

CORE CONCEPT

What product or service are you offering?

Who is your ideal customer?

What main pain points are you solving?

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Where and how can you reach your ideal client?

My main value proposition is...

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CORE QUESTIONS

What problem is this
product/service solving?

Who is this product/service
for? (Target Audience)

What are the main aspirations & fears
of your target audience?

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How is your product/service helping the
target audience with their fears & goals?

How will you make your target audience
talk about and recommend your
product/service?

What assets are you building for your
brand?

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BRAND STRATEGY

BRAND CORE	Purpose:
	Vision:
	Values:

BRAND POSITIONING	Target Audience:
	Positioning: (Premium/Bespoke/etc)
	General Awareness:

BRAND PERSONA	Personality:
	Brand Voice:
	Tagline:

IDEAL CLIENT

Part 1

Name:	Gender:	Age:	Marital Status:	Income:	Education:
Location:		Personality:			
Hobbies:		What does he/she value:		Causes he/she supports:	
Main Goals & Aspirations:			Main Problems & Challenges:		

IDEAL CLIENT

Part 1

<p>What does he/she talk about:</p>	<p>What platforms does he/she visit:</p>
<p>Select the 3 most important aspects for your ideal client:</p> <div><input type="checkbox"/> Price</div> <div><input type="checkbox"/> Speed</div> <div><input type="checkbox"/> Flexibility</div> <div><input type="checkbox"/> Quality</div> <div><input type="checkbox"/> Service</div> <div><input type="checkbox"/> Dependability</div>	<p>Choose the platforms your ideal client uses the most:</p> <div><input type="checkbox"/> YouTube</div> <div><input type="checkbox"/> Instagram</div> <div><input type="checkbox"/> TikTok</div> <div><input type="checkbox"/> Facebook</div> <div><input type="checkbox"/> Pinterest</div> <div><input type="checkbox"/> Other:</div>
<p>Notes:</p>	
<p>Trusted marketing channels he/she trusts when making a buying decision (google, influencers, niche blogs, reviews, etc):</p>	<p>Marketing message that resonated with his/her personality and aspirations:</p>

MISSION STATEMENT

01 – Why does your brand/business do what it does?

Write your company's mission statement:

Our company's mission is to (02) and (03) because of (01)

02 – What do you want to help your customer achieve?

03 – What impact do you want to have in the community?

VISION STATEMENT

01 – What would the company be doing so you could consider it a success?

02 – What would the company's success look like financially?

03 – What will your customers think and feel about the company?

Write your company's vision statement:

Your mission statement was about 'now'. In contrast your vision statement is about what your company aims to be some point in the future.

MARKETING FUNNEL

AWARENESS & GETTING DISCOVERED

Goal/Outcome:

(ex. Get more viewers on my website)

Steps To Take:

(ex. Post more on social media)

BUILD TRUST AND INTEREST

Goal/Outcome:

(ex. Share educational and behind the scenes content)

Steps To Take:

(ex. Offer useful freebies)

TAKING ACTION

Goal/Outcome:

(ex. Sell premium course or workbook)

Steps To Take:

(ex. Create time limited promotions and offers)

NURTURE CUSTOMERS

Goal/Outcome:

(ex. Get repeat customers)

Steps To Take:

(ex. Offer upsells and exclusive affiliate programs)

A.I.D.A. MODEL

AWARENESS	INTEREST	DESIRE	ACTION
How will people know about your brand/service/product?	How will you get potential clients interested in trying your product/service?	How will you get potential clients wanting to try your product/service?	How will you get potential clients to commit and purchase your product/service?

WEBSITE CHECKLIST

- | | | |
|--|--|---|
| <input type="checkbox"/> Set Up Google Analytics | <input type="checkbox"/> Fix Broken Links | <input type="checkbox"/> Supply Content Customers Want |
| <input type="checkbox"/> Ensure Mobile Compatibility | <input type="checkbox"/> Look For Backlinks | <input type="checkbox"/> Make Your Menus User Friendly |
| <input type="checkbox"/> Improve Accessibility | <input type="checkbox"/> Disavow Toxic Backlinks | <input type="checkbox"/> Set Up Regular Health Monitoring |
| <input type="checkbox"/> Website Speed | <input type="checkbox"/> Competitor Analysis | <input type="checkbox"/> Check Google Is Indexing Correctly |
| <input type="checkbox"/> Remove Low Quality Pages | <input type="checkbox"/> Regularly Update Plugins | <input type="checkbox"/> Improve SEO On All Important Pages |
| <input type="checkbox"/> Sync All Social Media Sites | <input type="checkbox"/> Create Lead Capture Systems | <input type="checkbox"/> Ensure Pages & Blogs Link Each Other |

Notes:

LANDING PAGE

PLANNER

Landing page name:

Target group:

Main goal of the campaign:

Download:

How will you drive your audience to this page?
(How is it relevant to your target audience)

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KEYWORD RESEARCH

Determine what topics you want to rank for in the search engines. You can look at what your competition is ranking for and with what content to give yourself a head start. Think of what people looking for your product/service are searching for in Google? What do they want to know? What problems are they looking to solve?

