

# MARKETING PLANNING WORKBOOK



# Quick Marketing Audit

Before we take you through the steps you need for effective marketing planning, let's take a few minutes to audit your current marketing activity:

Q1: On a scale of 1 - 10 (1 being very unhappy - 10 being Very Happy), how would you rate your current marketing activity overall?

1 2 3 4 5 6 7 8 9 10

Q2: How effective are your Social Media accounts?

1 2 3 4 5 6 7 8 9 10

Q3: How would you rate your Website as a marketing tool?

1 2 3 4 5 6 7 8 9 10

Q4: What marketing activity do you enjoy?

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Q5: What marketing activity do you NOT enjoy?

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Q6: Does your current marketing activity attract the customers you want?

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# Goals

The questions below will help you plan out your marketing activity to cover the next few months. Make notes and start planning today!

These two questions will help you assess the big picture headlines that we will then break down over the next few pages:

**What are your Business Goals for the Year?**

**What are your Marketing Goals for the Year?**

**What is your USP?**

**What are your biggest challenges?**

**What opportunities do you have?**

# Who is your ideal audience?

Who are you trying to attract with your marketing? We are not big fans of client avatars but it is important to have an idea of who you want to attract and where they hangout on social media. You may also have different audiences for your different products & services!

For example, it is not ideal to spend time and resource on Instagram if your ideal audience is not there.

E.g.  
Female Entrepreneurs  
UK location  
24 - 40  
Online businesses

or

HR Managers  
East Midlands  
10+ employees

# Your audience

Once you have an idea of who you are targeting, you then need to put yourself in their shoes.

