

# MARKETING PLAN



**WHAT:** Part 1 of developing your 12-month marketing plan

**WHY:** So that you can be intentional and clear about what you're doing, when, and why, so that you can grow on your terms.

# The Destination

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WHERE DO I WANT TO BE IN ONE YEAR?

HOW DO I WANT TO FEEL IN ONE YEAR?

# Annual Goal Planning

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HOW MANY **HOURS** DO I WANT TO WORK A WEEK?

DO I WANT **DOWN TIME** & WHEN?

DO I HAVE A **BUSY SEASON** & WHEN?

WHAT COULD HELP ME MAKE **BUSY SEASON BETTER** FOR MY FAMILY?

DO I KNOW OF ANY **PERSONAL BIG EVENTS** THAT I SHOULD PLAN AROUND?

# Income Goal Planning

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WHAT IS MY **ANNUAL INCOME GOAL**?

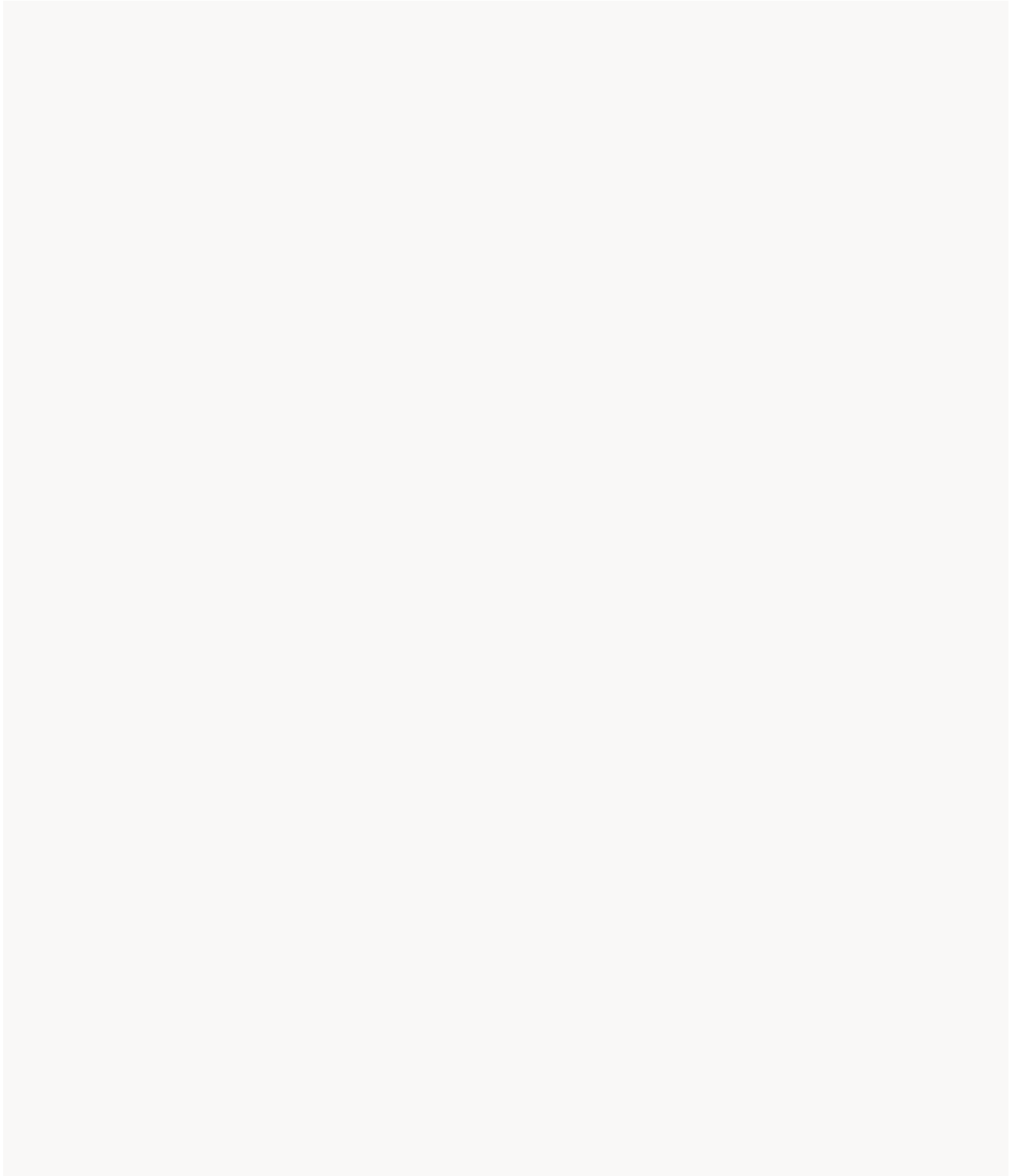
WHAT WOULD IT TAKE **TO REACH THAT**? (EX: \$100,000 GOAL = 9 CLIENTS A MONTH @ \$1,000 EACH)

