

Rubric for Marketing Plan

	Level of Achievement		
Criteria	Excellent (5 pts)	Satisfactory (4 pts)	Unacceptable (1 pt)
<i>Content</i>			
Executive Summary	The executive summary clearly communicates the critical elements of the marketing plan so that it reads as a stand-alone document.	The executive summary includes most, but not all of the critical elements of the marketing plan. Some of the information provided in the summary is unnecessary or trivial to understanding the plan.	The executive summary is either too short (less than one page) or too long (more than two pages). The summary contains mostly unnecessary or trivial information; therefore, it is inadequate as a stand-alone document.
Introduction	The introduction clearly and concisely introduces the purpose of the marketing plan.	The introduction is somewhat unclear and/or not concise in stating the purpose of the marketing plan.	There is no introduction that states the purpose of the marketing plan.
Company Description and Mission Statement	Information about the company or organization is thoroughly and clearly reported, including such things as the mission statement, type of product or service, employees, company history, previous and current marketing efforts, current knowledge about customers and competitors, etc.	Information about company or organization is, for the most part, thoroughly and clearly reported. But some information that may be critical to the marketing plan is missing.	Company or organization information is provided, but there is a great deal of potentially important information missing.
Competitive Analysis	Information about all major competitors or strategic groups is thoroughly and clearly reported. Source(s) of the information is provided. Any information that is considered to be important to know, but that has not been obtained with reasonable effort is identified.	Information about most of the major competitors or strategic groups is provided. Not all of the information is as clearly reported as possible. The report does not explain missing data.	Some information about competitors is provided, but the analysis lacks thoroughness and clarity. There appears to have been little effort given to obtaining competitor information and there is no explanation for missing information

Situation Analysis	A thorough SWOT analysis is provided, based on the preceding analyses. Reasoning for each item in the SWOT is provided and logical. Strengths and weaknesses are clearly internal factors, and opportunities and threats are clearly external factors.	SWOT analysis is provided, but there are some missing points from preceding analyses. Reasoning for each item is not always thoroughly provided and/or logical. One or two strengths/weaknesses are external, or one-two opportunities/threats are internal.	SWOT analysis is provided, but there are at more than six missing points from preceding analyses. There is no reasoning provided for the items. More than two strengths/weaknesses or opportunities/threats are inappropriate.
Statement of Goals and Core Competencies	The marketing objectives and goals are clearly related to the company/organization mission. Objectives and goals are clearly stated and appropriately quantified.	Linkage of marketing objectives and goals to company/organization mission is not clearly stated. Some of the objectives and goals are unclear and/or not appropriately quantified.	Marketing goals and objectives are missing or those that are identified are not quantified or are inappropriate.
Marketing Mix	The marketing direction that will frame marketing tactics of the marketing plan is clearly and specifically stated. The marketing strategy is logically linked to the marketing objectives and goals.	Marketing strategy is identified but is unclear or unspecific in some aspects. The marketing strategy is logically linked to the marketing objectives and goals.	The marketing strategy is missing or is illogical given the marketing objectives and goals.
Target Market	Based on the marketing strategy and SWOT analysis, the target market(s) is appropriately identified and described. A positioning statement for each target market is identified and explained, and reasonable.	Based on the marketing strategy and SWOT analysis, the target market(s) is identified but not described in enough detail. Positioning statement(s) is provided but not explained.	Target market and positioning is missing, or, if identified, does not seem appropriate given the marketing strategy and SWOT analysis. Positioning statement(s) is missing.