**Why do customers buy from you?**

**What problems do you solve?**

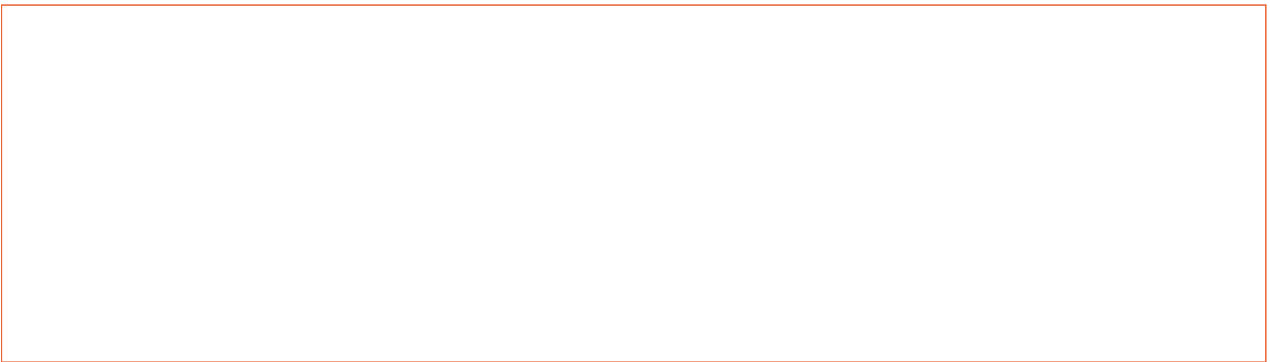
**What questions would they ask?**

# Your audience

**Where do they hang out?**



**Can you reach them easily?**



**What barriers do you have?**

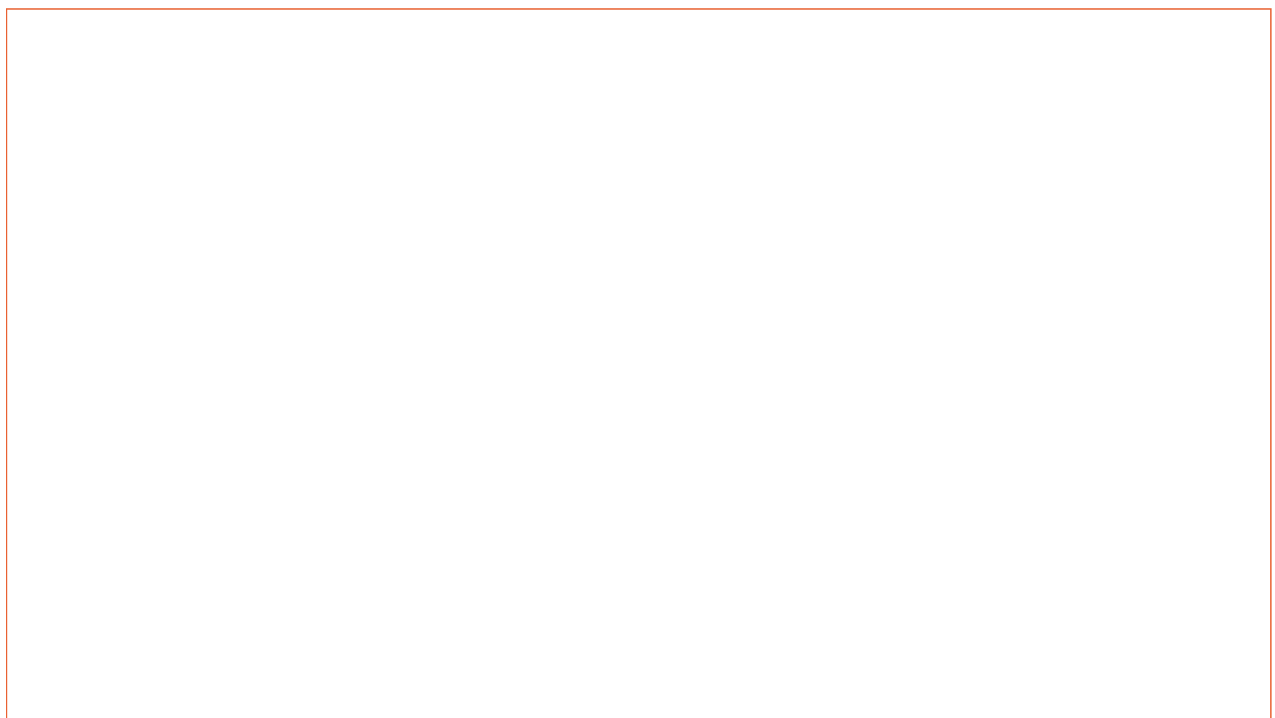


# Your Marketing Tools

**What Marketing activity do you undertake?**



**What Marketing materials do you have?**





# Time to benchmark?

Before you undertake any new marketing activity, it is really important that you take a snapshot of where you are today so that you can reassess each month to see what's working. Use the boxes below to note down your current position:

Marketing Activity	Current Stats
Website Traffic	
Mailing List(s)	
Networking Contacts	
Google My Business	
Facebook Page	
LinkedIn	
Twitter	
Instagram	
Pinterest	
Snapchat	
Monthly Enquiries	

# Marketing Scorecard

Once you have taken the benchmarking scores, time to look at how you are going to track your marketing success. A simple scorecard can really make a difference if you work out the metrics that drive your business:



Marketing Activity	Mth 1	Mth 2	Mth 3
Website Traffic			
Mailing List(s)			
Networking Contacts			
Google My Business			
Facebook Page			
LinkedIn			
Twitter			
Instagram			
Pintrest			
# of Calls in 27 Seconds /converted			
Monthly Enquiries / Converted			

# It's all about content...

The best advice we can give you is to note down ideas for content, especially if you are in a seasonal business. This will then give you idea of the types of content you need to create. Ideas can include:

- Awareness Days suitable for your business
- Seasonal challenges / opportunities for your business
- Seasonal messages - Happy Christmas / Easter etc
- Article topics
- Showcasing a service per month or a product per Week
- Event promotion / event follow-up with photos

Here is an example:

