

PLANNING GUIDE

Use this guide to help you plan marketing activities that will support one of your business's goals. It will help you outline your plan, step by step, by considering the appropriate audiences, resources, logistics, and success metrics for each marketing tactic.

NAME

Brand
Name

Contact
Name

Date
Completed

OBJECTIVE

What are you trying to accomplish for your business by budgeting resources for marketing?

Our objective is to

during (timeframe)

while spending no more than

because

TACTICS

What marketing activities will you do that will help you achieve your objective?

Tactic		Tactic		Tactic		Tactic	
Audience		Audience		Audience		Audience	
<input type="checkbox"/> Internal sales team		<input type="checkbox"/> Internal sales team		<input type="checkbox"/> Internal sales team		<input type="checkbox"/> Internal sales team	
<input type="checkbox"/> Existing customers		<input type="checkbox"/> Existing customers		<input type="checkbox"/> Existing customers		<input type="checkbox"/> Existing customers	
<input type="checkbox"/> Owners		<input type="checkbox"/> Owners		<input type="checkbox"/> Owners		<input type="checkbox"/> Owners	
<input type="checkbox"/> Prospects		<input type="checkbox"/> Prospects		<input type="checkbox"/> Prospects		<input type="checkbox"/> Prospects	
<input type="checkbox"/> Former customers		<input type="checkbox"/> Former customers		<input type="checkbox"/> Former customers		<input type="checkbox"/> Former customers	
<input type="checkbox"/> Competitive owners		<input type="checkbox"/> Competitive owners		<input type="checkbox"/> Competitive owners		<input type="checkbox"/> Competitive owners	
<input type="checkbox"/> Other		<input type="checkbox"/> Other		<input type="checkbox"/> Other		<input type="checkbox"/> Other	
Timing		Timing		Timing		Timing	
Estimated Budget		Estimated Budget		Estimated Budget		Estimated Budget	
Measurement		Measurement		Measurement		Measurement	

LOGISTICS

What obstacles will you need to overcome? Do you already have specs from a publication? What deadlines are you aware of?
Do you have an audience list already?