IS THIS INCOME GOAL IN ALIGNMENT WITH HOW **I WANT TO FEEL** AND WHO I WANT TO BE PERSONALLY? (WHY OR WHY NOT)

**TO REACH THIS GOAL, WHAT WOULD I NEED TO DO DIFFERENTLY?**

# Marketing Idea Brain Dump

YOU NOW KNOW WHAT YOU WANT. IT'S TIME TO START GENERATING IDEAS TO GET YOU THERE.

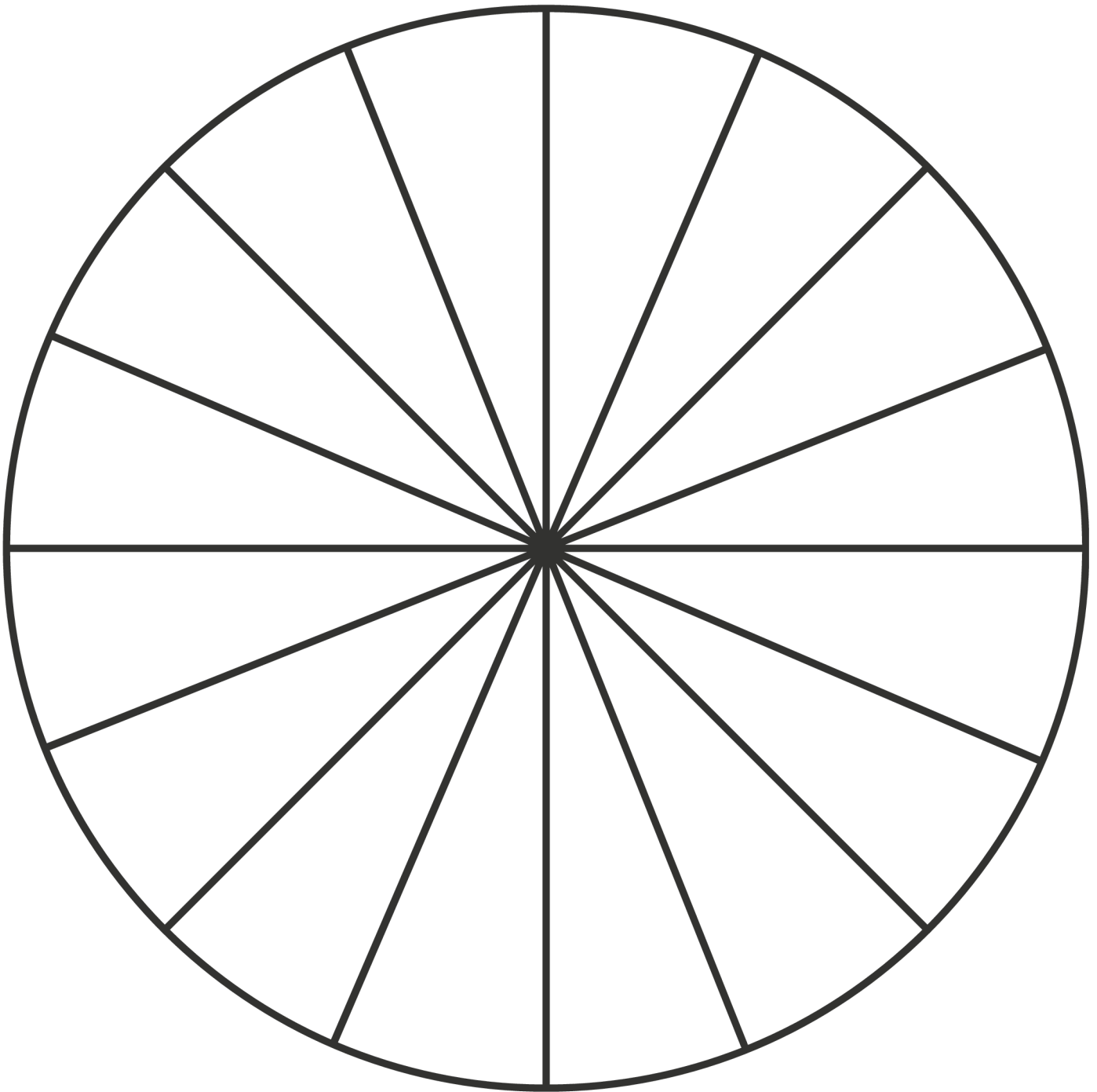


## MARKETING IDEA TEST

	Y	N
Does this idea have the potential to get me 10% closer to my primary goal?	<input type="checkbox"/>	<input type="checkbox"/>
Is this idea in alignment with my desired lifestyle (how I want to feel)?	<input type="checkbox"/>	<input type="checkbox"/>
Is the cost something I can afford and does it make financial sense?	<input type="checkbox"/>	<input type="checkbox"/>
If I need help to execute this idea, do I have a plan/budget to get that help?	<input type="checkbox"/>	<input type="checkbox"/>
Is this something I could duplicate again and again?	<input type="checkbox"/>	<input type="checkbox"/>
Am I available to give the amount of time/resources this idea needs?	<input type="checkbox"/>	<input type="checkbox"/>

# Marketing Wheel

DUMP OUT EVERY IDEA THAT COULD HELP YOU REACH YOUR BIG GOAL.  
GIVE EACH IDEA A SPOT ON THE WHEEL. THEY MAY NOT ALL HAPPEN AND  
THAT'S OKAY.