<p><b>Jan</b></p>  <p>New Year's Resolutions New Service Promotion Meet the Team January Sales</p>	<p><b>Feb</b></p> <p>Service Promotion 1 - Recruitment</p>	<p><b>March</b></p> <p>Spring Clean your (.....) Spring Offers Service Promotion 2 - Bespoke Training</p>
<p><b>April</b></p>  <p>Easter Message Service Promotion 3 - Exhibition Planning</p>	<p><b>May</b></p> <p>Event Promotion Starts Service Promotion 4 - Marketing Materials</p>	<p><b>June</b></p> <p>Event Promotion &amp; Follow Up Service Promotion 5 - Social Media Support</p>
<p><b>July</b></p>	<p><b>Aug</b></p>  <p>Holiday Opening Times Seasonal Blog Post</p>	<p><b>Sept</b></p>
<p><b>Oct</b></p>	<p><b>Nov</b></p> <p>Plan your festive offers</p>	<p><b>Dec</b></p>  <p>Xmas Message Festive Opening Times Boxing Day Sales</p>

# It's all about content...

Now it is your turn - plan your your content like a pro - what key themes do you have over the year that you can use for blogs, social media and web content - just headlines at this stage:

January 	February 	March 	April 
May 	June 	July 	August 
September 	October 	November 	December 

