

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.

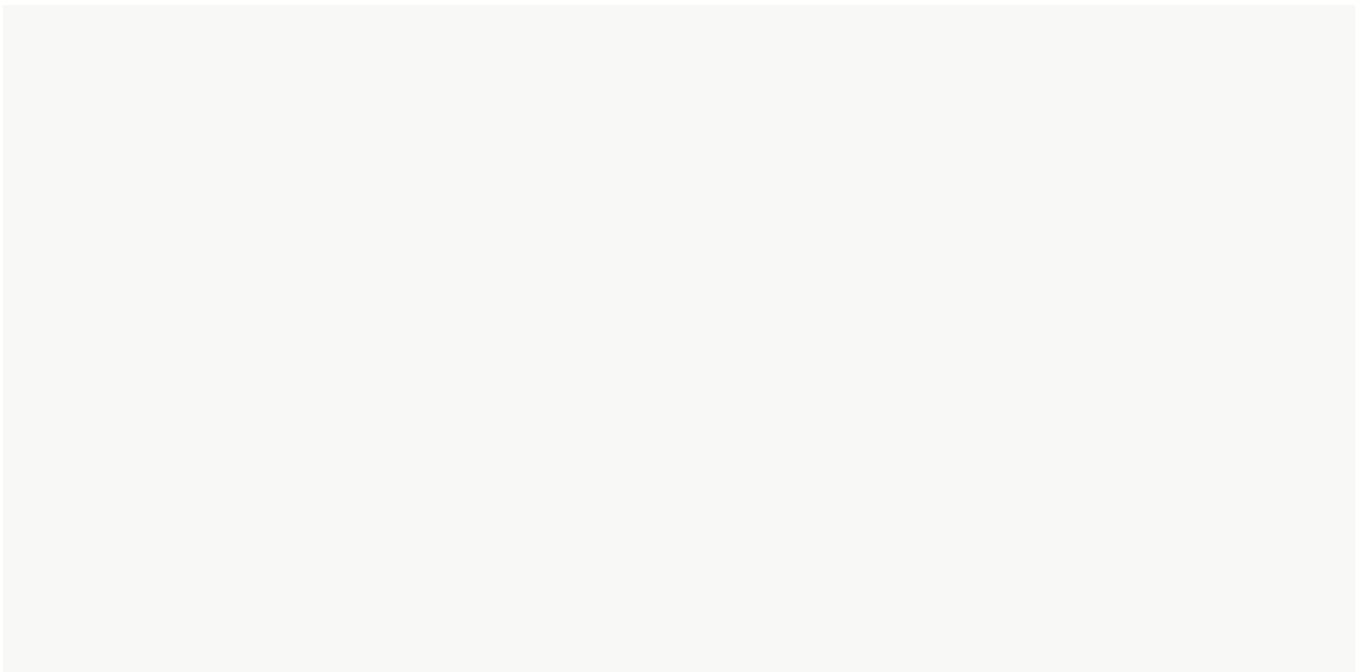
growth
GETTERS

The Destination

WHERE DO I WANT TO BE IN ONE YEAR?



HOW DO I WANT TO FEEL IN ONE YEAR?



Annual Goal Planning

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

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.

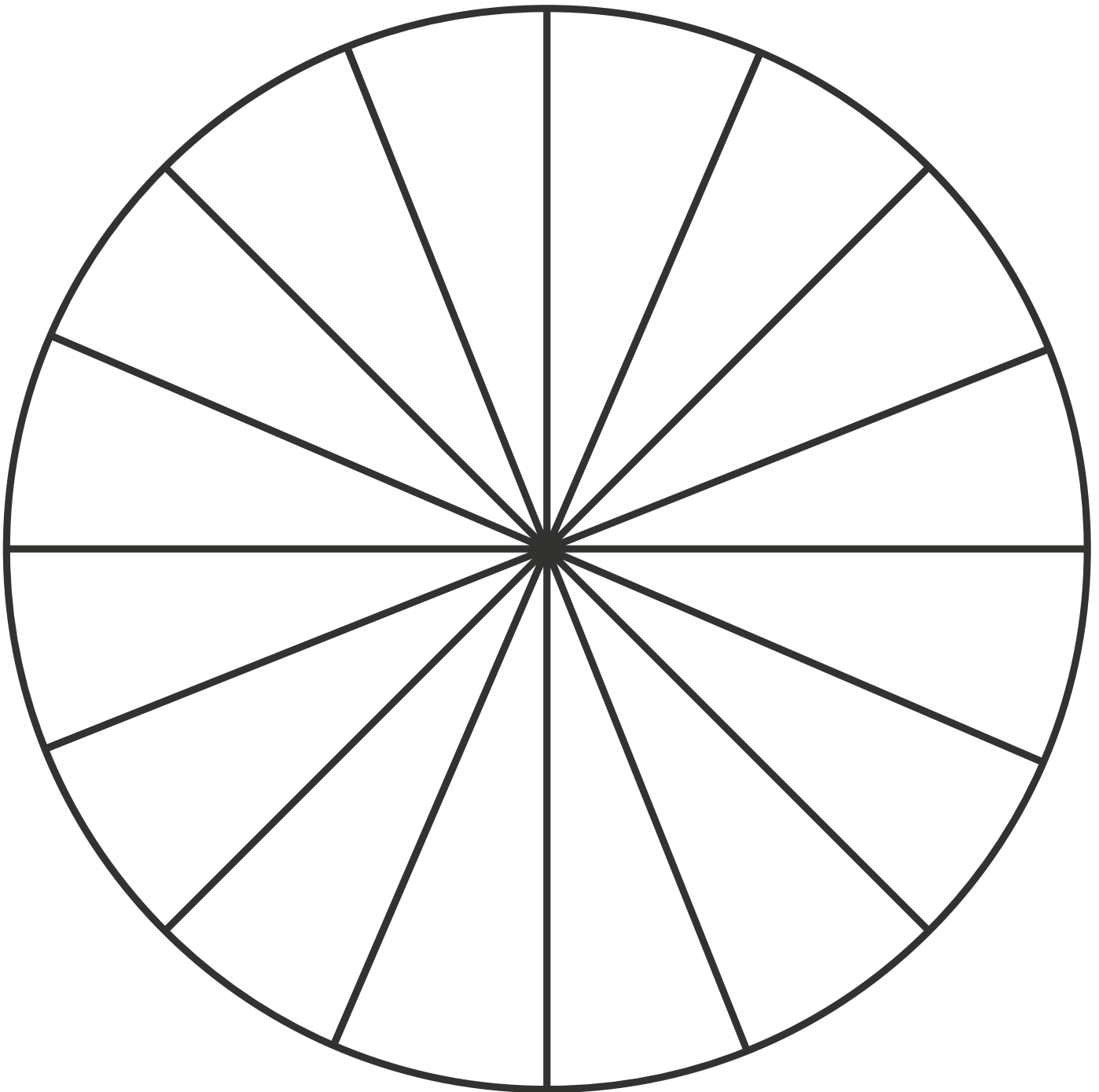
A large, empty light gray rectangular area intended for a marketing idea brain dump. This section is designed to be a workspace where users can freely generate and record their marketing ideas.

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

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

Specific Strategy Breakdown

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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)
20. Create an Experience Worth Talking About

JAN

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