# Marketing Ideas by Quarter

NOW START LOOKING AT WHERE THESE IDEAS WOULD FIT, OR DOES THINKING AROUND CERTAIN TIMES OF YEAR SPARK ANY NEW IDEAS?

**JAN-MAR**

**APR-JUN**

**JUL-SEPT**

**OCT-DEC**



# How often?

TAKE YOUR TOP MARKETING IDEAS, AND PLACE THEM IN EACH BLOCK,  
DOES THIS FEEL LIKE A GOOD FIT?

**DAILY**

**WEEKLY**

**MONTHLY**

**QUARTERLY**

**ANNUALLY**

**EVERGREEN**

# Specific Strategy Breakdown

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THE IDEA:

THE GOAL:

YOUR PROMISE TO THEM:

- 1.
- 2.
- 3.

ROUGH TIMELINE FOR EXECUTION:

DATE TO GET STARTED (SO IT'S NOT RUSHED):

☐ ONGOING

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# IDEAS

## 20 MARKETING IDEAS FOR YOU

1. Opt-In Funnel
2. Regular Video Content
3. Interact Quiz
4. Create a Challenge
5. Host an Online Summit
6. Partner with Other Businesses
7. Start a Podcast
8. Schedule a Podcast Tour
9. Open Enrollment
10. Host Webinar/Live/
11. Collab using 'Go Live with Friends' on IG
12. Social Media Ads
13. Host Class or Events
14. Create Customer Referral/Affiliate Program
15. LinkedIn Marketing
16. Pocket Course Funnel
17. Collaboration Projects
18. Special Sales (think Black Friday/birthday)
19. Get PR Features (try [helpareporter.com](http://helpareporter.com))
20. Create an Experience Worth Talking About