



3-Month Marketing Plan

Cheat Sheet & Guide

3 -Month Marketing Plan

Date:

How much can you spend? Annual Budget: Monthly Budget: Month 1 : Month 2: Month 3:		What are you trying to achieve? Write your top-3 goals in the business right now. Goal 1 : Goal 2: Goal 3:	
How will you measure success or need for improvement? Write up to 3 KPI's 1 : 2: 3:		How will you communicate with your audience? List all your channels:	
What is happening?			
Month 1: Holidays: Notable business activities: 2 products/services you want to feature:	Month 2: Holidays: Notable business activities: 2 products/services you want to feature:	Month 3: Holidays: Notable business activities: 2 products/services you want to feature:	
How will you create value, connection and engagement with your audience? Write down ideas of things to share with your audience that are <u>not about selling</u> your products, services or business.			

3 -Month Marketing Plan: Cheat Sheet Guide

Print the 3-Month Marketing Plan Grid and follow along...

How much can you spend?

Write down your annual budget (total marketing spend for the year), then divide your annual budget by 12 for a rough monthly budget. Increase or decrease your monthly budget based on when you need to be more active or when you don't need to spend as much. Example: you will need more budget for product launches, important holidays, slow periods to boost sales, special events etc. Keep track of your spending and update your overall budget when you do your next planning session to recalibrate your monthly budgets!

What are you trying to achieve?

What are your current top-3 goals in the business? More revenue, more customers, selling to a new audience, improving current challenges etc. Think about the exact results you want to achieve. Make it measurable!

How will you measure success/need for improvement?

Create KPI's (Key Performance Indicators) to keep track of your marketing efforts! Example: you could look at increased number of sales on a promo item, more traffic to the website, new social media followers, more email sign ups, or look at your monthly revenue versus same time last year. After executing your monthly activities, look to see if your marketing efforts moved the needle. If not, go back to the drawing board. What did you do? What can you try doing differently?

How will you communicate to your audience?

What channels will you use to communicate with your audience (customers and potential customers)? List them all and include the specific social media platforms (Instagram, Twitter, Facebook...) as well as any touch point of communication you have with your customers. If you have a brick and mortar, include your physical location and your staff too!

What is happening?

When you plan your marketing, you want to make sure you look at your business activities and what you have planned and also what's happening in the world around you. What opportunities are available for you to "join the party, the conversation, the community" and be present? Beyond commercial initiatives, you'll be delighted to see how much more engagement there is around your brand and in turn, the new customers and sales you'll make from these efforts. Just remember to ask yourself what it's for, what you are trying to achieve and to measure your efforts.

A note on holidays: make sure they align to your brand and make sense for your business, otherwise, don't worry about them! Sometimes a simple greeting to your customers via email is enough and sometimes not doing anything is really the best course of action.

Under notable business activities, include things like: Launches, special events, slow period etc.

A note on: featured products/services... here we want you to focus your efforts so you can really see results. People (and your customers), have so much going on, they can only take in so many offers and messages. This is why we're suggesting 2 featured products/services a month MAX. What are your key messages related to these products? For example, if you are running a spa, you might feature massages and facials. The next month, you may focus on pedicures and manicures.

How will you create value, connection and engagement with your audience?

Write down ideas of things to share with your audience that are not about selling your products, services or business. For example, your story, behind the scenes, your employees, an event you created or attended, something inspiring, a great article you can share, tips & tricks. Once you've filled the box, use these ideas throughout your marketing communications. This is great content for social media but you can also turn them into interesting emails and other communications. Pro tip: Can any of these awesome stories make for a great article in the newspaper? Write a press release about it and contact your local newspaper to see if they'll publish it!