# Marketing Plan Rubric

| Criteria | **Exemplary** | **Accomplished** | **Satisfactory** | **Below Expectations** | **Unacceptable** |
| --- | --- | --- | --- | --- | --- |
| Points | **20 – 19**  | **18 – 17**  | **16 – 15**  | **14 – 12**  | **11 – 0**  |
| Title Page, Table of Contents, and Company Description | The table of contents provides quick and accurate access to the topics of the plan, and includes appropriate sections and sub-sections. Company history, critical events that have affected the development of the company, recent successes, and leadership transitions are presented to create an insightful and detailed understanding of the company and the culture. Title Page conforms to APA standards. | The table of contents provides quick and accurate access to the topics of the plan, and includes appropriate sections and sub-sections. The company description highlights recent company history, as well as critical events that have affected the development of the company. Recent company successes are presented to help create an in-depth understanding of the company. | The table of contents provides quick and accurate access to the topics of the plan, and includes appropriate sections and sub-sections. The company description highlights the recent history and success of the company. | The table of contents provides access to the topics of the plan, but lacks appropriate sections and sub-sections. A brief company description is provided but lacks the detail necessary to provide an accurate understanding of the company. | The table of contents is either missing or organization does not allow for quick or accurate access to the major sections. An attempt is made to provide a company description but information is outdated or omits significant company information. |
| Strategic Focus and Plan | The current mission and vision statements of the organization are researched and presented, as well as the financial and non-financial goals of the organization. Innovative and novel suggestions to revise the mission and vision statement are offered. A comprehensive analysis of the company’s core competencies is developed to determine what sustainable competitive advantages exist. | The current mission and vision statements of the organization are researched and presented, as well as the financial and non-financial goals of the organization. Suggestions are offered to revise the mission and/or vision statement. Core competencies and competitive advantages are explored and discussed. | The current mission and vision statements of the organization are researched and presented, as well as the financial and non-financial goals of the organization. Core competencies and competitive advantages of the company are correctly identified and presented. | The current mission and vision statements of the organization are presented. Some discussion of company goals exits but is generic and unsupported. Core competencies are identified but not related to competitive advantages. | The current mission and vision statement is provided. No discussion of goals, competencies or competitive advantage exists. |
|  | **20 – 19**  | **18 – 17**  | **16 – 15**  | **14 – 12**  | **11 – 0**  |
| Situational Analysis | A SWOT analysis accurately and concisely summarizes the internal and external strengths and weaknesses of the company. The student identifies and elaborates on the critical elements of the analysis and effectively uses this information to transition to the remaining analyses. The industry analysis creates a comprehensive and broad picture of the industry and creates a platform of knowledge for further analysis. The student includes trends and predictions of the industry. A realistic and well documented competitive analysis detailing specific competitor’s strengths and weaknesses is provided and includes information regarding both direct and indirect competition. A brief company analysis that relates the company strengths and marketing strategies to mission and goals is presented. The customer analysis uses demographic and psychographic information to create an accurate and detailed understanding of the current and potential customer base, and the needs of both. | A SWOT analysis accurately and concisely summarizes the internal and external strengths and weaknesses of the company. The student identifies and elaborates on the critical elements of the analysis. The industry analysis creates a comprehensive and broad picture of the industry and creates a platform of knowledge for further analysis. A realistic and well documented competitive analysis detailing specific competitor’s strengths and weaknesses is provided. A brief company analysis that relates the company strengths and marketing strategies to mission and goals is presented. The customer analysis accurately describes both the current and potential customer base. | An adequate SWOT analysis, industry analysis, competitive analysis, company analysis and customer analysis are researched, developed and presented in a professional manner. | An attempt is made to develop the required analyses however critical information is mission from one or more analysis. The analyses are not fully developed and lack the necessary detail. | Three or less of the analyses are provided and include only cursory or inaccurate information. |
|  | **20 – 19**  | **18 – 17**  | **16 – 15**  | **14 – 12**  | **11 – 0**  |
| Market Product Focus | Product objectives are clearly identified and associated with specific target markets. Product differentiators are analyzed in depth to create a strong understanding of the clear and measurable differences of the company’s products and how they vary from competitor substitutes. Objectives, markets and differentiators are synthesized to develop a comprehensive description of the company’s positional strategy. A product/market grid is included. | Product objectives are clearly identified and associated with specific target markets. Product differentiators are analyzed in-depth to create a strong understanding of the clear and measurable differences of the company’s products. Objectives, markets and differentiators are synthesized to develop a robust description of the company’s positioning strategy. | Product objectives are clearly identified and associated with specific target markets, and product differentiators are analyzed. This information is utilized to communicate the company’s positioning strategy. | Product objectives and target markets are discussed. An attempt is made to discuss the company’s positioning strategy however the relationship to the objective and markets is not clearly described. | Two or more of the required elements are missing or completed with inaccurate or insufficient information. |
