

Marketing Planner

Small Business Success Plan

2022 Marketing Planner

Name: _____



Target Audience

Time to dig deep and start thinking about who you want to attract! Knowing your ideal customers will help you understand how your services address their needs and how you can help solve their pain points.

Gender

Age

Location

Education

Income level

Occupation

What do they do in their free time?


Your favourite brands and shops?


What are some of their biggest frustrations?

Competitor Analysis

	Competitor 1	Competitor 2	Competitor 3	Competitor 4
PRODUCTS				
PRICE				
APPEARANCE				
QUALITY				
PACKAGING				
REACH				
WEBSTORE				

Competitor Analysis

Competitor	Product	
		
What they do well:	How they do it better:	What they do poorly:

Competitor	Product	
		
What they do well:	How they do it better:	What they do poorly:

Product Planner

Product Category:

Problem	Solution

Product Ideas:

--

Your Choice:	Platform

Competitive Edge	Forecasting
	Launch Date: Sale Price: Profit:

Idea Matrix

Do I see myself
doing this?

Is there a
demand?

Can I create
the solution?

Product Idea #1

Product Idea #2

Product Idea #3

Product Idea #4

Launch Tracker

4 Months Before

[illegible]

3 Months Before

[illegible]

2 Months Before

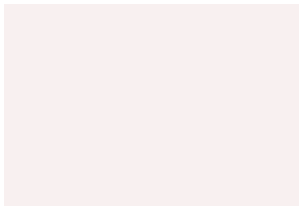
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1 Month Before

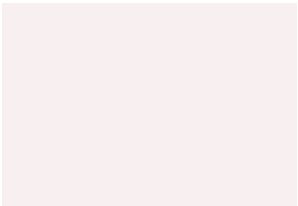
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4 Week Launch Plan

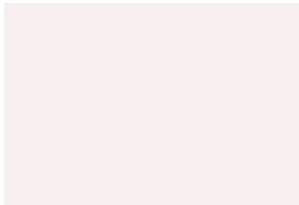
Week 1



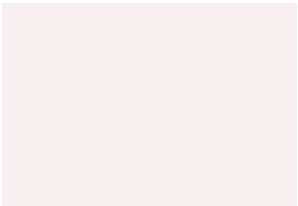
Week 2



Week 3



Week 4



Seasonal Ideas

January

February

March

April

May

June

July

August

September

October

November

December

Holiday Marketing

Holiday	Action Steps



My Action Plan

Holiday	Action Steps



My Action Plan

Marketing Plan

	Q1	Q2	Q3	Q4

Notes:

