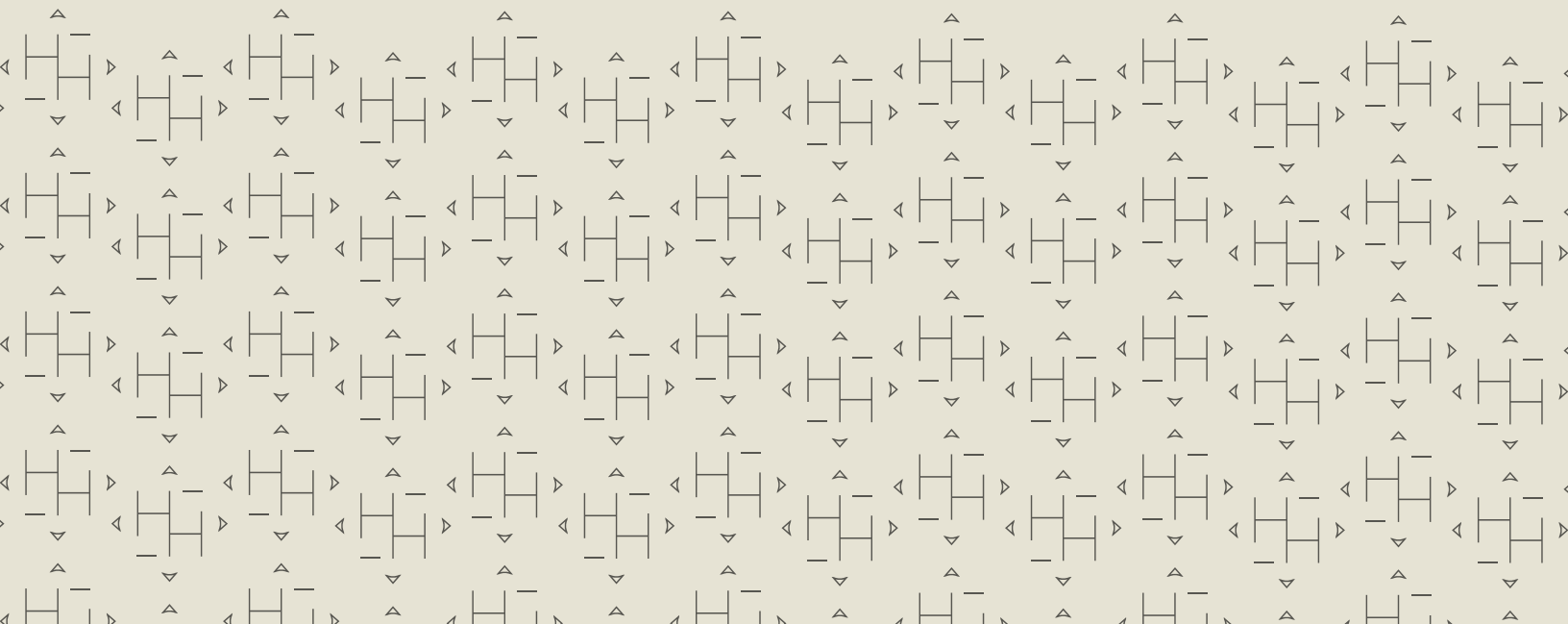


QUARTERLY PR & MARKETING PLAN: WORKSHEET

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Quarterly PR & Marketing Plan: Worksheet

Traditionally, PR and marketing plans get drafted at the start of each year or around specific outreach campaigns, like promoting a new product or brand initiative. These plans outline the strategies and tactics a business will use to reach their PR and marketing goals. They can be helpful in mapping out a top-line strategy, but they very rarely get revisited or built upon once the campaign is in place.

Here, we're taking a different approach. Instead of drafting your PR and marketing plan once a year or tying it to one business goal, we're using this quarterly worksheet to regularly assess the full ecosystem of your marketing and PR efforts. This worksheet will help you define your own success metrics, clearly identify which strategies and tactics are working vs. those that need to be rethought and map out your best steps for the quarter ahead.

Every three months, I recommend assigning three - four high-priority business goals. These include:

1. **A Growth Goal:** How do you want to see the business grow over the next three months? This can include landing a certain number of clients, selling a certain number of products or growing your revenue to a certain number.
2. **A Marketing Goal:** We define marketing as any activity that's primarily focused on selling a product or service. For example, if you are running LinkedIn ads, hosting monthly webinars or attending a trade show where you're explicitly trying to sell, these activities fall under the marketing bucket. What are you doing to directly sell your products and/or services this quarter?
3. **A PR Goal:** We define PR as any activity used to raise the overall visibility of your business. If you are speaking at an industry conference next month, co-hosting a networking event with another brand in the industry or placing a media story about your business's latest funding round, these would all be considered PR activities. What are you doing to introduce new people to your brand this quarter?
4. **A Your Choice Goal.** Maybe you want to complete a certification, find a new accountant or start using a new email delivery system. This goal captures anything outside of your growth, marketing and PR efforts that you want to make sure to prioritize.

