A close up of a flower

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**SMALL BUSINESS   
MARKETING PLAN EXAMPLE**

MARKETING PLAN

City Roast Collective

123 River Street

City, State and Zip

Phone: 000-000-0000

webaddress.com

Version 0.0.0

date: mm/dd/yy

|  |  |  |
| --- | --- | --- |
| PREPARED BY | TITLE | DATE |
| Paul O’Neill | Marketing Lead | MM/DD/YY |
| EMAIL | | PHONE |
|  | |  |
| APPROVED BY | TITLE | DATE |
| Hilda C. | Founder and CEO | MM/DD/YY |

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# BUSINESS SUMMARY

## OUR COMPANY

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| City Roast Collective is a distinguished coffee shop and roastery nestled in the vibrant heart of Seattle, a metropolis renowned for its dedication to organic, fair-trade coffee. Since its inception in 20XX, we have established ourselves as a new local favorite in the Seattle coffee scene. We are now known for celebrating the city's rich coffee culture. Our expertise lies in two areas: crafting unique blends and single-origin coffees; and creating a modern and inviting space for community events and coffee education that’s tailored to Seattle's dynamic and discerning coffee community. |

## MISSION STATEMENT

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| Our mission is to enrich Seattle's renowned coffee culture by offering exceptional, sustainably sourced coffee. Our focus is on delivering an extraordinary coffee experience that reflects our commitment to environmental stewardship and fair-trade practices. As a community-centric coffee hub, we strive to foster a deeper appreciation for the art of coffee in the heart of Seattle. |

## VISION STATEMENT

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| Our vision is to become a beacon in Seattle's coffee landscape, known for our unwavering commitment to quality, sustainability, and community. We envision City Roast Collective as expanding to more locations, establishing its influence as a leader in the coffee industry, setting new benchmarks for environmental responsibility and customer satisfaction, and becoming a cherished part of Seattle's vibrant urban fabric. |

# THE CHALLENGE

## PROBLEM

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| * Seattle's coffee market is highly competitive, with numerous established coffee shops and roasteries. Standing out in this crowded space is a significant challenge. * The high density of coffee shops in Seattle means that most neighborhoods are already served by multiple coffee outlets, making it difficult to find underserved areas or untapped markets. * Seattle's coffee drinkers are known for their sophisticated tastes and high expectations regarding coffee quality and sustainability practices, posing a challenge in consistently meeting these standards. |

## OPPORTUNITY

|  |
| --- |
| * There is an increasing consumer trend toward supporting environmentally sustainable and ethically sourced products. This sentiment aligns with City Roast Collective’s core values. * Seattle's discerning coffee drinkers provide a lucrative niche market for high-quality, artisanal coffee experiences. * By positioning itself as a community hub, City Roast Collective can create a loyal customer base and differentiate itself from competitors that focus purely on transactions. |

# SITUATIONAL ANALYSIS

## 5C ANALYSIS

### *COMPANY*

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| * City Roast Collective focuses on high-quality, organic, and fair-trade coffee. * The company is distinguished by its commitment to sustainability and community engagement. |

### *COLLABORATORS*

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| * We collaborate with local organic farmers and fair-trade suppliers. * We partner with local businesses for cross-promotion and community events. * We have wholesale partnerships with restaurants and retailers who stock our beans. |

### *CUSTOMERS*

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| * Our target customers are environmentally conscious, quality-focused coffee drinkers in Seattle. * The customer base includes both regular local patrons and visitors seeking a unique coffee experience. |

### *COMPETITORS*

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| * City Roast Collective faces competition from other specialty coffee shops and larger chains in Seattle. * The competitive edge lies in the shop's focus on sustainability, community involvement, and unique coffee offerings. |

### *CLIMATE*

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| * The market trend favors environmentally sustainable and ethically sourced products. * Seattle's vibrant coffee culture provides a fertile ground for coffee businesses but also demands continuous innovation and high-quality offerings. |