Q1 Goals

Quarterly Goal #1

No.	Name	Age	Sex	Religion	Marital Status	Occupation	Income
1	John Doe	35	Male	Christian	Married	Teacher	\$45,000
2	Jane Smith	28	Female	Muslim	Single	Nurse	\$38,000
3	Robert Johnson	42	Male	Hindu	Married	Engineer	\$52,000
4	Emily White	31	Female	Buddhist	Single	Software Developer	\$60,000
5	Michael Brown	25	Male	Jewish	Single	Student	\$15,000
6	Sarah Green	39	Female	Sikh	Married	Accountant	\$48,000
7	David Lee	22	Male	Christian	Single	Unemployed	\$0
8	Alice Black	45	Female	Muslim	Married	Homemaker	\$20,000
9	James Wilson	33	Male	Hindu	Single	Doctor	\$75,000
10	Olivia Taylor	27	Female	Buddhist	Married	Artist	\$30,000
11	Benjamin King	40	Male	Jewish	Married	Lawyer	\$80,000
12	Isabella Hall	30	Female	Sikh	Single	Marketing Executive	\$55,000
13	Ethan Scott	24	Male	Christian	Single	Researcher	\$40,000
14	Ava Baker	36	Female	Muslim	Married	Manager	\$50,000
15	Noah Adams	29	Male	Hindu	Single	Writer	\$25,000
16	Charlotte Evans	41	Female	Buddhist	Married	Teacher	\$42,000
17	Liam Foster	26	Male	Jewish	Single	Engineer	\$58,000
18	Amelia Grant	38	Female	Sikh	Married	Nurse	\$44,000
19	Lucas Hill	23	Male	Christian	Single	Student	\$12,000
20	Sophia King	43	Female	Muslim	Married	Homemaker	\$18,000
21	Isaac Lee	34	Male	Hindu	Single	Doctor	\$72,000
22	Mia Miller	28	Female	Buddhist	Married	Artist	\$28,000
23	Samuel Moore	40	Male	Jewish	Married	Lawyer	\$78,000
24	Evelyn Nelson	32	Female	Sikh	Single	Marketing Executive	\$53,000
25	Benjamin Parker	25	Male	Christian	Single	Researcher	\$39,000
26	Abigail Reed	37	Female	Muslim	Married	Manager	\$49,000
27	Henry Scott	30	Male	Hindu	Single	Writer	\$24,000
28	Victoria Stone	42	Female	Buddhist	Married	Teacher	\$41,000
29	Julian Taylor	27	Male	Jewish	Single	Engineer	\$57,000
30	Grace Turner	39	Female	Sikh	Married	Nurse	\$43,000
31	Leo Vance	24	Male	Christian	Single	Student	\$11,000
32	Chloe Walker	44	Female	Muslim	Married	Homemaker	\$17,000
33	Isaac White	35	Male	Hindu	Single	Doctor	\$71,000
34	Madeline Wright	29	Female	Buddhist	Married	Artist	\$27,000
35	Samuel Young	41	Male	Jewish	Married	Lawyer	\$77,000
36	Elizabeth Zane	33	Female	Sikh	Single	Marketing Executive	\$52,000
37	Christopher Bell	26	Male	Christian	Single	Researcher	\$37,000
38	Madison Black	38	Female	Muslim	Married	Manager	\$47,000
39	Christopher Clark	31	Male	Hindu	Single	Writer	\$23,000
40	Olivia Davis	43	Female	Buddhist	Married	Teacher	\$40,000
41	Julian Evans	28	Male	Jewish	Single	Engineer	\$56,000
42	Grace Foster	40	Female	Sikh	Married	Nurse	\$42,000
43	Leo Grant	25	Male	Christian	Single	Student	\$10,000
44	Chloe Hill	45	Female	Muslim	Married	Homemaker	\$16,000
45	Isaac King	36	Male	Hindu	Single	Doctor	\$70,000
46	Madeline Lee	30	Female	Buddhist	Married	Artist	\$26,000
47	Samuel Miller	42	Male	Jewish	Married	Lawyer	\$76,000
48	Elizabeth Moore	34	Female	Sikh	Single	Marketing Executive	\$51,000
49	Christopher Nelson	27	Male	Christian	Single	Researcher	\$36,000
50	Madison Parker	39	Female	Muslim	Married	Manager	\$46,000
51	Christopher Reed	32	Male	Hindu	Single	Writer	\$22,000
52	Olivia Scott	44	Female	Buddhist	Married	Teacher	\$39,000
53	Julian Stone	29	Male	Jewish	Single	Engineer	\$55,000
54	Grace Taylor	41	Female	Sikh	Married	Nurse	\$41,000
55	Leo Turner	26	Male	Christian	Single	Student	\$9,000
56	Chloe Vance	46	Female	Muslim	Married	Homemaker	\$15,000
57	Isaac Walker	37	Male	Hindu	Single	Doctor	\$69,000
58	Madeline White	31	Female	Buddhist	Married	Artist	\$25,000
59	Samuel Wright	43	Male	Jewish	Married	Lawyer	\$75,000
60	Elizabeth Young	35	Female	Sikh	Single	Marketing Executive	\$50,000
61	Christopher Zane	28	Male	Christian	Single	Researcher	\$3

Quarterly Goal #2

[illegible]

Quarterly Goal #3

Take Action

This image shows a blank sheet of white paper designed for handwriting practice. It features ten horizontal dashed lines spaced evenly down the page. A single solid vertical line runs along the left edge, creating a narrow margin. The rest of the page is open space between the lines, intended for writing practice.

Take Action

[illegible]

Take Action

This image shows a full page of primary-ruled paper. It features ten sets of horizontal dashed lines, each set consisting of two parallel lines with a gap between them, providing a guide for letter height and placement. The paper is otherwise blank, with no text or other markings.

