

Name of Company: _____

Date: _____

Additional Info: _____

Marketing plans are about planning, setting goals and to do lists as well as staying accountable for each step.

It's not always easy to plan, the process is often time consuming and daunting, however planning is vital for success.

Section 1

This section is about YOU. Think deeply about who you are and what your passion(s) are? Why do you want to be in this space (business)? Why do customers choose you?

About You	
What Is Your Purpose? What Is Your WHY?	
What sets you apart from other businesses?	
Who are your ideal clients?	
What is most important to your clients?	
Where do you see yourself in... ? (Examples: 6 weeks, 3 months, 6 months, 1 year from now)	
What do you want to achieve this coming year? (2022-2023)	
What do you want to focus on in order of priorities?	



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What are your current 3 top goals?	
What is your mission, vision and core? Is it clear on your social media and website presence?	
Do you have a business coach, mentor or accountability partner? Tell me more about this (An answer that can be discussed on a call)	
How much would you like to generate from each program/ class you produce? (Also good to talk about on a call).	
Why does your ideal customer think of you first?	
Financial Planning – (another one good to discuss in person).	
What channels will work for social media?	
Additional Thoughts	



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Section 2

In this section it's a good idea to think about the 4 P's in Marketing.
Product, Pricing, Place and Promotion.

Group / Category	Plan Of Action
Who is your Target Market/ Audience?	
Description of Product(s)/ Service(s)	
Offer(s) to Customers	
Best Pricing Offer (Price Strategy)	
Where are you selling? (Distribution)	
What are your sales goals? (Sales Strategy)	
Customer Service, Delivery Process, customer experience. What are they saying about you? (Service Strategy)	
How are you reminding / informing your clientele about you? Ads? Emails? Newsletter? Snippets? (Promotion Strategy)	
Marketing Research	
Branding Thoughts	



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