## SWOT ANALYSIS

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| --- | --- |
| INTERNAL FACTORS | |
| STRENGTHS (+) | WEAKNESSES (-) |
| * High-quality, organic, and fair-trade coffee that appeals to conscious consumers. * Strong brand identity that focuses on sustainability and community engagement. * Prime location in Seattle, a city known for its rich coffee culture. * Skilled baristas who offer unique coffee experiences and education. * Strong online presence, including engaging website and active Instagram. | * Newer entrant in market with well-established competitors. * Limited brand recognition outside of immediate Seattle area. * Higher price point due to quality and sustainability commitments. * Reliance on local foot traffic in highly competitive area. * Limited marketing budget compared to larger coffee chains. |
| EXTERNAL FACTORS | |
| OPPORTUNITIES (+) | THREATS (-) |
| * Growing consumer interest in sustainable and ethically sourced products. * Potential to expand offerings (e.g., baked goods, coffee accessories). * Opportunities to collaborate with local businesses and community organizations. * Expanding market reach through online sales of coffee beans. * Leveraging Seattle's tourism industry to attract new customers. | * Intense competition from established coffee shops and national chains. * Fluctuations in global coffee market, affecting bean prices. * Changing consumer trends and preferences in coffee industry. * Potential economic downturns that impact consumer spending on premium products. * Environmental concerns that impact coffee production globally. |

# CORE CAPABILITIES

### CAPABILITY ONE

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### CAPABILITY TWO

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### CAPABILITY THREE

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# MARKETING GOALS

## SHORT-TERM GOALS AND ACTION PLAN

### *LEVERAGE EXISTING CUSTOMER BASE*

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### *EXTEND REACH*

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## LONG-TERM GOALS AND ACTION PLAN

### *BRAND AWARENESS / AUTHORITY*

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### *IMPROVED SEARCH RANKING*

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# TARGET MARKET

## DEMOGRAPHICS

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## PSYCHOGRAPHICS

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# MARKETING STRATEGY

## UNIQUE SELLING PROPOSITION (USP)

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## MARKETING MIX – 4Ps

### *PRODUCT*

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### *PRICE*

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### *PLACE*

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### *PROMOTION*

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## MARKETING CHANNELS

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## BUDGET

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| Digital Marketing (30% of total budget):   * Social Media Advertising: $6,000 * Search Engine Marketing: $4,000 * Content Creation (blog, SEO): $5,000 * **Total: $15,000**   Local Marketing (20% of total budget):   * Flyers and Posters: $2,000 * Local Events Sponsorship: $3,000 * Community Collaborations: $2,000 * **Total: $7,000**   Public Relations (15% of total budget):   * Media Outreach: $3,000 * Press Release Distribution: $1,500 * Influencer Collaborations: $2,500 * **Total: $7,000**   Direct Marketing (10% of total budget):   * Email Marketing Campaigns: $2,000 * Loyalty Program Development: $1,000 * Direct Mail: $1,000 * **Total: $4,000**   E-Commerce Development (15% of total budget):   * Website Enhancement: $3,000 * Online Store Setup: $3,500 * E-Commerce Advertising: $2,500 * **Total: $9,000**   Wholesale Marketing (10% of total budget):   * B2B Marketing Materials: $2,000 * Trade Shows Participation: $2,000 * Wholesale Client Outreach: $1,000 * **Total: $5,000**   **Total Marketing Budget: $47,000** |

# PERFORMANCE STANDARDS AND MEASUREMENT METHODS

## STANDARDS OF PERFORMANCE

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## KEY PERFORMANCE INDICATORS (KPIs)

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## METHODS OF MEASUREMENT

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# FINANCIAL SUMMARY

## FINANCIAL REQUIREMENTS

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## ASSUMPTIONS / PROJECTIONS

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## FINANCIAL STATEMENTS

### *INCOME STATEMENT*

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### *CASH-FLOW PROJECTION*

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### *BALANCE SHEET*

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# APPENDIX

## RESEARCH RESULTS

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## PRODUCT SPECIFICATIONS AND IMAGES

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