Q2 Goals

Quarterly Goal #1

Quarterly Goal #2

[illegible]

Quarterly Goal #3

Country	Year	Age	Gender	Education	Occupation	Income	Health	Life expectancy
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1

Take Action

[illegible]

Take Action

This image shows a blank sheet of white paper designed for handwriting practice. It features a solid vertical line on the left side, creating a narrow margin. The rest of the page is filled with horizontal dashed lines, providing guides for letter height and placement. There are no pre-written words or numbers on the page.

Take Action

[illegible]

Q3 Goals

Quarterly Goal #1

Quarterly Goal #2

The first two studies were conducted by researchers who had no knowledge of the purpose of the study or the results of the other study. The third study was conducted by a researcher who knew the purpose of the study and the results of the other study. The fourth study was conducted by a researcher who knew the purpose of the study but did not know the results of the other study. The fifth study was conducted by a researcher who knew the purpose of the study and the results of the other study.

Quarterly Goal #3

Country	Year	Age	Gender	Education	Occupation	Income	Health	Life expectancy
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1
USA	2000	65	Male	High	Professional	High	Good	77.1
USA	2000	65	Female	High	Professional	High	Good	77.1

Take Action

[illegible]

Take Action

This image shows a blank sheet of white paper designed for handwriting practice. It features a solid vertical line on the left side, creating a narrow margin. The rest of the page is filled with horizontal dashed lines, spaced evenly apart, providing a guide for letter height and placement. There are no other markings or text on the page.

Take Action

[illegible]

Q4 Goals

Quarterly Goal #1

Quarterly Goal #2

Quarterly Goal #3

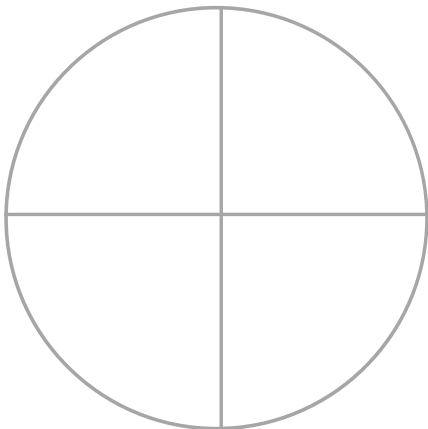
Take Action

Take Action

Take Action

Campaign Budget

Marketing Pie



Date:

Campaign:

Total Budget:

Notes:

Channel	Budget	Actual	Comments

Bills & Income

Income

Work Income: \$

Other: \$

\$

\$

\$

Variable Bills

\$

\$

\$

\$

\$

\$

\$

\$

Monthly Expenses

\$

\$

\$

\$

\$

\$

\$

\$

\$

\$

Totals

Income: \$

Total bills: \$

Savings: \$

Excess: \$

Marketing Message


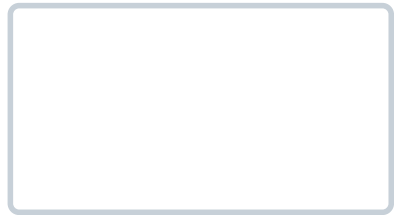
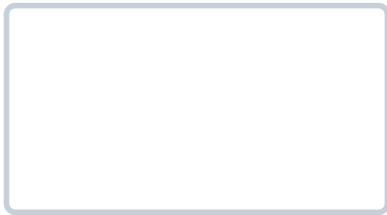
WHAT'S IN IT FOR THEM?

IDENTIFY BIG PAINS OF YOUR TARGET AUDIENCE

What's their fear/doubt/pain
and worry



How is that impacting their
quality of life?