<https://share.hsforms.com/1CPDdktNRQkKCWf2oOvuhIA35lvk>

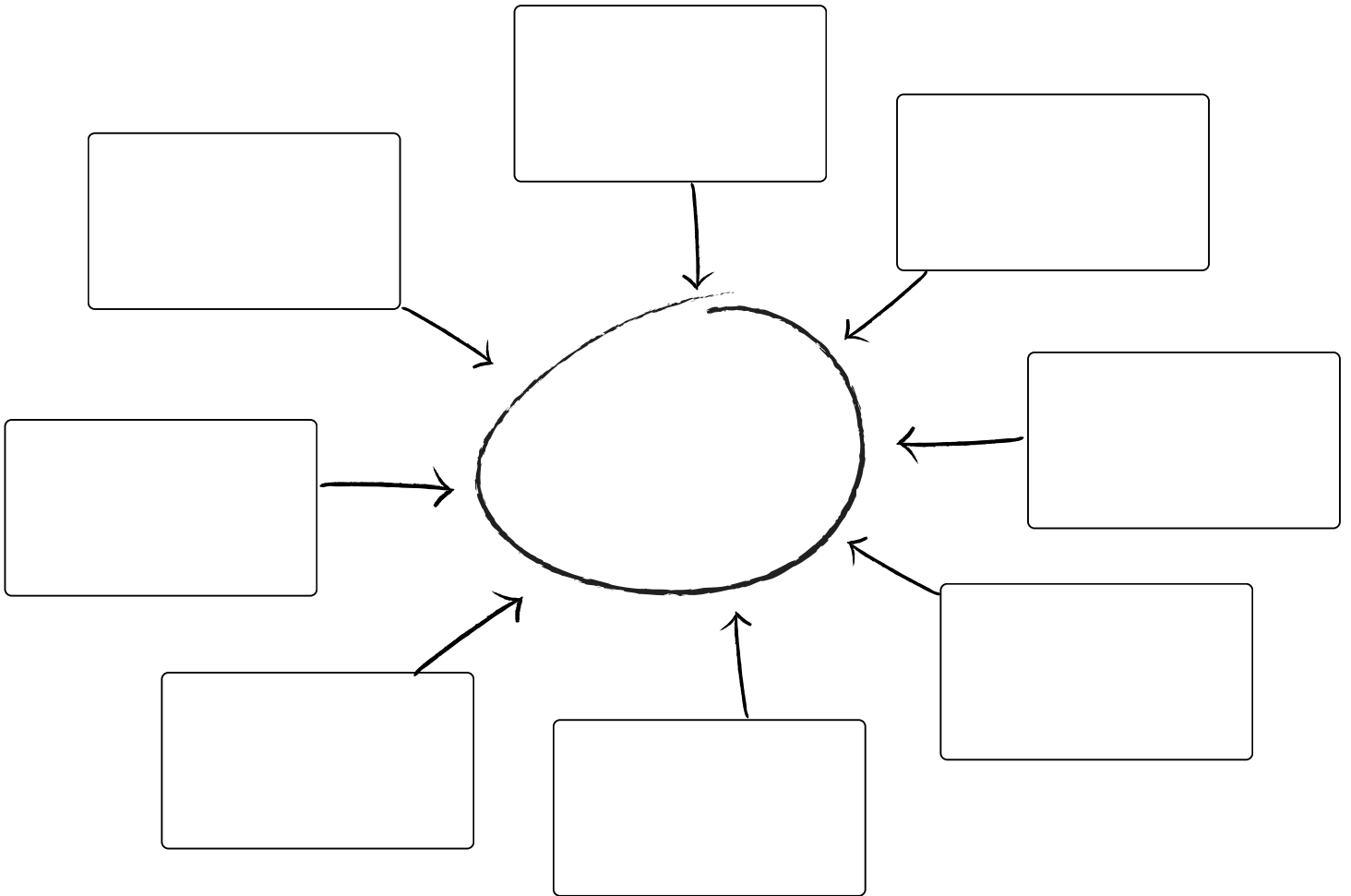
# Marketing Bingo

Please circle all of the marketing activities you currently undertake:

Advertising / Print	Events / Exhibitions	Blogging	Webinars	Direct Mail
Advertising / Facebook / Google	Social Media	Networking	Sponsorship	Lead Magnets - Guides etc.
Video Campaign	Directory Listings	Search Marketing	Google My Business	Email Marketing - New Clients
Targeted Emails After Enquiry	Newsletters	Product Information	Special Offers	Email Campaign - Existing Clients
Case Studies	Free Trials	Product Demo	Special Offers for Existing Clients	Feedback / Referrals

# Marketing Tools

Make a note of all the marketing tools you currently use and those that you want to use - do they work together and can you streamline your processes.



# Marketing Tools

Let's take the last exercise and expand out how you are going to use each of the tools. It is vital you get clear and focus what you really need. Think essentials. By noting down how you will use the tool it will help you decide if it is a necessity or a nice to have:

**Tool:**

**How will you use it?**

**Tool:**

**How will you use it?**

**Tool:**

**How will you use it?**

# Marketing Tools

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# Putting It All Together: Qtr 1

Marketing Tool	Month 1	Month 2	Month 3
E.g. Email Marketing	New Year's Resolutions Planning	Bespoke Training	Spring Offers

# Putting It All Together: Qtr 2

	Month 4	Month 5	Month 6
E.g. Email Marketing	Event Planning	Networking	Summer Offers

# Putting It All Together: Qtr 3

	Month 7	Month 8	Month 9
E.g. Email Marketing	Summer Staffing	Holiday ideas	Autumn Offers

# Putting It All Together: Qtr 4

	Month 10	Month 11	Month 12
E.g. Email Marketing	Don't let your ..... be scary!!!	Planning your festive marketing	Boxing Day Saless

# Budgets & Resources

Now it is time to assess what budgets and resources you need to achieve the marketing activity you want. This could be a time resource or a monetary resource - be clear!

Marketing Activity	Budgets	Resources
E.g Newsletter	£1000	2-3 Months for launch Outsourced Design / Content written internally

# Project Planner

Now is the time to pick the most important marketing activity you have highlighted and map out how you are going to make it happen

## Action Plan:

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## Comments:

## Time Planner:

**Start Date**

**Deadline**

**Completed**





Claire Taylor

Creationz Marketing is a Nottingham based Marketing Agency formed in 2013 by Claire Taylor with the ethos of providing realistic, affordable marketing consultancy & social media facilitation to businesses who may not have their own marketing team in place.

Contact us for an informal chat on how Creationz Marketing can be an added addition to your marketing team or if you would like to learn a little more about us, call us on 0115 8376 260.

Any questions with this workbook, please contact us on -  
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