

**Strategic Marketing Plan Worksheet 1**  
**Industry Profile**

(Make Additional Copies if Needed)

## Strategic Marketing Plan Worksheet 2 – Assessing Risk Tolerance A Priori Decision Tree – 6 Months Away From Marketing Month

Complete the following table regarding decisions you would make under the following circumstances. (Make additional copies if necessary).

Commodity	Months Away From Market Month	How Does The Price Compare to Historical Prices	General Long Range Outlook for Prices	<u>Marketing Action</u> What is My Marketing Decision
	6 Months	Top Third	↑	
	6 Months	Top Third	↔	
	6 Months	Top Third	↓	
	6 Months	Middle Third	↑	
	6 Months	Middle Third	↔	
	6 Months	Middle Third	↓	
	6 Months	Lower Third	↑	
	6 Months	Lower Third	↔	
	6 Months	Lower Third	↓	

## Strategic Marketing Plan Worksheet 3 – Assessing Risk Tolerance A Priori Decision Tree – 3 Months Away From Marketing Month

Complete the following table regarding decisions you would make under the following circumstances. (Make additional copies if necessary).

Commodity	Months Away From Market Month	How Does The Price Compare to Historical Prices	General Long Range Outlook for Prices	<u>Marketing Action</u> What is My Marketing Decision
	3 Months	Top Third	↑	
	3 Months	Top Third	↔	
	3 Months	Top Third	↓	
	3 Months	Middle Third	↑	
	3 Months	Middle Third	↔	
	3 Months	Middle Third	↓	
	3 Months	Lower Third	↑	
	3 Months	Lower Third	↔	
	3 Months	Lower Third	↓	



## Strategic Marketing Plan Worksheet 5 Breakeven Sensitivity Analysis

Commodity	Yield Sensitivity	Expected Yearly Production	Variable per Unit Cost of Production	Total per Unit Cost of Production
	20% Yield Decrease			
	15% Yield Decrease			
	10% Yield Decrease			
	5% Yield Decrease			
	Average Yields			
	5% Yield Increase			
	10% Yield Increase			
	15% Yield Increase			
	20% Yield Increase			
	20% Yield Decrease			
	15% Yield Decrease			
	10% Yield Decrease			
	5% Yield Decrease			
	Average Yields			
	5% Yield Increase			
	10% Yield Increase			
	15% Yield Increase			
	20% Yield Increase			
	20% Yield Decrease			
	15% Yield Decrease			
	10% Yield Decrease			
	5% Yield Decrease			
	Average Yields			
	5% Yield Increase			
	10% Yield Increase			
	15% Yield Increase			
	20% Yield Increase			

**Strategic Marketing Plan Worksheet 6**  
**Market Outlook & Expectations**  
(Make Additional Copies if Needed)

## Strategic Marketing Plan Worksheet 7

### Seasonal Price Trends

Complete the following regarding the commodities you produce. (Make additional copies if necessary).

Commodity Name		
Is there a seasonal price trend?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If "Yes", discuss:		

## Strategic Marketing Plan Worksheet 8

### Available Price Risk Tools - Crops

Complete the following table regarding the commodities you currently produce. (Make additional copies if necessary)

Commodity	Pricing Alternatives	Check all alternatives available for this commodity & you are comfortable with using	Explain Those Without Checks.
	Cash Market at Harvest		
	Speculative Storage		
	Forward Contract		
	Hedge to Arrive Contract		
	Basis Contract		
	Minimum Price Contract		
	Hedging in Futures Markets		
	Options Markets		
	Farm Program		
	Cooperatives/Groups		
	Other (Please list):		



## Strategic Marketing Plan Worksheet 9 Available Price Risk Tools - Livestock

Complete the following table regarding the commodities you currently produce. (Make additional copies if necessary)

Commodity	Pricing Alternatives	Check all alternatives available for this commodity & you are comfortable with using	Explain Those Without Checks.
	Cash Market (Auction Barn)		
	Private Treaty		
	Telephone, Video, & Satellite Auction		
	Forward Contract		
	Retained Ownership		
	Basis Contract		
	Minimum Price Contract		
	Grid Pricing		
	Hedging in Futures Markets		
	Options Markets		
	Farm Program		
	Cooperatives/Groups		
	Other (Please list):		



## Strategic Marketing Plan Worksheet 11

### Evaluating the Plan

Evaluate the marketing actions taken during the last year. (Make additional copies if necessary)

Commodity	Action Taken Last Year	Success/Failure of the Plan	Explanation

# **Tactical Marketing Plan Worksheets**

## Tactical Marketing Plan Worksheet 1

### Decision Making Information

Complete the following table regarding the commodities you currently produce under current market conditions. (Make additional copies if necessary).

Commodity	
Expected Yearly Production	
Variable Cost of Production per Unit	
Total Cost of Production (Break-Even)	
Are Futures/Option Contracts an Alternative?	<input type="checkbox"/> No <input type="checkbox"/> Yes
If "Yes", what is the current futures price?	
If "Yes", what is an at-the-money- put cost?	
What is the expected local basis at harvest (sale)?	
Will selling futures (buying a put) cover variable costs?	<input type="checkbox"/> No <input type="checkbox"/> Yes
Will selling futures (buying a put) ensure at least break-even?	<input type="checkbox"/> No <input type="checkbox"/> Yes
Are forward contracts available for this commodity?	<input type="checkbox"/> No <input type="checkbox"/> Yes
If "Yes" what is the forward contract price?	
Will the forward contract price cover variable costs?	
Will the forward contract price ensure at least break-even?	
Are basis contracts available?	<input type="checkbox"/> No <input type="checkbox"/> Yes
If "Yes", what is the current offer?	
If "Yes", is the current offer equal to or better than historical basis at harvest (sales) time?	<input type="checkbox"/> No <input type="checkbox"/> Yes

## Tactical Marketing Plan Worksheet 2

### Tactical Decision

Complete the following regarding the commodities you produce. (Make additional copies if necessary).

Commodity Name			
Current Month and Year			
Months from Harvest (or sale)			
General Price Level <i>(Circle One)</i>	Top Third	Middle Third	Bottom Third
Long Term Price Outlook <i>(Circle One)</i>	↑	↔	↓
Short Term Price Outlook <i>(Circle One)</i>	↑	↔	↓
Seasonal Price Trend Outlook <i>(Circle One)</i>	↑	↔	↓
Current Local Basis <i>(Circle One)</i>	Top Third	Middle Third	Bottom Third
A Priori Decision for this situation			
Decision:			
Why?			