
 - To gain 15% of the market for pizza sales by November 2025 (Market Share Objective)
 - To make Better Pizza the preferred brand of 21-29 year old's in Auckland by October 2023 (Branding Objective)]

Marketing Strategy

Your strategy and marketing mix:

[Discuss your strategy and marketing mix ([The 7 P's](#)) you will use to position yourself within the market to meet your customers' needs and therefore reach your goals.]

Whatever your strategy, aiming to differentiate yourself from your competitors to encourage customers to choose your business first is the most common approach but consider your venues goals.]

Marketing Activities

[Once you have defined your marketing mix, the next step is to detail the specific activities that you will undertake to achieve your marketing objectives. As you create these activities, keep referring back to your marketing mix – it will help you to assess which activities are worth the time and effort to implement. This is the fun part, so be creative. Things to start with should include what you are already doing.]

Consider:

- Social media
- Paid social media advertising
- PR work – getting in the paper
- Google ads
- SEO
- Website development
- Flyers
- Newspapers
- Lists such as top 50 restaurants etc
- Menulog / First Table/ Restaurant Hub etc
- Promotions
- Events
- Extra services – such as takeaway or take home retail
- Merchandise
- Sponsorship of local sports teams / community groups
- Billboards & posters
- Window signs

Detail each activity below and make sure to include:

- Description
- Person responsible for completing
- Date of completion
- Cost
- How to measure
- What goal it aims to achieve

Example:**Social Media Ad's:**

Mark, owner

Setup by March 202x

Budget: \$500

How to measure?: How many extra follows we get, how many clicks to our website for bookings or info. For \$500 spend we hope to have an extra 100 customers book over a 4 week period.

Description:

Using our current branding run 3 sets of Facebook adds promoting weekend brunches. Using targeting to the local region, and our desired target market parameters. They will be linked through to our website so people can make a booking or look at our menu. Specifics are located in the promotions folder

Goal:

This action aims to support the goal of brand exposure and sales growth.

Your Finances

Marketing Budget (YEAR)

[To complete a marketing budget, you should rely heavily on your financial statements and projections. Make sure you allocate money for marketing expenses that are realistic and don't allow activities to distort other areas of your finances like cost of goods etc. This is a common mistake and if not taken into consideration marketing activities like free meals and discount can heavily effect the profitability and quality of your offering.]

Organisational Implications

[Organisational implications are often overlooked when business owners tackle a marketing plan. For example, if your goal is to increase your customer base by 15%, do you need more staff to cope? Could you outsource some tasks? It's important to consider and document these decisions in your plan.]

Monitoring/ measurement activities

[Reviewing the impact of your marketing should be a regular activity. List the details of each review below.]

Supporting documentation

[Attach any supporting documentation in relation to this marketing plan.]