

## Sample Sales and Marketing Plan

| GOAL   | TARGET   | STRATEGIES  | TACTICS/MESSAGES  | CALENDAR   | MEASUREMENT  |
|--|--|---|---|--|--|
| <i>Specific, measureable objectives to be accomplished in a time period.</i> | <i>Specific, reachable segments of people with similar needs or interests, motivations, demographics, locations, etc. How many organizations/people are there in each segment?</i> | <i>Strategies that will attract the specific people or organizations you're trying to reach with a compelling offer that meets their interests/needs.</i> | <i>Tools or channels you'll use to reach your targets. What's unique or special about your product/services/bio/history that will connect with people? Which messages will be persuasive?</i> | <i>Specify which activities you will do daily, weekly, monthly or quarterly to achieve your goals.<br/><br/>What time of day or day of week is most effective for each activity?</i> | <i>How will you track results? How will you compare the effectiveness of each tactic? How will you calculate time/money/# of contacts it takes to attract/retain each customer/client?</i> |

| Sample Goal #1   |                                 |  |   |   |  |
|--|---------------------------------|--|---|---|--|
| Get 10 people from my neighborhood to join my micro-CSA. | Neighbors in four-block radius. | <p><b>Invite your neighbors</b> to a local foods tasting party previewing what you'll be offering in the CSA.</p> <p><b>Stage a family-friendly</b> event for neighbors at your farm.</p> <p><b>Go door-to-door</b> to solicit members, dropping off samples and asking what vegetables they like.</p> | <p><b>Channels:</b> Door-to-door, flyers, attend and hold events, website and/or Facebook page, email lists.</p> <p><b>Message:</b> "This morning's harvest, delivered to your door."</p> | <p>Daily activities during key sign-up period. (If not fully subscribed, keep up with weekly outreach until full.)</p> <p>Send weekly emails to CSA members with product info, recipes, and invites.</p> <p>Hold potluck or member event midway and at end of summer.</p> | <p>Total sales</p> <p>Marketing costs (printing, free samples, events, etc.)</p> <p>Net income</p> <p>How members heard about it</p> <p>Satisfaction (send online survey and/or interview each member)</p> <p>Retention rate</p> |

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| <b>Sample Goal #2</b>                                    |   |   |   |   |  |
| Sell at least \$500 of goods at my farm stand each week. | People who live or work in in area.   | <p><b>Get on neighborhood listservs and websites.</b></p> <p><b>Partner with local restaurants, stores and businesses.</b> Do cross-marketing.</p> <p><b>Visit your local elementary school,</b> or invite the class to visit your farm.</p> <p><b>Sponsor and attend</b> community events.</p> <p><b>Hold Farm Days.</b> Offer tours, gardening lessons, free samples.</p> | <p><b>Channels:</b> Signage, Door to door outreach, postcards/flyers, website, Facebook, Twitter, eNewsletter.</p> <p><b>Run Facebook ads</b> targeted to your zip code. (If you can't pay for Facebook ads, promote a local event through Facebook.)</p> <p><b>Offer weekly specials</b> and recipes via your eNewsletter or Facebook.</p> <p><b>Message:</b> "As fresh as if you grew it yourself."</p> | <p><b>Daily/weekly</b> web and social media posts and updates with what's in season, recipes, shout outs to other local businesses, photos of funny-looking veggies.</p> <p><b>Daily/weekly.</b> Make sure signage is visible when farm stand is open.</p> <p>Weekly emails.</p> <p>Monthly events.</p> <p>Paid Facebook campaigns as needed.</p> | <p>Total sales</p> <p>Total # of customers</p> <p>Average sales per customer</p> <p>Marketing and promotion costs</p> <p>How people hear about you</p> <p>Which types of Facebook and web posts get the most engagement</p> <p>Which times of day postings get the most engagement</p> |
| <b>Sample Goal #3</b>                                    |   |   |   |   |  |
| Get 3 wholesale accounts for my honey                    | <p>Food stores, bakeries, restaurants, and coffee shops in your neighborhood.</p> <p>Large businesses or nonprofits based in your neighborhood.</p> | <p><b>Bring free samples and a price list</b> to each business.</p> <p><b>Offer to hold in-store demos &amp; promote their business or cause</b> to your customers.</p>   | <p><b>Channels:</b> Door-to-door, postcards, events, website, social media, local listservs.</p> <p><b>Messages:</b> "Enjoy honey from your local bees."</p>  | <p>Weekly sales calls to get accounts.</p> <p>Daily social media posts about your honey, local food, &amp; recipes to build customer loyalty.</p>   | <p># of contacts made</p> <p># of new accounts and how you acquired them</p> <p>Profit after expenses</p> <p>Weekly turnover</p>   |