Content Plan

WEEK OF:	CREATE IT CHECKLIST
THEME:	<div><input type="checkbox"/> WRITTEN</div> <div><input type="checkbox"/> AUDIO</div> <div><input type="checkbox"/> VIDEO</div> <div><input type="checkbox"/> LEAD MAGNET</div> <div><input type="checkbox"/> CONTENT UPGRADE</div> <div><input type="checkbox"/> PAID PRODUCT</div>
CONTENT TO CREATE:	

WEEK OF:	CREATE IT CHECKLIST
THEME:	<div><input type="checkbox"/> WRITTEN</div> <div><input type="checkbox"/> AUDIO</div> <div><input type="checkbox"/> VIDEO</div> <div><input type="checkbox"/> LEAD MAGNET</div> <div><input type="checkbox"/> CONTENT UPGRADE</div> <div><input type="checkbox"/> PAID PRODUCT</div>
CONTENT TO CREATE:	

Instagram Post Planner

PUBLISH DATE:	<input type="checkbox"/> IMAGE
TIME:	<input type="checkbox"/> IMAGE EDITING
CATEGORY:	<input type="checkbox"/> CAPTION
LINK TO INCLUDE:	<input type="checkbox"/> HASHTAGS
	<input type="checkbox"/> POST
	<input type="checkbox"/> ENGAGE
	<input type="checkbox"/> _____
CAPTION:	
HASHTAGS:	
POST STATS:	

PUBLISH DATE:	<input type="checkbox"/> IMAGE
TIME:	<input type="checkbox"/> IMAGE EDITING
CATEGORY:	<input type="checkbox"/> CAPTION
LINK TO INCLUDE:	<input type="checkbox"/> HASHTAGS
	<input type="checkbox"/> POST
	<input type="checkbox"/> ENGAGE
	<input type="checkbox"/> _____
CAPTION:	
HASHTAGS:	
POST STATS:	

Collaboration Pitch List

To Pitch	Contact	Response	Result

Holiday Hashtags

January

Date	Holiday	Hashtag

February

Date	Holiday	Hashtag

March

Date	Holiday	Hashtag

Holiday Hashtags

April

Date	Holiday	Hashtag

May

Date	Holiday	Hashtag

June

Date	Holiday	Hashtag

Holiday Hashtags

July

Date	Holiday	Hashtag

August

Date	Holiday	Hashtag

September

Date	Holiday	Hashtag

Holiday Hashtags

October

Date	Holiday	Hashtag

November

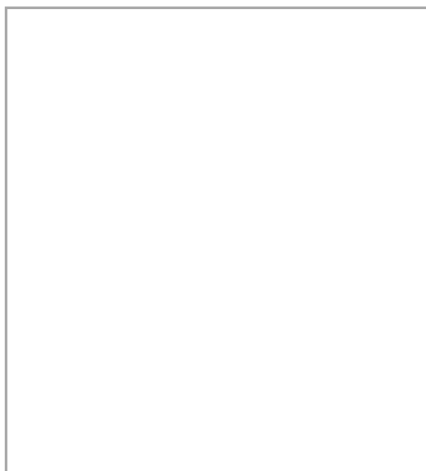
Date	Holiday	Hashtag

December

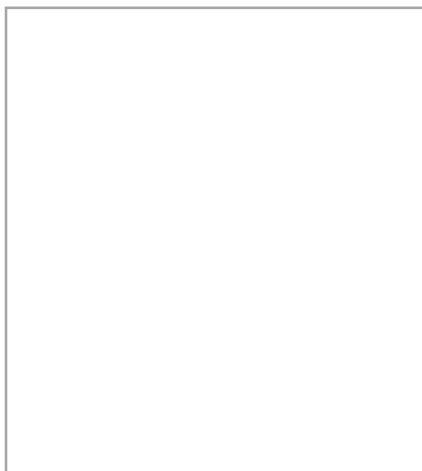
Date	Holiday	Hashtag

Instagram 4 weeks planner

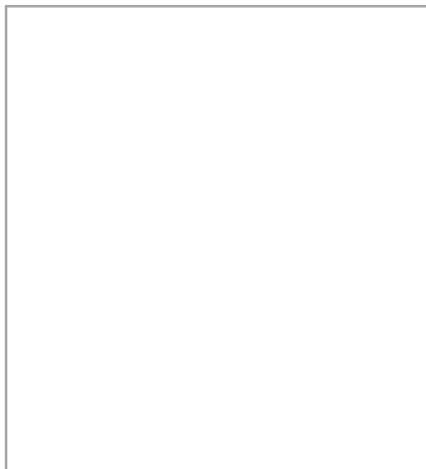
Week 1:

A large, empty square box with a thin black border, intended for planning content for Week 1.

