

MARKETING PLAN I

WHAT COMPONENTS DO I NEED TO INCLUDE IN A MARKETING PLAN?

SPECIAL NOTE: The term “product” is being used to represent what is being marketed. For a winery, this could be a bottle of wine, an event, the location, etc. For a vineyard, the product would refer to a given block of grapes. For an appellation, the product would likely be the region as well as the member vineyards and wineries in that region.

CHECKLIST OF QUESTIONS TO ANSWER:

1. Situation Analysis – Where is my vineyard, winery, appellation, and/or product now?

- Market – In what markets do I currently participate?
- Customers – Who are my customers?
- Competition – Who is my competition? Where? How?
- Environment – What regulations, cultures, traditions, etc. impact my business and products?
- Current status of my business and products?
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats

2. Objectives (overall) – Where do I want my vineyard, winery, appellation, and/or product to go in the future?

- “SMART” objectives = After I record my objectives, can I answer the following questions based upon what you have written?
 - Specific – What exactly do I want to accomplish?
 - Measurable – How will I know if I have achieved my objectives/goal?
 - Achievable – Can I really do this? Do I know what resources I will need? Are these Resources available?
 - Relevant – Is each objective important? Does it contribute to the greater vision and purpose?
 - Time-Dimensioned - When will I achieve each objective?

3. Strategies – What are the possible routes for getting to where I want to go?

4. Work Plan – Having chosen a route, what are the specific actions I need to take and when do I need to take them?

- The plan identifies specific tactics for executing the Four P’s.
 - Product
 - Price
 - Promotion
 - Place
- The plan should include the tasks for each objective, whom is responsible for overseeing the work of that task, who the audience is, the deliverable, a timeline for the work, and the anticipated costs to do the work.



5. Budget – How much will it cost to get there?

- Allocate costs to each of the objectives and tasks identified in the work plan.
- Develop an Income Statement in which the cost of the marketing campaign is identified on an incremental or marginal basis.
- Define the anticipated financial return.
- Prepare detailed proforma operational budgets. These should include a minimum-maximum range and columns for both actual numbers as well as variances from budget.

6. Monitoring & Measurement – Am I making progress towards getting there? Did I get there?

- Utilize the work plan to monitor progress.
 - By tasks
 - By timeline
 - By individuals/entities responsible
 - By deliverables
 - By budget
- Utilize the financial statements to monitor progress as well as results.



MARKETING PLAN II

HOW DO I CONDUCT A SITUATION ANALYSIS?

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CHECKLIST OF QUESTIONS TO ANSWER:

The purpose for conducting a Situation Analysis is to answer the question, “Where Am I Now?” in terms of my business and/or the products I offer. Information to answer that question can be gleaned from both secondary and primary research findings.

1. Market – In what markets do I currently participate?

- Size, sales trends, potential size.
- Existing market segments.
- Substitutes (e.g. other products, other forms of tourism/recreation, other products or activities competing for the same result, feeling, dollars, etc.).
- Macro/micro economics.
- Customer needs within the scope of the existing market.

2. Customer – Who are my customers?

- Needs (e.g. products, packaging, price, place, value)
- Profile (demographics, lifestyle)
 - Decision makers
 - Decision influencers
 - How, when, where, and why do they buy?

3. Competition – Who is my competition? Where? How?

- What are their strengths and weaknesses?
- How is the competition responding?
 - Rank by market share
 - Rank by strengths and weaknesses
 - Specifically describe their marketing mix (i.e. products, price, place, promotion)

4. Operating Environment –

- What existing and potential regulations affect my business and products (local, state, federal, international)?
- What cultures and traditions impact (positive and negative) my business and products?

5. What is the current status of my business and products?

- What is my current marketing mix (product, price, place, promotion)?
- What are my advantages and constraints?
- What are my future plans and strategies?
- How do my customers view my product and/or business (i.e. relative to competing products/businesses, by type of user, frequency of use, location of use, price, cost, value, accessibility to product/business, packaging, etc.)?



MARKETING PLAN III

WHAT DO I NEED TO ADDRESS IN THE STRATEGY I SELECT?

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CHECKLIST OF QUESTIONS TO ANSWER:

1. What products do my customers want?

2. In what form do my customers want these products?

3. How will I distribute and sell to my customers?

- Marketing Channels (e.g. brokers, distributors, restaurants, retailers, direct, on-line)
- Physical Distribution (i.e. where, how, when)

4. What price will I charge? Is that price appropriate within the structure of the marketing channels?

5. What is the purpose of the promotions I choose to employ?

- Image
- Awareness
- Encourage trial
- Repeat purchase
- Other

6. How will I promote the products to customers throughout the marketing channel?

- Personal selling
- Direct sales promotion
- Publicity
- Advertising – mass media
- Positive press
- Events
- Point of purchase materials and incentives
- Other

7. How will I communicate with my customers?

- Direct marketing
- Public relations
- Mail
- Clubs
- Web
- Newsletters
- Tasting rooms
- Advertising
- Other



Washington Guide to Sustainable Viticulture

This document provided by the Washington Wine Industry Foundation’s “Risk Management Education Program for the Northwest Grape Industry” — a USDA-RMA Partnership. For questions about VineWise, please contact the Washington Association of Wine Grape Growers at 1-877-88WAWGG (1-877-8892994) or email vinewise@wawgg.org.