



Excel Template Preview

- Market Growth Projections
- Competitor Growth & Market Share
- Current Sales Analysis
- Project Milestones
- Break-even Analysis
- Sales Forecasts
- Cost of Sales Forecasts
- Marketing Budgets
- Sales vs. Expenses Comparison

Microsoft Excel - Marketing Plan Success.xls

Budget Charts
Marketing Plan Success Version 2
Financials, Budgets, & Forecasts

Marketing Expense Projections Worksheet

What to do:
Fill in the information for the budget planning if you are using it. Enter the marketing costs information for each month over current year sales and enter the required information. Sales projections are used from the sales forecast worksheet.

Where the data go:
This data is used to build the expense budget chart and graphs.

Optional for Budget Planning:
If you would like to use a percent of sales method for determining your marketing budget, you can use these charts for planning and balancing the budget based on current year sales projections or previous year sales projections.

	0	1
	Allocated	Budgeted
%Gross Sales Allocated to Marketing Budget	\$0	\$0
Difference:	\$0	\$0

	0	1
	Allocated	Budgeted
Previous Year Gross Sales	\$0	\$0
%Gross Sales Allocated to Marketing Budget	\$0	\$0
Difference:	\$0	\$0

	January	February	March	April	May	Jun
Marketing Costs						
Television Ads						
Newspaper Ads						
Pay-per-click/Internet Ads						

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Current Sales Analysis Chart
Marketing Plan Success Version 2.0
Situation Analysis

Current Sales Analysis Worksheet

What to do:
Enter the total market sales from the previous year for each month. Enter the total monthly sales for your product for the year.

Where the data go:
This information is used to build the Current Sales Analysis chart and Last Year Industry Sales Graph.

	Jan	Feb	Mar	Apr	May	Jun	Jul
Market Sales for Previous Year:	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Your Product Sales for Previous Year:	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Competitor Sales for Previous Year:	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Linked Charts

This chart is linked directly to your Marketing Plan. You can make changes to the charts appearance in your Word document of the chart below. You can also make modifications to the number of market segments by deleting the extra rows in this section.

If you are unable to update the link to this chart in your marketing plan, the link may be broken. You can repair or modify the instructions in the User's Guide. Changing the column width in this spreadsheet will affect the appearance in the Word document.

Chart: Current Sales Analysis
In Thousands of Dollars

	Jan	Feb	Mar	Apr	May	Jun
Total Sales for Company	\$0	\$0	\$0	\$0	\$0	\$0
Total Sales for Competition	0	0	0	0	0	0
Total Market Sales	\$0	\$0	\$0	\$0	\$0	\$0

	Jul	Aug	Sep	Oct	Nov	Dec
Total Sales for Company						

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Market Growth Projections Worksheet

What to do:
Enter the population of your target market for each year. Enter the growth rate for each year. Enter the market share for each year. Enter the market share for each year. Enter the market share for each year.

Where the data go:
This information is used to build the Market Growth Projections chart and graphs.

Market Segment	Year 1	Year 2	Year 3	Year 4	Year 5
Market Segment 1					
Market Segment 2					
Market Segment 3					
Market Segment 4					
Total					

Linked Chart

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Chart: Market Growth

Market Segment	2006	2007	2008	2009	2010	Count
Market Segment 1						
Market Segment 2						
Market Segment 3						
Market Segment 4						
Total						

Graphs

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Market Segments

Just enter your information into the worksheets and the template does the rest!