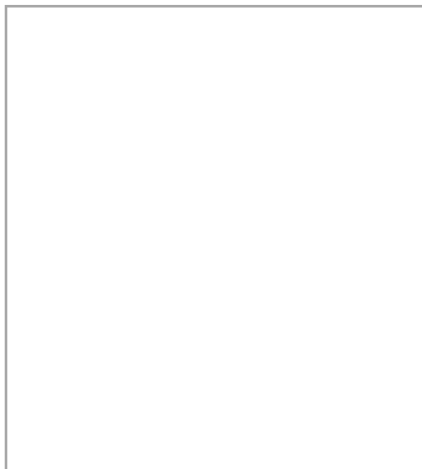
Week 2:

A large, empty square box with a thin black border, intended for planning content for Week 2.

Week 3:

A large, empty square box with a thin black border, intended for planning content for Week 3.

Week 4:

A large, empty square box with a thin black border, intended for planning content for Week 4.

Facebook Post Planner

PUBLISH DATE:	<input type="checkbox"/> IMAGE <input type="checkbox"/> IMAGE EDITING <input type="checkbox"/> DESCRIPTION <input type="checkbox"/> HASHTAGS <input type="checkbox"/> POST <input type="checkbox"/> ENGAGE <input type="checkbox"/> SHARE ON GROUPS
TIME:	
CATEGORY:	
LINK TO INCLUDE:	
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

PUBLISH DATE:	<input type="checkbox"/> IMAGE <input type="checkbox"/> IMAGE EDITING <input type="checkbox"/> DESCRIPTION <input type="checkbox"/> HASHTAGS <input type="checkbox"/> POST <input type="checkbox"/> ENGAGE <input type="checkbox"/> SHARE ON GROUPS
TIME:	
CAPTION:	
LINK TO INCLUDE:	
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

Facebook Live Planner

Date:

Theme:

Before You Go Live

- ☐ Promote Your FB Live Graphic
- ☐ Send email to invite to your live
- ☐ Create announcement on your fb page/group

During Live Broadcast

- ☐ Welcome
- ☐ State Your Topic
- ☐ Ask a question that activates pain points
- ☐ Call out people
- ☐ Tell them you will solve their problem
- ☐ Share a story about how you struggled the same
- ☐ Deliver your content / mention freebie / paid offer
- ☐ Give a call to action to get freebie / paid offer

[illegible]

Facebook Group Post Planner

Date:

Theme:

<div>Monday</div> <div>Copy:</div> <div>Call to Action:</div> <div>URL:</div>	<div>Tuesday</div> <div>Copy:</div> <div>Call to Action:</div> <div>URL:</div>
<div>Wednesday</div> <div>Copy:</div> <div>Call to Action:</div> <div>URL:</div>	<div>Thursday</div> <div>Copy:</div> <div>Call to Action:</div> <div>URL:</div>
<div>Friday</div> <div>Copy:</div> <div>Call to Action:</div> <div>URL:</div>	<div>Saturday</div> <div>Copy:</div> <div>Call to Action:</div> <div>URL:</div>

Pinterest Planner

PUBLISH DATE:	<input type="checkbox"/> IMAGE
TIME:	<input type="checkbox"/> GRAPHIC
CATEGORY:	<input type="checkbox"/> DESCRIPTION
LINK TO INCLUDE:	<input type="checkbox"/> HASHTAGS
	<input type="checkbox"/> PIN
	<input type="checkbox"/> GROUP BOARDS
	<input type="checkbox"/> _____
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

PUBLISH DATE:	<input type="checkbox"/> IMAGE
TIME:	<input type="checkbox"/> GRAPHIC
CATEGORY:	<input type="checkbox"/> DESCRIPTION
LINK TO INCLUDE:	<input type="checkbox"/> HASHTAGS
	<input type="checkbox"/> PIN
	<input type="checkbox"/> GROUP BOARDS
	<input type="checkbox"/> _____
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

[illegible]

Followers Tracker

	Instagram	Facebook	Twitter	Pinterest	Linkedin
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					
31					

