

Practical guide: Build a marketing plan for your business

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MARKETING PLAN



TARGET AUDIENCE
Professionals
28–45



CHANNELS
Digital • Social
Email • Content



BUDGET
\$850,000
Q2–Q4



TIMELINE
Apr – Dec 2025



CONVERSION
3.6%
(+12% vs Q1)



What a marketing plan is for

A marketing plan is the document that says what your marketing will achieve this year, what you will do each quarter to achieve it, what that costs, and how you will know whether it worked.

It sits between the strategy and the diary. The strategy decides who you are for and why they should choose you, and changes rarely. The plan turns those decisions into dated activity and a budget, and is rewritten every year.

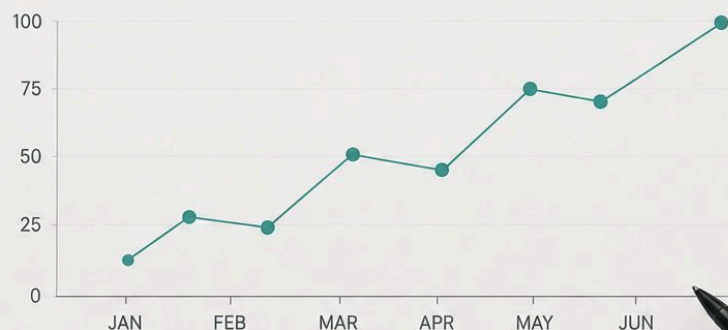
A working plan for a small business fits on a few pages. The one-page version at the back of this guide is enough to run a year on.

What it is not

It is not a wish list. An objective without a budget and an owner is a hope, and hopes do not belong in the plan.

The budget spreadsheet records what you spend. The plan says why you are spending it, and what the money has to produce.

It is not fixed. The objectives hold for the year; the tactics under them should change the moment the numbers say they are not working.



12.650
Clients



98%
Retention



+82%
Growth

What happens without a plan

Most small businesses do their marketing without one. These are the four costs of that, seen from inside the businesses I work with.

Without a plan, the budget follows the loudest voice

Spend drifts towards whoever asked last: the agency with a new idea, the platform with a promotion, the channel the owner personally enjoys. A written plan is the polite way to say no, because every new idea has to displace something already on the page.

Activity replaces progress

A business without a plan measures marketing by how busy it looks. Posts go out, events are attended, money is spent, and at the end of the year nobody can say what changed. The plan replaces "what did we do" with "what did it produce".

The balance tips towards this month's sales

Les Binet and Peter Field's analysis of the IPA Effectiveness Databank (The Long and the Short of It, 2013) found that activity building the brand for future buyers drives most long-term growth, with a recommended balance near 60 per cent brand and 40 per cent sales activation for many categories. Without a plan, almost every business drifts to activation, because it is the half that shows up this month.

Nobody can hold anyone to anything

A plan with objectives, owners and dates is what lets you manage marketing like the rest of the business. It is also what makes an agency manageable: their brief is the plan, and their review is the numbers on it.



The six questions a plan must answer

The clearest planning structure I know is PR Smith's SOSTAC, in use since the 1990s. It is six questions, answered in order. Each answer should fit in a few sentences or a short table.

1 · Where are we now?

Last year's revenue, customers, average sale, repeat rate, enquiry sources and marketing spend, plus the two or three things the market is doing that affect you. One page of honest numbers. If you cannot fill this page, fixing the measurement is the first item in the plan.

2 · Where do we want to be?

Two or three objectives, each a number with a date, and each traceable to revenue: enquiries, conversion, average sale, repeat rate. "Grow awareness" is not an objective until it says among whom, by how much and by when.

3 · How do we get there?

The strategy in one paragraph: which customers you will win, with which proposition, at which price, through which few channels. If you have worked through the first two guides in this series, this paragraph is already written.



The six questions, continued

4 · What exactly will we do?

