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# SOSTAC® Marketing Plan Template

Work through each section in order. Resist the urge to skip to Tactics.

## **S** SITUATION *Where are we now?*

### KEY QUESTIONS

- Who are our customers and what do they actually want?
- How do our competitors have an advantage over us?
- What external factors (economic, social, tech) will affect us?
- What does our SWOT tell us?

## **S** STRATEGY *How do we get there?*

### KEY QUESTIONS

- Which segments are we targeting — and why?
- How will we position against the nearest alternative?
- Where will we compete, and where will we not?

## **A** ACTION *What is our plan?*

### KEY QUESTIONS

- Who owns each workstream — by name, not job title?
- What do we need to hire, buy, or build first?
- What are the 90-day milestones?

## **O** OBJECTIVES *Where do we want to be?*

### KEY QUESTIONS

- Sell: grow sales and market share — by how much, by when?
- Serve: what value do we add beyond the transaction?
- Sizzle: what is our wow factor and differentiation?
- Speak: how do we build two-way customer communication?
- Save: what efficiency gains can we quantify?

## **T** TACTICS *How exactly do we get there?*

### KEY QUESTIONS

- Which channels: SEO, email, paid, social, events, partnerships?
- What content and campaigns carry the strategy?
- What is the sequencing and timeline?

## **C** CONTROL *Did we get there?*

### KEY QUESTIONS

- Which 3–5 metrics tell us the plan is working?
- How often do we review, and who is in the room?
- What triggers a change in direction?

### THE MOST COMMON MISTAKE:

Most plans skip Situation and Strategy and jump straight to Tactics. Spend three times longer on S and S than feels comfortable.



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# Need help with the Strategy step?

If you are building a marketing plan and want a second pair of eyes on the Strategy before you commit to execution — that is exactly the work we do.

We work with B2B founders and leadership teams to build positioning from the customer's point of view and make it show up in the pipeline.

[Work with us → upstrategylab.com](https://upstrategylab.com)

## The Visibility Edge

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Every few weeks I write about positioning, strategy, and the commercial problems I am working through in practice. No fixed schedule. No filler.

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