

Marketing Plan Worksheet

Developing a marketing plan that drives profits is easy when you keep two things in mind:

Every marketing task has a goal. For everything you do in the name of marketing your business, you should know exactly what the goal is. Are you building brand awareness? Driving traffic to your opt-in page? Making sales?

Consistency counts above all else. When you're new, it's easy to make big plans to be everywhere—host webinars and start a Facebook group and blog regularly and start a podcast and all the things.—but if you let those goals spread your time and energy too thin, things can fall apart quickly. It's better to start with what you know you can easily manage, and then build on it as you become more efficient.

- MARKETING METHODS AND BUSINESS MODELS MATCH-UP -

Not all marketing methods are a fit for all businesses, so the first step is to eliminate what you'll never use, and then we'll prioritize the rest based on your skills, budget, and personal preferences.

Back to Basics: An Online Business Start-Up Plan

IF YOUR BUSINESS MODEL IS...	TRY THESE MARKETING METHODS
Freelancing, virtual assistance, or other done-for-you services	<ul style="list-style-type: none"> ▪ Word of mouth ▪ Social media marketing ▪ Content marketing
Digital products or courses	<ul style="list-style-type: none"> ▪ Social media marketing ▪ Content marketing ▪ Affiliate program ▪ Paid advertising
Membership sites	<ul style="list-style-type: none"> ▪ Social media marketing ▪ Content marketing ▪ Affiliate program ▪ Paid advertising
Affiliate marketing	<ul style="list-style-type: none"> ▪ Social media marketing ▪ Content marketing ▪ Paid advertising
Content creation	<ul style="list-style-type: none"> ▪ Social media marketing ▪ Content marketing ▪ Paid advertising
Coaching	<ul style="list-style-type: none"> ▪ Word of mouth ▪ Social media marketing ▪ Content marketing ▪ Affiliate program ▪ Paid advertising

- TIME VS MONEY -

In most business decisions, you'll need to evaluate the time vs. money question. In other words, which do you have more of right now?

This is especially true with marketing.

There are methods you can use that will cost you nothing more than your time—content marketing for example—and there are others that require a significant investment of cash. Being realistic about your time vs. money situation will help you decide where to focus your efforts first.

IF YOU HAVE MORE TIME THAN MONEY	IF YOU HAVE MORE MONEY THAN TIME
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<ul style="list-style-type: none">▪ Word of mouth▪ Social media marketing▪ Content marketing	<ul style="list-style-type: none">▪ Affiliate program▪ Paid advertising
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Time and Money Commitments

Before you can decide for sure which marketing methods you'll be using, it's important to have a good understanding of exactly what each method will cost you, either in terms of time or money (or both).

Word of Mouth Advertising

Time Required: 1 hour per week

Money Required: None

Skills Required: Relationship building

Word of mouth advertising can be quite passive, requiring very little of your time, and it requires no money. However, to keep leads coming in, it is a good idea to spend at least an hour or so per week on relationship building and outreach with existing clients and others.

Social Media Marketing

Time Required: 1 — 2 hours per week

Money Required: \$0 — \$100 per month

Skills Required: Relationship building

Social media marketing can become a huge time suck if you let it, but it doesn't have to be. Likewise, you can spend a lot on design tools and schedulers, but again, neither of those are strictly necessary.

Content Marketing

Time Required: 5 — 10 hours per week or more

Money Required: \$0 — \$500 per month or more

Skills Required: Writing or other content creation

Content marketing is the most time intensive of the "free" marketing methods, because you'll spend significant time researching and creating new content. This can easily stretch into 2 or even 3 or more hours daily, depending on your business model and skills.

You can choose to outsource your content creation instead and pay a writer to help with

blogging or even podcasting or video scripts, but that's not typically where new business owners begin.

You can also choose to start with done-for-you content (PLR) and rewrite it to reflect your own voice and style. That can save time (and money), but for best results, you should aim to create something that is no longer recognizable as PLR. In other words, make it unique to you.

Affiliate Programs

Time Required: 1 — 2 hours per week

Money Required: \$200 — \$2,000 to set up with monthly fees between \$0 and \$299 + commission payments

Skills Required: Relationship building and some technical knowledge

Affiliate programs are a great way to market digital products and courses, and ongoing maintenance is low-cost and a low time commitment. However, there's a pretty significant up-front investment in software and set up.