The tactics: the campaigns, content, events and offers, quarter by quarter, each with a cost and the objective it serves. Fewer channels run properly beat many run thinly. For most small businesses three channels done well is the ceiling.

5 · Who does what, and when?

Every line of the tactics gets an owner and a date, whether that is you, a member of staff or the agency. This is the page that turns the plan from a document into a management tool.

6 · How do we know it is working?

Three to five measures with today's figure beside each, reviewed monthly against the objectives. Fixed definitions, agreed with whoever runs the money. The review is thirty minutes a month, and it is the part that keeps the other five questions honest.

The plan on a page

Situation	One page of honest numbers
Objectives	Two or three, each a number with a date
Strategy	One paragraph: who, proposition, price, channels
Tactics	Quarter by quarter, costed, tied to objectives
Action	Owners and dates on every line
Control	Three to five measures, reviewed monthly

A plan that answers all six questions on a few pages beats a forty-page document nobody opens after January.



Actions to build your plan

01

Write the one page of honest numbers

Revenue, customers, average sale, repeat rate, enquiries by source, and marketing spend for the last year. Mark every figure you had to guess.

The guesses are your measurement gaps, and closing them goes into the plan.

02

Set two or three objectives

Each one a number with a date, each traceable to revenue, each agreed with whoever runs the money.

Work backwards from the revenue target: how many customers, from how many enquiries, at what conversion rate.

03

Write the strategy paragraph

Which customers, which proposition, at what price, through which channels. Pull it from your brand strategy and proposition if you have done that work.

If you cannot write this paragraph, stop and do the first two guides in this series before spending anything.

04

Choose your few channels

Pick the two or three where your customers already look, using the enquiry sources from step one as evidence rather than instinct.

Write down what each channel must produce to keep its budget next year, and what would get it cut.

Actions to build your plan

05

Set the budget and the balance

Decide the year's marketing budget as a figure, in AED or GBP, and split it between brand building and sales activation deliberately, with Binet and Field's 60 to 40 as the starting point to adjust from.

Whatever split you choose, write down why, so next year's argument starts from a decision rather than a habit.

06

Build the quarterly calendar

Place the tactics on a four-quarter calendar with a cost and an objective against each. Load around your seasonal peaks, including Ramadan and summer if you trade in the Gulf.

Leave 10 per cent of the budget unallocated for what you cannot predict.

07

Put an owner and a date on every line

Name who delivers each line, including the lines the agency owns. Anything without an owner comes off the plan.

Share the finished plan with everyone named on it, in one meeting, so the commitments are public.

08

Book the monthly review now

Thirty minutes, same day each month, measures on one page. Change tactics freely when the numbers say so. Change objectives only with the same people who set them.

Twelve of these meetings are the difference between a plan and a document.

A worked example

A made-up commercial cleaning company in Manchester, twelve staff, GBP 800,000 turnover, growth flat for two years. The names and figures are invented; the shape of the plan is typical.

The situation page said

Ninety per cent of revenue from eleven contracts. Two contracts were 40 per cent of revenue, both up for renewal within eighteen months. Enquiries: referrals first, the website a distant second, paid search producing clicks and nothing else. Marketing spend GBP 21,000, most of it on the paid search that produced nothing.

The objectives

Six new contracts above GBP 30,000 a year by December. Both anchor contracts renewed. Referral enquiries doubled, because the evidence said referrals convert at four times the rate of anything paid.

The strategy paragraph

Office and clinic managers in south Manchester who need cleaning they never have to chase, at a mid-market price, won through referrals, the client list and a rebuilt website, with paid search cut entirely.

The tactics that made the cut

A referral thank-you scheme for existing clients. A quarterly building-manager breakfast. Case studies with the three best-known clients. A website rebuilt around the proposition, "cleaning you never have to chase", with the service guarantee published. Quarterly review visits to the two anchor contracts, owned by the managing director personally.

