

Project Marketing Plan Template

Rural Health Network Development Program Technical Assistance

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BACKGROUND AND PURPOSE

Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are a leading technical assistance and knowledge center in rural health. In partnership with The Center, RHI enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing technical assistance (TA) to the Rural Health Network Development grantees through a contract with the Federal Office of Rural Health Policy (FORHP).

Sustainability of grant funded programs is a goal of FORHP funding. Having a Marketing Plan in place is critical to developing success and sustainability of the project. A Marketing Plan will help a network understand who the potential target markets are for product and services and identify how to best convey messages. There is an evaluation element of the marketing plan as well to understand its effectiveness.

This *Project Marketing Plan Template* was created to provide support to Rural Health Network Development grantees in writing an effective marketing plan by following a participative planning event as outlined in the *Marketing Plan Guide*.

This template is designed for use in conjunction with the *Marketing Plan Guide* for Rural Health Development Networks. For samples of the completed marketing plan components reviewed in the guide and template, see the *Project Marketing Plan Samples* for Rural Health Development Networks document.

This toolkit is supported with an educational [Principles of Marketing: Preparing for Marketing Planning](#) webinar recording and podcasts available on RHI's website.

Content for this Project Marketing Plan Template and the accompanying *Marketing Plan Guide* is based on RHI's June 2018 Principles of Marketing Webinar, developed by Dr. Stephen Castleberry, Marketing Professor at University of Minnesota, Duluth, and [Value Proposition Designer](#), December 2016.

INSTRUCTIONS

Although a specific template for the marketing plan is not required as part of the Rural Health Network Development grant deliverable, the following components are recommended:

- Network and Project Overview
- Target Market
- Marketing Plan Goals
- Marketing Mix
- Marketing Evaluation Plan
- Secondary Target Market
- Key Initiatives and Next Steps

There is no single correct way to present a marketing plan. We offer this template to provide your network with ideas and a starting point as you make decisions about creating your report. To use this template for documenting your network's strategic plan, complete the following steps:

- I. Revise the cover page to display the appropriate network/program information including: name, location, authors of the report and the date.
- II. Remove the Background and Purpose section and the Instructions section on pages 1 and 2 of this template document.
- III. Change the headers and footers to reflect your network name.
- IV. Complete the sections provided with relevant information in the form of narratives, tables, diagrams and charts as appropriate. Remove the instructions prior to the table.
- V. Update the Table of Contents to reflect your new content language and layout.

NETWORK AND PROJECT OVERVIEW

Insert your network's mission, vision and project goals from previous plans.

Network and Project Overview
Network Vision:
Network Mission:
Project Goals: <i>(from Strategic Plan)</i> 1. 2. 3. <i>(add more numbers as needed)</i>

TARGET MARKET

List all market segments identified in prework, on page 6 of the Product and Service Designer worksheet. List in rank order, with the most important at top.

Provide a summary of your primary target market's characteristics by returning to your Product and Service Designer Worksheet (Appendix C). Select your primary target market's jobs or tasks from the list on page 2 of the worksheet. Then identify the pains and gains associated with the target market from page 3 of the same worksheet.

Market Segments
1. (Primary Target Market)
2.
3.
4. <i>(add more numbers as needed)</i>

Primary Target Market Characteristics	
Demographics:	<ul style="list-style-type: none">•••
Jobs:	<ul style="list-style-type: none">•••
Pains:	<ul style="list-style-type: none">•••
Gains:	<ul style="list-style-type: none">•••

MARKETING PLAN GOALS

List your marketing plan goals, and for each marketing goal, indicate the project goal associated with it.

Remember that every Project Goal may not have a marketing goal.

Marketing Plan Goal:	Associated Project Goal Number
1.	
2.	
3. <i>(add more numbers as needed)</i>	

MARKETING MIX

Products and Services: Existing

For each *existing* product or service listed on the Value Proposition Worksheet (Appendix C) Step 4: Find the Fit, describe how the product or service meets target market needs by alleviating pains or creating gains.

Existing product or service	How does this product or service meet member needs?

Products and Services: New

If any *new* products or services are listed in Step 4: Find the Fit, describe how each product or service meets primary target market needs by alleviating pains or creating gains.

New product or service	How does this product or service meet member needs?

Promotion: Key Messages

A key message is a statement of value from your target market perspective. How does the particular product or service address the pains and gains?

For each existing and new product or service listed on page 7, create at least one key message that would be meaningful to your primary target market. Specify the method(s) that will be used to deliver each message.

Product or Service	Key Message	Delivery Method(s)

Place: Product or Service Delivery

Place defines the methods used to deliver products and services and the timing of the delivery of the product or service. Note that this is about the actual delivery of the product and services themselves, NOT about ways to promote products and services.

Infrastructure

Briefly describe the infrastructure of the Network that supports operations (i.e., the "guts" or inner workings that make product/service delivery possible.

Delivery Mechanisms

Briefly describe the mechanism(s) used to deliver Network products/services.

PRICING

This section is OPTIONAL. If you already know how you will price your products and services to ensure sustainability, describe your plan here. If you have not yet created a financial plan, leave this section blank. You'll have the opportunity to share your financial plan when you submit your business plan (due July 31, 2019).

MARKETING PLAN EVALUATION

Transcribe each of your marketing goals (located on [page 7](#) in this template). For each goal, provide:

What: Measurements that provide evidence of achievement, or success, for marketing goals

- Describe the measure (Quantitative and/or Qualitative)
- Provide a specific target or benchmark comparison
- Define how the measure will be calculated
- Identify the method of data collection

When: Identify timing, or frequency, of data collection (i.e. baseline, quarterly, annually, funding cycle etc.)

Who: Identify individual responsible for data collection. This person ensures accuracy and confidentiality (if applicable).

Marketing Goal	What				When	Who
	Output or Outcome Measure Description	Target	Measure Definition	Data Collection Method	Data Collection Frequency	Person Responsible for Data Gathering

SECONDARY TARGET MARKET

List your second-priority market segment (located on [page 6](#) in this template) and describe the ways that a marketing plan for this market segment might look different than the plan for your primary target market.

Secondary Target Market	
Market Segment:	
Different Strategies:	<ul style="list-style-type: none">•••••

KEY INITIATIVES AND NEXT STEPS

Identify the actions needed to further implement this marketing plan.

Action	Person Responsible	Deadline for Completion