Paid Advertising

Time Required: 1 — 2 hours per week or more

Money Required: \$1 — \$20 daily or more

Skills Required: Copywriting and some technical knowledge

Paid advertising is an advanced method that's not well suited for new business owners. But if you have money you're willing to invest, and you're interested in using paid ads long term, then it's worth exploring.

Depending on the platform, your most significant investment in time will be simply learning the system. You can expect to spend several hours getting familiar with how advertising works. You'll likely invest a good bit in testing new ads (both in time and money) before you land on a winning combination.

Outsourcing ad management is an option as well. Expect to pay up to \$1500 per month in addition to your ad spend for a professional team to manage your ads.

- YOUR TURN -

Keeping your business model, time and money budget, and skills in mind, it's time to choose the marketing methods you'll use to grow your business.

I recommend you choose a primary method and a secondary method to start, and then build on those by adding more methods to the mix down the road.

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Primary Marketing Method

Secondary Marketing Method

- DECIDE YOUR MARKETING GOAL –

You can't plot your course until you know where you're going. Now that you've chosen the marketing methods that will work for your budget, skills, and personality, it's time to identify your campaign goals.

Back to Basics: An Online Business Start-Up Plan

IF YOUR BUSINESS MODEL IS...	YOUR MARKETING GOAL MIGHT BE ...
Freelancing, virtual assistance, or other done-for-you services	<ul style="list-style-type: none"> ▪ To book a discovery call ▪ Brand awareness or name recognition ▪ To land a new client
Digital products or courses	<ul style="list-style-type: none"> ▪ Brand awareness or name recognition ▪ To make a sale ▪ To grow your email list
Membership sites	<ul style="list-style-type: none"> ▪ Brand awareness or name recognition ▪ To make a sale ▪ To grow your mailing list ▪ To win back a canceled member ▪ To engage inactive members
Affiliate marketing	<ul style="list-style-type: none"> ▪ Brand awareness or name recognition ▪ To grow your mailing list ▪ To make sales ▪ To drive traffic
Content creation	<ul style="list-style-type: none"> ▪ Brand awareness or name recognition ▪ To grow your mailing list ▪ To drive traffic & clicks
Coaching	<ul style="list-style-type: none"> ▪ Brand awareness or name recognition ▪ To book a discovery call ▪ To fill a webinar ▪ To grow your email list

- YOUR TURN -

Considering the list above, what are your primary and secondary goals with your business marketing? Jot them down below.

My Marketing Goals

- MARKETING TASKS -

Finally, now that you know which methods you'll use and what your goals are, it's time to work out your daily marketing task list. At the start of this worksheet I mentioned that consistency is one of the most important drivers of success, and this task list is where consistency counts more than ever.

Not only that, but with this task list in hand, you will never sit down at your desk in the morning and wonder what it is you're supposed to be doing to grow your business today.

This list is not all inclusive, but is meant to give you a starting point for creating your own. You can use the blank worksheet on the following pages to work out your schedule.

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MARKETING METHOD	TASK	FREQUENCY
Word of Mouth	Existing client outreach	Monthly per client (more when you need to fill your calendar)
	Friend/family outreach	As the opportunity presents itself
	Add testimonial and referral requests to your autoresponder	One time
Social Media Marketing (Use only the platforms where your ideal client is spending time)	Post updates to your Facebook page	Daily
	Post updates to Instagram	Daily
	Post updates to Twitter	Multiple times per day
	Post updates to LinkedIn	Daily
	Post or comment in relevant groups	Daily
	Post or comment in groups you own	Multiple times per day
Content Marketing	Create one piece of primary content (blog post, podcast, YouTube)	Weekly
	Promote your new content on social media	Daily
	Email your list with new content	Weekly
Affiliate Program	Email your affiliates with updates and upcoming releases	Weekly
	Reach out to potential new affiliates	Weekly or more
	Reach out personally to VIP affiliates	As needed
Paid Advertising	Set up new ads/funnels	As needed
	Check stats and monitor ad spend	Daily

- MY MARKETING PLANNER -

Using the task list above as your guide and keeping your time and money budget in mind, use this worksheet to map out your daily and weekly tasks.

Monday	Tuesday	Wednesday	Thursday	Friday