The control page

Five measures: enquiries by source, quotes issued, win rate, revenue from new contracts, and the renewal status of the two anchors. Reviewed on the first Tuesday of each month.

The point

The budget barely changed. It moved from a channel that produced clicks to the referral engine the situation page said was already working. That reallocation is what a plan is for.



The one-page marketing plan

Print this page or copy the headings into a document. Answer the six questions in order; keep every answer short enough to say aloud.

1 · SITUATION: THE HONEST NUMBERS FROM LAST YEAR

2 · OBJECTIVES: A NUMBER AND A DATE, EACH TRACEABLE TO REVENUE

3 · STRATEGY: WHO, PROPOSITION, PRICE, CHANNELS, IN ONE PARAGRAPH

4 · TACTICS BY QUARTER, EACH COSTED

5 · OWNERS AND DATES

BUDGET: TOTAL, AND THE BRAND TO ACTIVATION SPLIT

6 · CONTROL: MEASURES, TODAY'S FIGURES, REVIEW DAY

Mistakes to avoid and measures to keep

Six mistakes I see most often

- ☐ Objectives that are activities: "post three times a week" is a task.
- ☐ Too many channels, each funded too thinly to work.
- ☐ All the budget on this month's sales, nothing building next year's.
- ☐ No owner on the line, so the plan describes work nobody does.
- ☐ Writing the plan in January and reading it again in December.
- ☐ Copying last year's plan with the dates changed.

Measures, chosen from these

Three to five, fixed definitions, today's figure recorded before the plan starts.

Enquiries by source	Enquiry form, call notes, analytics
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Quotes issued and win rate	Sales records
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Cost per qualified enquiry	Spend against the enquiry count
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Average sale and repeat rate	Accounts or CRM
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Branded search volume	Google Search Console, monthly
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Sources

PR Smith, SOSTAC: the guide to the perfect digital marketing plan (the framework dates from the 1990s and is used with attribution). Les Binet and Peter Field, The Long and the Short of It, IPA, 2013. Related guides in this series: Create a brand strategy, and Define your unique selling proposition, at ataylorcmo.com/guides.



Conclusion

A marketing plan for a small business takes about two weeks alongside the day job: one week gathering the honest numbers, one week making the decisions and writing them down.

Answer the six questions in order, put an owner and a date on every line, and hold the monthly review without fail. The review is where the plan earns its keep.

Next step

If you would like a second opinion on your plan before the year starts, I offer a 30 minute discovery call at no charge. Bring the one page and the numbers behind it.

Book at ataylorcmo.com, or write to adam@ataylorcmo.com.



Adam Taylor

MSc, FCIM, CDMP. A marketing leader with more than 20 years of international experience driving growth, market expansion and competitive positioning across luxury retail, real estate, free zones, automotive and mega-events.

I work as a fractional chief marketing officer for owners, executives and boards in the UAE, the UK and internationally. My career includes Group Head of Marketing at Emaar, Director of Events and Entertainment at Expo 2020 Dubai, and marketing leadership of a UAE free zone, with more than 5,000 events and activations delivered for premium brands.

Credentials

MSc Marketing. Fellow of the Chartered Institute of Marketing. Certified Digital Marketing Professional.

Experience

More than 20 years across the UAE, the wider Middle East, the UK and global markets.

Specialisms

Marketing strategy, brand positioning, UAE market entry, growth and marketing return on investment, events and experiential, and board governance.

Brands and organisations

Emaar · Expo 2020 Dubai · The Dubai Mall · IFZA · Al Tayar Motors · Ferrari · Gucci · Harvey Nichols · Bloomingdale's · Dolce and Gabbana

Contact

If you have a question about this guide, or want a second opinion on your marketing plan, write or call. I reply within one working day.



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Dubai, United Arab Emirates. Clients in the UAE, the UK and internationally.

Working hours

Monday to Friday, 08:00 to 18:00 Gulf Standard Time
UK appointments by arrangement

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