Blog Post Planner

Date:	Title:	Promo Strategy:

Notes:

Blog Post Brain Dump

Blog Post Topic Ideas

Blog Before & After Publish

Before Publish

- ☐ Write a blog post title that includes keywords
- ☐ Divide text into smaller section with headings easy to read
- ☐ Deep link to relevant past posts
- ☐ Add a question at the end to encourage comments
- ☐ Add on your brand or SEO ready images
- ☐ Add 'alt text' to your images, which will be used as your Pinterest pin description
- ☐ Add a featured image (on Wordpress)
- ☐ Make sure your post is SEO friendly (with yoast plugin help)
- ☐ Proofread + spell check (twice!)

After Publish

- ☐ Share your post on Facebook page/group/instagram
- ☐ Shedule it to be pinned to relevant Pinterest group boards
- ☐ Do a IG or Facebook Live about your post
- ☐ Send post to Newsletter subscribers
- ☐ Schedule your postfor Twitter several more times
- ☐ Respond to comments
- ☐ Check analytics of your post to see how much engagement it received in 30 days, 90 days,180 days, spin your post onto Pinterest.

Guest Post Contacts

Blog Name:

URL: _____

Contact: _____

Email: _____

Phone: _____

Note: _____

Blog Name:

URL: _____

Contact: _____

Email: _____

Phone: _____

Note: _____

Blog Name:

URL: _____

Contact: _____

Email: _____

Phone: _____

Note: _____

Blog Name:

URL: _____

Contact: _____

Email: _____

Phone: _____

Note: _____

Blog Name:

URL: _____

Contact: _____

Email: _____

Phone: _____

Note: _____

Blog Name:

URL: _____

Contact: _____

Email: _____

Phone: _____

Note: _____

Keyword Research

Take one your product name and brainstorm keywords with topics and sub-topics asking the below questions. Think of at least 3 sub-topics for each question. The idea is to create a web of related words stemming from your general topic or product name.

Topic

What

1:

2:

3:

Why

1:

2:

3:

How

1:

2:

3:

Where

1:

2:

3:

Which

1:

2:

3:

When

1:

2:

3:

Notes:

Keyword Creator

General/Broad Keywords	Long Tail/Specific Keywords

Variation 1

Variation 2

Variation 3

Lead Magnet Planner

What problems are my ideal clients are facing?

What kind of lead magnet would help them?

Ideas

Ideas

Final choice

Promotion ideas

Newsletter Planner

Month:

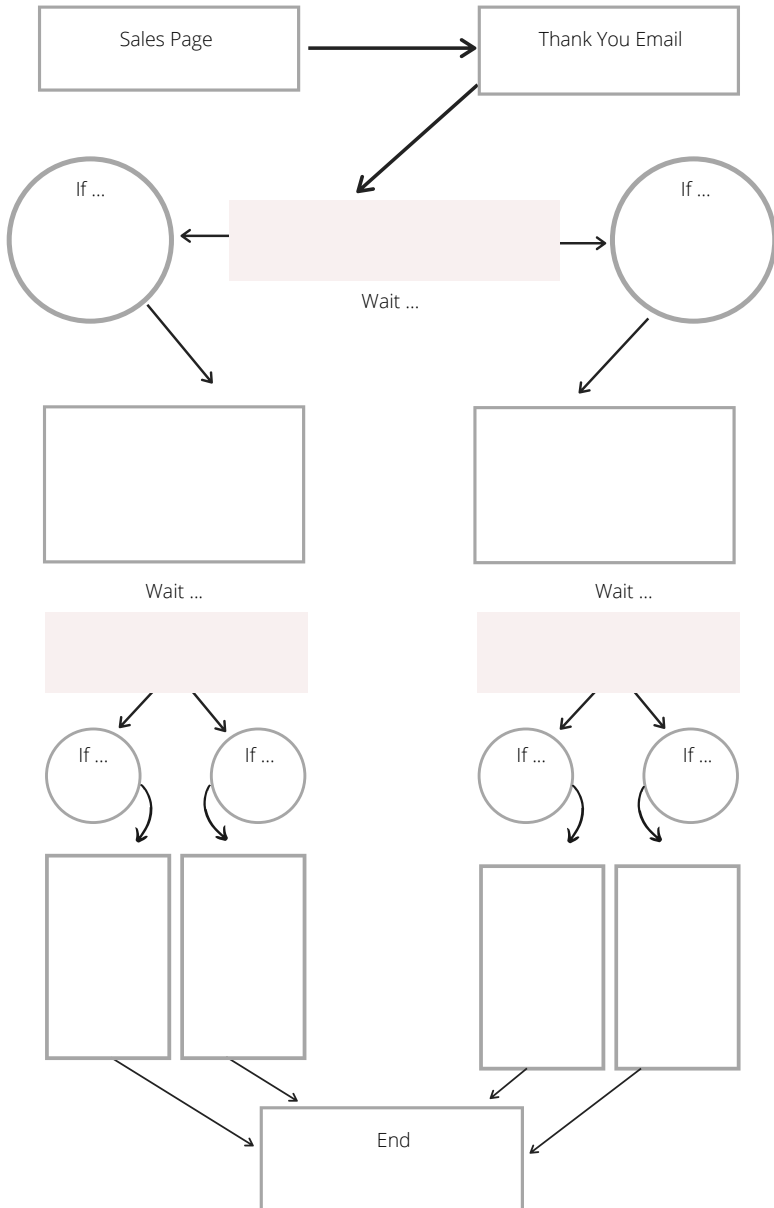
Title:		Date:	
Email Topics:		Link to	
<div><div></div><div></div><div></div></div>		<div><div></div><div></div><div></div></div>	
Opened:	Conversion:	Clicks:	Subscribers:

