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 a;ohm to their needs and how you can help solve their painpoints.

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

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

3 Months Before

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

2 Months Before

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

1 Month Before

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

4 Week Launch Plan

Week 1

Week 1

Week 2

Week 2

Week 3

Week 3

Week 4

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	Quarterly Goal #2	Quarterly Goal #3

Take Action	Take Action	Take Action

Q2 Goals

Quarterly Goal #1	Quarterly Goal #2	Quarterly Goal #3

Take Action	Take Action	Take Action

Q3 Goals

Quarterly Goal #1	Quarterly Goal #2	Quarterly Goal #3

Take Action	Take Action	Take Action

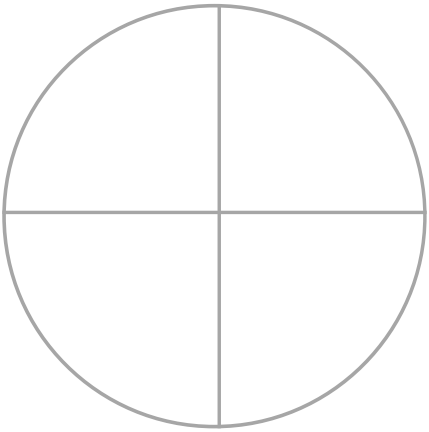
Q4 Goals

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:	☐ WRITTEN ☐ AUDIO ☐ VIDEO ☐ LEAD MAGNET ☐ CONTENT UPGRADE ☐ PAID PRODUCT
CONTENT TO CREATE:	

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THEME:	☐ WRITTEN ☐ AUDIO ☐ VIDEO ☐ LEAD MAGNET ☐ CONTENT UPGRADE ☐ PAID PRODUCT
CONTENT TO CREATE:	

Instagram Post Planner

PUBLISH DATE:	☐ IMAGE
TIME:	☐ IMAGE EDITING
CATEGORY:	☐ CAPTION
LINK TO INCLUDE:	☐ HASHTAGS
	☐ POST
	☐ ENGAGE
	☐ _____
CAPTION:	
HASHTAGS:	
POST STATS:	

PUBLISH DATE:	☐ IMAGE
TIME:	☐ IMAGE EDITING
CATEGORY:	☐ CAPTION
LINK TO INCLUDE:	☐ HASHTAGS
	☐ POST
	☐ ENGAGE
	☐ _____
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:

Week 2:

Week 3:

Week 4:

Facebook Post Planner

PUBLISH DATE:	☐ IMAGE
TIME:	☐ IMAGE EDITING ☐ DESCRIPTION
CATEGORY:	☐ HASHTAGS ☐ POST
LINK TO INCLUDE:	☐ ENGAGE ☐ SHARE ON GROUPS
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

PUBLISH DATE:	☐ IMAGE
TIME:	☐ IMAGE EDITING ☐ DESCRIPTION
CAPTION:	☐ HASHTAGS ☐ POST
LINK TO INCLUDE:	☐ ENGAGE ☐ SHARE ON GROUPS
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

Facebook Groups Planner

FACEBOOK GROUPS	M	T	W	T	F	S	S

Facebook Group Post Planner

Date: **Theme:**

Monday	Tuesday
Copy: Call to Action: URL:	Copy: Call to Action: URL:

Wednesday	Thursday
Copy: Call to Action: URL:	Copy: Call to Action: URL:

Friday	Saturday
Copy: Call to Action: URL:	Copy: Call to Action: URL:

Pinterest Planner

PUBLISH DATE:	☐ IMAGE
TIME:	☐ GRAPHIC
CATEGORY:	☐ DESCRIPTION
LINK TO INCLUDE:	☐ HASHTAGS
	☐ PIN
	☐ GROUP BOARDS
	☐ _____
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

PUBLISH DATE:	☐ IMAGE
TIME:	☐ GRAPHIC
CATEGORY:	☐ DESCRIPTION
LINK TO INCLUDE:	☐ HASHTAGS
	☐ PIN
	☐ GROUP BOARDS
	☐ _____
DESCRIPTION:	
HASHTAGS:	
POST STATS:	

