



THE SUNDAY TIMES

泰晤士报商务版

怎样策划 营销方案

How to Write a Marketing Plan

- ★ 设定营销目标
- ★ 制定营销计划
- ★ 实施整体营销方案
- ★ SET YOUR MARKETING OBJECTIVES
- ★ CREATE AN EFFECTIVE, ACHIEVABLE PLAN
- ★ IMPLEMENT THE PLAN

● 约翰·韦斯特伍德

● John Westwood

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约翰·韦斯特伍德 著
白云 译

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preface

This book is different from most business books. It is a practical workbook that will enable you to prepare your own marketing plan.

In the course of this book, you will follow the development of a marketing plan for a fictitious company - The Equipment Manufacturing Company. Step by step you will be shown how to carry out the different steps in marketing planning. Exercises help you to produce sections of your own marketing plan.

By the time you reach the end of this book, we will have completed our marketing plan and you will have completed yours.

The book can be used in many ways:

- ☐ as an individual study guide;
- ☐ for group marketing planning exercises;
- ☐ as a textbook for marketing courses.

Since the completed plan is included at the end of the book, we include the answers as well as the questions!

前 言

本书不同于其他众多书籍，它是一本可以帮你制订自己的营销方案^①的具有实际操作性的工具书。

书中设定了一个虚拟的公司——设备制造公司，你将随该公司一步步地制定一份营销方案，并了解方案制定过程中的各步骤。每章后所附练习将帮助你制定出自己的营销方案的各组成部分。

学完这本书，我们便完成了一份营销方案，同时你也完成了一份自己的营销方案。

本书适于作：自学指导；

团体营销策划的练习；

营销课程的教材。

本书不仅提出了问题，而且备有答案，那就是书末所附的一份完整的营销方案。

^① marketing plan 营销方案

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introduction

Planning is one of the most important roles of management. A company's corporate or business plan runs the business. A company's marketing plan is a key input to the business plan. It should identify the most promising business opportunities for the company and outline how to penetrate, capture and maintain positions in identified markets. It is a communication tool combining all the elements of the marketing mix in a coordinated action plan. It spells out who will do what, when, where and how, to achieve its ends.

An overall company marketing plan can be made up of a number of smaller marketing plans for individual products or areas. These smaller plans can be prepared as and when the occasion requires.

Most books on marketing planning concentrate on theory. This approach is fine for business academics but makes the whole process too complicated for the average sales manager. The approach in this book is a practical one, including only as much theory as is necessary to understand the planning process. Working your way through this book will broaden your understanding of the principles of marketing planning so that you will be able to carry out the background work necessary to put together any type of marketing plan.

It is, however, becoming more common for sales and

第一章 序 言

策划是管理部门的重要职能之一。公司是靠自己的业务或公司计划来运营的。公司的营销方案是业务计划中的一个关键组成部分。它为公司确定了最有前途的商业机会，并概述了如何对已确定的市场进行渗透、抢占和保持市场份额。作为一种连系工具，它将营销组合^①的所有要素组合成了一份协调的行动方案^②。它还指出为达到营销目的谁应做什么，以及何时、何地、如何去做。

一份完整的营销方案可能会由众多的小营销方案组成。这些小营销方案是应个别产品或部门的需要而制订的。

大部分有关营销策划的书着重于理论的叙述。这种方法有益于商业理论的学习，但整个过程的论述对于一般销售经理则过于复杂，不易掌握。而本书所介绍的方法具有可操作性，只是出于理解策划过程的需要才会运用必要的理论叙述。学习本书会加深你对营销策划的理解，从而使你能够从事编制任何营销方案所需的基础工作。

① marketing mix 营销组合

② action plan 行动计划



marketing personnel to have to put together individual plans for a product or an area very quickly. This book is designed as much to help those people as to provide guidance to marketing personnel putting together an overall marketing plan.