Before we jump into the worksheet, check out the graphic on the next page which outlines the full PR and marketing ecosystem. While these activities used to more easily fall into distinct PR or marketing buckets, there's endless overlap between the two now. Almost everything you do to market the business will raise its visibility (PR), and it's very likely many activities you do to introduce the business to new people will also generate new customers (marketing).

With that said, I know many of my clients find it helpful to at least have a reference point for considering which of their efforts are more marketing-focused vs. PR-focused as they work through this exercise.

Quarterly PR & Marketing Plan: Worksheet

The activities on the left hand side are those we most often consider PR activities, and the ones on the right are our marketing activities. To help you determine which of your activities are more PR or marketing driven, consider: What is the intention of this activity? Am I doing this with the primary goal of selling, or am I doing this to network, build relationships and introduce the brand to new people in the hopes of raising the visibility of the business?



On the following pages you'll find several worksheets to help you intentionally assess the last quarter and think through your growth, marketing and PR goals, priority activities and the resources you need to execute over the next three months. As you move through each quarter, keep past worksheets handy so you can reference both the data and learning.

Let's dive in!

Quarterly PR & Marketing Plan: Worksheet

LIST YOUR GOALS FOR THE PREVIOUS QUARTER. WHERE DID YOU LAND?

No judgements here, we're just collecting data.

WHAT WORKED WELL?

- *What strategies or tactics clearly moved the needle?*
- *What wins are you celebrating?*

WHAT NEEDS RETHINKING?

- *What unexpected challenges got in your way?*
- *What strategies or tactics need some rethinking?*

Quarterly PR & Marketing Plan: Worksheet

WHAT ARE YOUR TOP FOUR BUSINESS GOALS THIS QUARTER?

1. Growth Goal
2. Marketing Goal
3. PR Goal
4. Yours to Choose

WHAT'S THE #1 QUESTION YOU WANT ANSWERED OVER THE NEXT THREE MONTHS?

For example: I want to better understand if I can grow my leads through LinkedIn or if I should focus my marketing efforts somewhere else.

WHAT'S ONE THING YOU CAN DO TO HELP YOU/THE BUSINESS STEP OUT OF OUR COMFORT ZONE THIS QUARTER?

What's something you think would benefit the business but you've been avoiding?

Goal #1: Growth Goal

WHAT IS YOUR GROWTH GOAL AND HOW WILL YOU DEFINE SUCCESS?

For example: I want to land two new consulting clients (20k+ each) in the beauty space focused on sustainability. Success is landing them!

WHAT PLATFORMS AND/OR STRATEGIES ARE YOU USING TO REACH THIS GOAL?

For example: Reach out to Molly, Nisha and Fred to connect with their HR teams; attend Beauty 2.0 conference and networking drinks; pitch eight companies from high-priority target list.

WHAT RESOURCES DO YOU NEED TO HELP EXECUTE?

I need a better system to track who I'm pitching and where I am in those conversations. Notion?

Goal #2: Marketing Goal

WHAT IS YOUR MARKETING GOAL AND HOW WILL YOU DEFINE SUCCESS?

For example: To create an SEO strategy that drives beauty industry leaders to the website. Success will be a strategy in place and three SEO articles live by the end of the quarter.

WHAT PLATFORMS AND/OR STRATEGIES ARE YOU USING TO REACH THIS GOAL?

For example:

- Platforms: Website and blog*
- Strategies: Hire consultant to optimize website and build SEO-focused content strategy; write three articles.*

WHAT RESOURCES DO YOU NEED TO HELP EXECUTE?

For example: SEO consultant

Goal #3: PR Goal

WHAT IS YOUR BRAND AWARENESS GOAL AND HOW WILL YOU DEFINE SUCCESS?

For example: Land two guest blogs/op-eds in leadership-focused publications. Success is landing them!

WHAT PLATFORMS AND/OR STRATEGIES ARE YOU USING TO REACH THIS GOAL?

For example: Top pitch targets: Fast Company, strategy + business, Authority Magazine, Quartz at Work

WHAT RESOURCES DO YOU NEED TO HELP EXECUTE?

For example: Review How to Pitch Guest Blogs in 2023 Guide & Workbook to help draft pitch.

Goal #4: Your Choice Goal

WHAT IS YOUR FOURTH GOAL AND HOW WILL YOU DEFINE SUCCESS?

This goal is optional and can include anything from "hiring an accountant" to "finding a better email marketing delivery system."

WHAT PLATFORMS AND/OR STRATEGIES ARE YOU USING TO REACH THIS GOAL?

WHAT RESOURCES DO YOU NEED TO HELP EXECUTE?