Pinterest Boards Planner

GROUPS BOARDS	M	T	W	T	F	S	S

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 abour 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	Why	How
1: _____	1: _____	1: _____
2: _____	2: _____	2: _____
3: _____	3: _____	3: _____

Where	Which	When
1: _____	1: _____	1: _____
2: _____	2: _____	2: _____
3: _____	3: _____	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 ● ● ●

Opened:	Conversion:	Clicks:	Subscribers:

Title:	Date:
Email Topics: ● ● ●	Link to ● ● ●

Opened:	Conversion:	Clicks:	Subscribers:

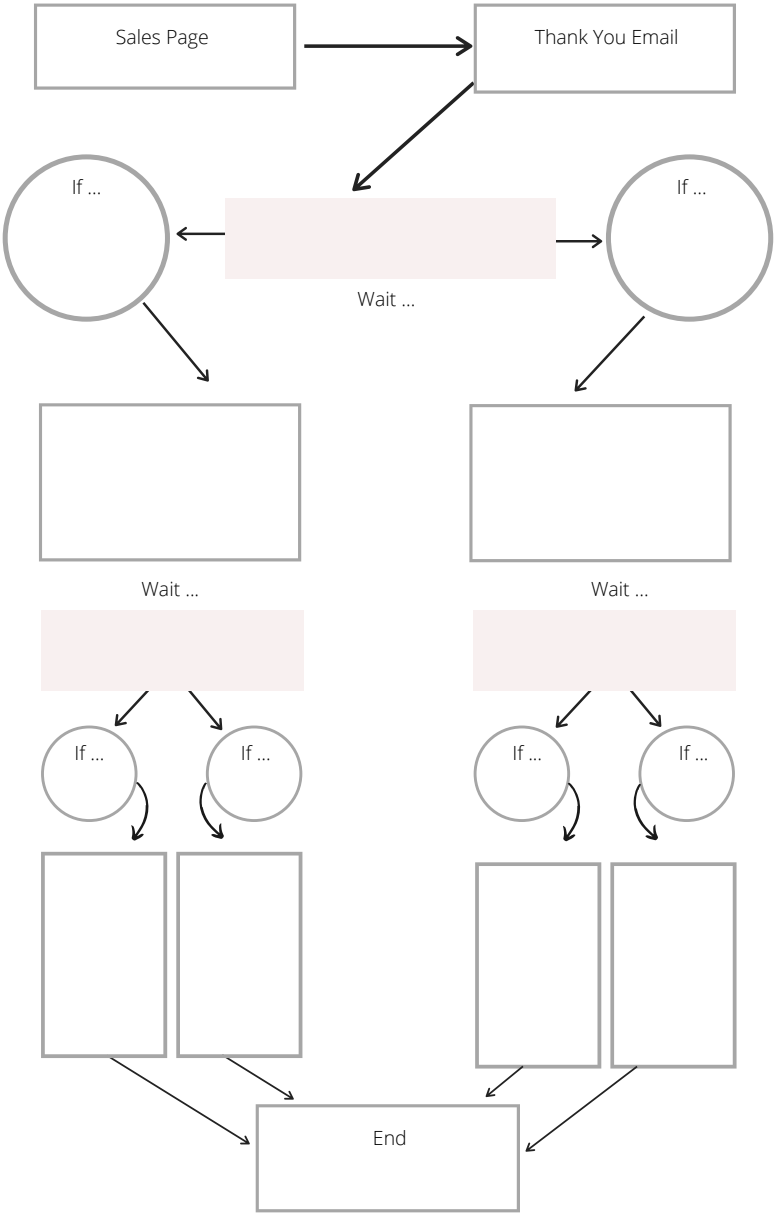
Title:	Date:
Email Topics: ● ● ●	Link to ● ● ●

Opened:	Conversion:	Clicks:	Subscribers:

Title:	Date:
Email Topics: ● ● ●	Link to ● ● ●

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