Throughout the book we will follow the fortunes of a company manufacturing filters and valves - The Equipment Manufacturing Company. It will be used in examples and as the basis of a marketing plan. The plan will be for all its products for its home market. To get the best out of this book, you should follow this example and prepare an equivalent marketing plan for a product for your own company as we progress through the steps one by one. By the end of the book, you will have your own marketing plan.

Adopting and following the formal structure of the plan (shown later in this book) will make it easier for you to order your thoughts and the facts logically.

It will be easier for:

- ☐ people reading the plan to follow your arguments and to see how you reached your conclusions;
- ☐ you to present a professional-looking and complete document from even a relatively small amount of information.

The Equipment Manufacturing Company is a medium-sized company based in the south of England. Key facts are given below:

Annual turnover:	£ 6m
UK sales:	£ 2m
Export sales:	£ 4m
Operating profit:	£ 1.05m
Number of employees:	65
Main products:	Valves and filters

但是一般销售和营销人员^①须迅速将某产品或部门的个别营销方案组合起来。本书也旨在帮助这些营销人员，为他们组织完整的营销方案提供指导。

本书中的设备制造公司主要生产过滤器和阀门。我们将以该公司的经历为例，并以其营销方案为基础。我们要做的是一份该公司为其国内销售的产品制订的营销方案。为了能在学习中充分受益，你应该在一步步研读示例的同时，为自己公司的产品制订一份相应的营销方案。这样，到学完这本书时，你将拥有一份自己的营销方案。

采用或遵循一套正规的营销方案结构（如书后各章所示）将更有利于你按逻辑组织思路和资料。

它还有易于：

- ☐ 方案阅读者理解你的论据及得出结论的方式；
- ☐ 帮你交出一份信息量少但看似专业的完整的报告。

设备制造公司是设在英国南部的一家中型企业，主要情况如下：

年营业额 ^② ：	6, 000, 000 英镑
在英国的销售额：	4, 000, 000 英镑
出口销售额：	4, 000, 000 英镑
营业利润 ^③ ：	1, 050, 000 英镑
雇员人数：	65
主要产品：	阀门和过滤器

① marketing personnel 营销人员

② annual turnover 年营业额

③ operating profit 营业利润

List the same information below for your own company or business unit:

Annual turnover: _____

UK sales: _____

Export sales: _____

Operating profit: _____

Number of employees: _____

Main products: _____

Before we proceed, we need to cover some basic definitions. So first of all, answer the following questions:

What is marketing? _____

How does it differ from selling? _____

What is marketing planning? _____

check your answers with the definitions given below.

现在为你自己的公司或经营单位也列一份同样的信息表：

年营业额：_____

在英国的销售额：_____

出口销售额：_____

营业利润：_____

雇员人数：_____

主要产品：_____

继续制订方案之前，我们有必要先了解一些基本概念。首先请回答以下几个问题：

什么是市场营销？_____

市场营销与推销有何不同？_____

什么是制订营销方案？_____

根据以下定义检查一下你的答案。_____

what is selling?

Selling is a straightforward concept which involves persuading a customer to buy a product . It brings in ‘today’s orders’ . It is, however, only one aspect of the marketing process .

what is marketing?

The dictionary definition of marketing is: ‘the provision of goods or services to meet consumers’ needs.’ In other words, marketing involves finding out what the customer wants and matching a company’s products to meet those requirements, and in the process making a profit for the company. Successful marketing involves having the right product available in the right place at the right time and making sure that the customer is aware of the product. It therefore brings in ‘tomorrow’s orders’ .

It is the process that brings together the abilities of the company and the requirements of its customers. Companies have to be flexible in order to achieve this balance in the marketplace. They must be prepared to change products, introduce new products or enter new markets. They must be able to read their customers and the marketplace. This balancing process takes place in the ‘marketing environment’ which is not controlled by individuals or by companies, is constantly changing and must be monitored continuously.

Marketing therefore involves:

- ☐ the abilities of the company;
- ☐ the requirements of the customer;
- ☐ the marketing environment .

The abilities of the company can be managed by the marketing organization . They can control four main elements of a company’s