Product Strategy	The objectives of product/brand management are clearly stated and appropriate. Tactics for managing the product/service/brand are thoroughly and clearly identified and reasoned. When necessary, sufficient detail about tactics is provided, making it easier to understand the scope of the tactic.	The objectives of product/brand management are stated, but somewhat unclear. Most of the tactics are thoroughly and clearly identified, but one obvious tactic is missing. Some detail on tactics is missing, hindering understanding.	Objectives for product/brand management are missing. More than one obvious tactic is missing. Very little detail on specific tactics is provided. Tactics are unclear and hard to understand.
Pricing Strategy	The objectives of pricing management are clearly stated and appropriate. Tactics for managing price are thoroughly and clearly identified and reasoned. When necessary, sufficient detail about tactics is provided, making it easier to understand the scope of the tactic.	The objectives of pricing management are stated, but somewhat unclear. Most of the tactics are thoroughly and clearly identified, but one obvious tactic is missing. Some detail on tactics is missing, hindering understanding.	Objectives for pricing management are missing. More than one obvious tactic is missing. Very little detail on specific tactics is provided. Tactics are unclear and hard to understand.
Distribution Strategy	The objectives of distribution management are clearly stated and appropriate. Tactics for managing distribution are thoroughly and clearly identified and reasoned. When necessary, sufficient detail about tactics is provided, making it easier to understand the scope of the tactic.	The objectives of distribution management are stated, but somewhat unclear. Most of the tactics are thoroughly and clearly identified, but one obvious tactic is missing. Some detail on tactics is missing, hindering understanding.	Objectives for distribution management are missing. More than one obvious tactic is missing. Very little detail on specific tactics is provided. Tactics are unclear and hard to understand.
Promotion Strategy	The objectives of the promotion strategy are clearly stated and appropriate. Tactics for promoting are thoroughly and clearly identified and reasoned. When necessary, sufficient detail about tactics is provided, making it easier to understand the scope of the tactic.	The objectives of the promotion strategy are stated, but somewhat unclear. Most of the tactics are thoroughly and clearly identified, but one obvious tactic is missing. Some detail on tactics is missing, hindering understanding.	Objectives of the promotion strategy management are missing. More than one obvious tactic is missing. Very little detail on specific tactics is provided. Tactics are unclear and hard to understand.

Budget, Schedule, and Monitoring	A thorough and specific implementation plan is clearly identified for budget, schedule, and monitoring; the plan identifies who is responsible for implementing the tactic, when it should be implemented, the cost, measurement of effectiveness, and any other relevant information. The implementation plan is specific enough so that the company/organization has a blueprint for using the plan. In addition to specific effectiveness measures for each tactic, overall control measures for the marketing plan, and contingency actions, are identified.	An implementation plan is identified, but one to two tactics are not addressed. Specificity of some of the plan could be improved. The company/organization will be able to use the plan to implement the marketing plan, but may be confused about some aspects because of missing information. Overall control measures are included and contingency actions are identified, but they lack thoroughness.	An implementation plan is identified, but more than two tactics are not addressed, and the plan generally lacks specificity. Because of missing information, the plan will not help the company/organization implement the marketing plan. Overall control measures and contingency plans are not identified.
Conclusion	A brief summary that identifies the expected outcomes with successful implementation of the marketing plan is clearly presented in a short paragraph.	A summary of expected outcomes is provided but lacks clarity.	There is no conclusion.
<i>Written Communication</i>			
Organization	Written work is well organized and easy to understand. Sections of the plan are marked with appropriate headings. Tables and charts are appropriately used and easy to understand, and contribute to the ease of reading the plan.	The organization is generally good, but some sections seem out of place. Some headings may be missing. Tables and charts are included, but are difficult to understand (e.g., poorly labeled).	The plan is disorganized to the extent that it prevents understanding the content. There are no headings. Inappropriate use of charts or tables; or, use of tables and charts is indicated, but not included.
Writing Style	The plan uses APA Style that is uniform throughout the paper and appropriate for this type of written project. There is no indication that the paper involved multiple authors.	APA Style lacks uniformity at times and is not always appropriate for a marketing plan. There is some indication of multiple authors (e.g., different fonts, different paper, etc.).	Plan is clearly the work of multiple authors with different writing styles, margins, printer fonts, paper types, etc. Does not use APA Style.
Grammar, Spelling, and Formatting	The plan has been thoroughly spell-checked	There are a few spelling and/or grammatical errors.	There are frequent misspelled words, serious

	and proofread. There are no to almost none grammatical or spelling errors. There are no formatting errors.	There are one to three formatting errors.	grammatical errors, and formatting errors, indicating that time was not taken to spell-check and proofread.
Use of Appendices	Information is appropriately placed in either the main text or an appendix. Appendices are documented and referenced in the text.	Information is sometimes misplaced. Documenting and referencing in text are somewhat incomplete. Appendices are poorly documented and referenced in text.	Considerable amount of material is misplaced. Appendices are not documented or referenced in text.
References	Material used in the writing of the plan taken from external sources is appropriately referenced both within the document and on a reference page using APA Style.	Some material taken from external sources is not referenced, either in the text or on a reference page.	No references in the text or on a reference page are provided, although it is obvious that material from external sources has been used.
Professionalism	Overall, the written communication of the marketing plan conveys a sense of professionalism, a written document that appears and reads like it was developed by professionals, not students.	Many aspects of the marketing plan convey a sense of professionalism, but there are some written communication problems that are not congruent with a professionally prepared marketing plan.	The marketing plan lacks any sense of professionalism and is clearly prepared by students.