Title:		Date:	
Email Topics:		Link to	
<div><div></div><div></div><div></div></div>		<div><div></div><div></div><div></div></div>	
Opened:	Conversion:	Clicks:	Subscribers:

Title:		Date:	
Email Topics:		Link to	
<div><div></div><div></div><div></div></div>		<div><div></div><div></div><div></div></div>	
Opened:	Conversion:	Clicks:	Subscribers:

Title:		Date:	
Email Topics:		Link to	
<div><div></div><div></div><div></div></div>		<div><div></div><div></div><div></div></div>	
Opened:	Conversion:	Clicks:	Subscribers:

Email Funnel



Write Welcome Email

Focus of your
Message

Key Points or
Information to
Include

1

2

3

Headline Idea 1

.....

Headline Idea 2

.....

Headline Idea 3

.....

Message

P/S Idea 1

.....

P/S Idea 2

.....

P/S Idea 3

.....

Marketing Goals

MONTH:

GOAL 1

GOAL 2



DEADLINE:

DEADLINE:

GOAL 3

GOAL 4



DEADLINE:

DEADLINE:

Focus Planner

Task to focus:

Date:

Deadline:

To Do:Done:

To Do:Done:

Notes:

One Big Thing to Accomplish on

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

DON'T FORGET ABOUT...

MUST CONTACT THIS WEEK

IDEAS ...

Month Planner

MONTH:

Week 1

Week 2

Week 3

Week 4

Week 5

Special Dates

EVENTS:

MONTHS TO COME:

Yearly Planner

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

Ad Tracker

Date	Daily Budget	Spent	Sales

Listings	Results from ads	Total Profit
	Run time of ads	Next ad start date

Date	Daily Budget	Spent	Sales

Listings	Results from ads	Total Profit
	Run time of ads	Next ad start date

Notes:

Marketing Funnel

Step 1: Be Discovered

Goal

Now

Step 2: Gain Trust

Goal

Now

Step 3: Take Action

Goal

Now

Step 4: Encourage Advocacy

Goal

Now

Weekly Lead Generation

- Share a valuable (+ saveable) Instagram grid post
- Create a Reel + share to your feed
- Connect + engage with 50 new ideal clients
- Search Facebook groups for potential clients looking for your services
- Check Facebook group suggestions for new, relevant groups for your ideal client
- Write a blog post (optimise for SEO!)
- Share your blog posts on Pinterest (+optimise for Pinterest SEO!)
- Check Google Analytics for high traffic pages + ensure they are set up to convert visitors to customers