



Washington Guide to Sustainable Viticulture

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 – 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 I have written?
 - **S**pecific – What exactly do I want to accomplish?
 - **M**easurable – How will I know if I have achieved my objectives/goal?
 - **A**chievable – Can I really do this? Do I know what resources I will need? Are these Resources available?
 - **R**elevant – Is each objective important? Does it contribute to the greater vision and purpose?
 - **T**ime-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 specific action, 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



RESOURCES

Developing a marketing plan

<http://www.businesstown.com/marketing/plans-plan.asp>



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