|  | **20 – 19**  | **18 – 17**  | **16 – 15**  | **14 – 12**  | **11 – 0**  |
| Marketing Program | The marketing program includes a product strategy that details the product line, the quality position and the current product packaging. The pricing strategy clearly identifies the company’s price points and the price position in the competitive marketplace. The promotional strategy highlights the key promotional elements and addresses both new and repeat customers. A detailed description of the current distribution strategy is presented. | The marketing program includes a product strategy that details the product line, the quality position and the product packaging. The pricing strategy clearly identifies the company’s price points and the price position in the competitive marketplace. The promotional strategy highlights the key promotional elements and addresses both new customers and repeat customers. A detailed description of the current distribution strategy is presented. | The marketing program includes an adequate presentation of the company’s product strategy, price strategy, promotion strategy and distribution strategy. | An attempt is made to present a product strategy, pricing strategy, promotional strategy and distribution strategy, however limited information is provided. | Two or more of the required elements are missing or completed with inaccurate or insufficient information. |
|  | **20 – 19**  | **18 – 17**  | **16 – 15**  | **14 – 12**  | **11 – 0**  |
| Financial Data and Projections/ Organization Chart | Recent sales data, as well as a 5 year projection of sales revenue is provided. Graphs are used to convey data in a manner that allows for easy comparison and analysis, and are presented in a professional manner. A solid foundation and basis of the assumptions and reasoning behind the 5 year sales revenue projection is provided. Accurate organization chart is included. | Recent sales data, as well as a 5 year projection of sales revenue is provided. Graphs are used to convey data in a manner that allows for easy comparison and analysis. An introduction to the philosophy and assumptions made to develop the 5 year projections is provided. Accurate organization chart is included. | Recent sales data, as well as 5 year projections of sales revenue are provided. Accurate organization chart is included. | Recent sales data is provided. Some attempt is made to develop 5 year projections, however a solid foundation for this projection is lacking. Organization chart is included but may be lacking necessary detail. | Recent sales data is provided. 5 year projection is missing or based on inaccurate or misleading information. Organization chart missing or includes inaccurate information. |
|  | **20 – 19**  | **18 – 17**  | **16 – 15**  | **14 – 12**  | **11 – 0**  |
| Implementation/ Evaluation and Controls | A specific implementation plan is provided, and includes dates and/or timeframes. Processes for comparing actual results with target results are presented and include sales data in addition to other key performance indicators. Tables and/or charts are used to convey key information. In addition, this section includes potential contingency plans for alternative courses of action if targeted values are not met. | A specific implementation plan is provided, and includes dates and/or timeframes. Processes for comparing actual results with target results are presented and include sales data in addition to other key performance indicators. Tables and/or charts are used to convey key information. | A specific and detailed implementation plan for the recommended strategies is provided. Sufficient performance parameters are provided. | The implementation plan creates a base for operationalizing the marketing recommendations, but lacks sufficient detail. Additional information regarding timing and key performance indicators is necessary. | A limited attempt is made at providing an implementation plan. Some date regarding implementation is provided however specific details and measurements are missing. |
|  | **40 – 37**  | **36 – 33**  | **342 – 29**  | **28 – 24**  | **23 – 0**  |
| Executive Summary and Recommendations Throughout Plan | Novel and innovative options for future strategies are provided for each element of the marketing plan. The strategies are appropriate for and capitalize on or the current environmental conditions, support the mission and vision of the organization, and integrate market projections. | Detailed and well developed future strategies are provided for each element of the marketing plan. The strategies are appropriate for current environmental conditions and align with organization goals. | Clear and appropriate future strategies are provided for each element of the marketing plan. | Some attempt is made to provide recommendations for future strategies however recommendations for some elements of the marketing plan are missing or incomplete. | Only a minimal attempt is made to provide recommendation for future strategies. Recommendations are missing, incomplete or do not take into account organization goals or existing conditions. |
|  | **40 – 37**  | **36 – 33**  | **342 – 29**  | **28 – 24**  | **23 – 0**  |
| Style, Format, and Mechanics | The marketing plan consistently models the language and conventions used in professional publications. The marketing plan would meet the guidelines and expectations for presentation to an executive board. The plan follows normal conventions of spelling, grammar and format throughout. Transitions and organizational structures such as subheadings are effectively used to help the reader move from one point to another. Appropriate references are utilized and correctly cited. | The marketing plan follows normal conventions of spelling, grammar, and professional format throughout. Transitions and organizational structures such as subheadings are effectively used to help the reader move from one point to another. Appropriate references are utilized and correctly cited. | The marketing plan is in a professional format, grammatical conventions are primarily correct, and appropriate references are utilized and correctly cited. The paper flows logically and is comprehendible. | Some attempt is made at professional formatting, however organization is weak and transitions do not allow the reader to flow smoothly from point to point. References are incorrectly cited. Spelling, grammar and punctuation errors are present. | The marketing plan contains numerous errors in spelling, grammar, and/or sentence structure, which make following the logic of the paper extremely difficult. Overall style and format make reading and comprehension problematic. References are not cited or are cited incorrectly. |

**Total: 220 Points**