

One-year marketing plan

How to use it: Start from your Situation Assessment. Keep this plan to a few pages; a plan nobody reads is a wish list. Fill in each section, put the calendar on the wall, and review it on the rhythm in section 8. Change the plan when the facts change, not when you're bored.

Worked examples use **"Northbound Oat Co." — a fictional oat-milk brand**. Not a real company.

1. Objectives

- What 2 to 3 business results do you want this year? Make them measurable.
- How does marketing contribute to each one?

Fictional example: Get listed in one new grocery banner and grow repeat purchase in current stores.

2. Target

- Who exactly are you going after? Primary and secondary.
- Shopper, consumer, retail buyer, foodservice operator: who matters for each objective?

Fictional example: Primary — plant-based milk buyers who switch on promo. Secondary — independent cafés.

3. Positioning

- For [target], [brand] is the [category] that [benefit], because [reason to believe].

Fictional example: For busy parents, Northbound is the oat milk that actually tastes like oats, because it's made with fewer ingredients.

4. Strategies

- 3 to 4 big moves to hit your objectives. Each one: what, why, which channel.
- What are you choosing not to do?

Fictional example: Win trial in-store with sampling and promo; we will not chase national listings this year.

5. Tactics by channel

Channel	Tactics	Owner	Timing
Retail (in-store, flyer, retailer media)			
Direct to consumer (your site, email, subscription)			
Foodservice			
Social and press			
Trade / sales support			

Fictional example (Retail): Two flyer slots, one display period, in-store demos in top stores.

6. Calendar

Month	Seasonal moments	Retail / trade	Direct to consumer / social	Other
Jan				
Feb				
Mar				
Apr				
May				
Jun				
Jul				
Aug				
Sep				
Oct				
Nov				
Dec				

Fictional example: Back-to-school in late summer is our peak; we book flyer and display around it.

7. Budget

Bucket	Amount	% of total	Notes
Trade spend (promo, listings, displays)			
Media			
Content and production			
Agency / freelance fees			
Sampling and events			
Reserve (keep some!)			

Fictional example: Most of the budget goes to trade spend and sampling; a small reserve stays unspent until midyear.

8. Key numbers and review rhythm

- 3 to 5 key numbers tied to your objectives. Where does each number come from?
- Weekly: what do you glance at? Monthly: what do you review? Quarterly: what could change the plan?

Number	Target	Source	Checked

Fictional example: Repeat purchase rate from direct-to-consumer data, checked monthly; retail sales from retailer reports, checked weekly.

9. Risks and plan B

- What could blow up the plan, and what will you do if it does?

Fictional example: If the new listing slips, move that budget to deeper support in existing stores.