Make a list of topics that are relate to your niche and relevant for your audience

- | | | | |
|---|---|---|---|
| ● | ● | ● | ● |
| ● | ● | ● | ● |
| ● | ● | ● | ● |
| ● | ● | ● | ● |

For the next section write down some keywords related to the above topics. You can do this by typing the topics (also try adding questions such as how, what etc) in google search box and then let google autocomplete the sentence (these are some high volume keywords that you can use). You can also search for a certain keyword and then scroll down to “related searches” for more ideas. Or you can use google keyword planner.

Aim for the long tail keywords (3+ words)

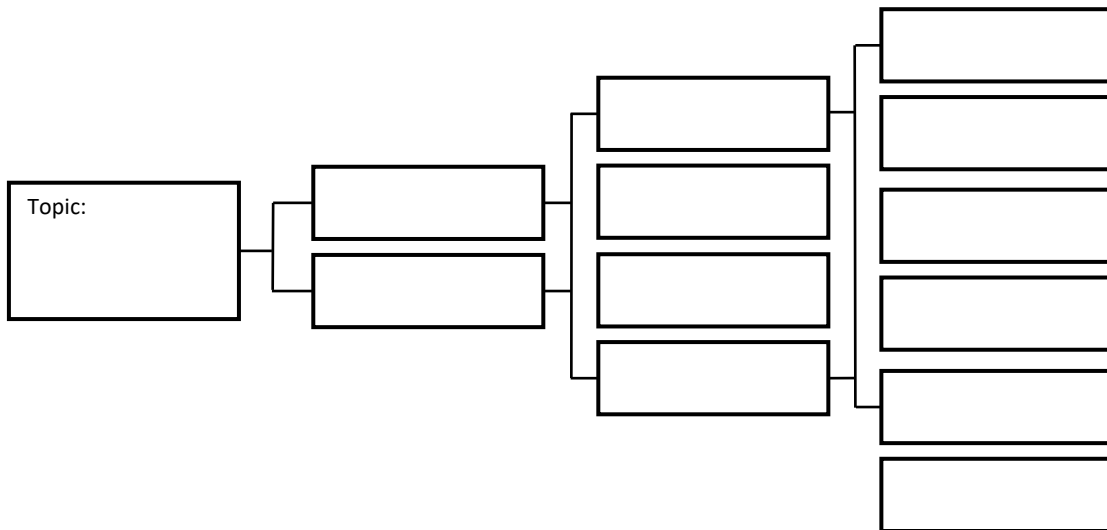
Make a list of keywords related to your service/product

- | | | | |
|---|---|---|---|
| ● | ● | ● | ● |
| ● | ● | ● | ● |
| ● | ● | ● | ● |
| ● | ● | ● | ● |

THE KEYWORD TREE

This is a worksheet for brainstorming lots of relevant long tail keywords & topics (or questions that people search for) related to your specific niche.

Use google keyword tool, google autofill, relevant searches, competitor's content and Quora questions as your guide.



COMPETITOR KEYWORDS

Use this worksheet to research what keywords and topics is your competition using and trying to rank for. This exercise is designed to just give you some ideas about what keywords and topics you could use on your own website. Think of what resources and articles you could write to provide more value to readers compared to your competition.

Competitor Name/Details:	Keyword/Topics:	How can I provide more value?
Competitor Name/Details:	Keyword/Topics:	How can I provide more value?
Competitor Name/Details:	Keyword/Topics:	How can I provide more value?

BUYERS JOURNEY

People will reach your website/blog in different stages of their buyers journey and therefore their willingness to commit to buying is different. That's why each stage of the buyers journey requires different types of content - from educational and comparisons to case studies and webinars. At the end of this worksheet, come up with specific content ideas for each stage of the journey. What can you teach your audience? What useful content can you give away for free?

01 Awareness

Content Ideas:

People are looking for different options for their problem or for the goal they have.
ex. searching for "What is branding?"

Types of Content:

- Educational Posts
- How To Videos
- Tutorials
- Social Media Posts

02 Consideration

Content Ideas:

People are comparing multiple options to choose the right one.
ex. searching for "What is the difference between branding and a logo design?"

Types of Content:

- Infographics
- Webinars
- Educational Posts
- Social Media Posts

03 Decision

Content Ideas:

People know what they need and are looking for a specific solution to their problem.
ex. searching for "Best personal branding experts in New York"

Types of Content:

- Demos/Trials
- Case Studies
- Customer Reviews
- Educational Posts

WEB & BLOG GOALS



- 01 It's important to keep in mind what the main purpose of your website is. By knowing your end goal, you can design all the content on your website to serve that main purpose. The end goal can be anything from making a sale to getting visitors to sign up for a newsletter.

What do you want to happen when you get a visitor to your website?

- 02 Before getting your visitors to the main goal of your website, you must attract them with compelling content. That's when your blog comes into play. Write down how your blog is going to be useful for your readers. What are you offering that they can't get anywhere else?

How is your blog going to serve its readers? What unique, helpful and entertaining content will you share?

CONTENT IDEAS

SOCIAL MEDIA		LEAD MAGNETS		BLOG CONTENT	
Share A Portfolio Item	Share Behind The Scenes Content	PDF Guide	eBook	Write About Your Process	Create A Tutorial
Share What Inspires You	Share A Client Testimonial	Planner	PDF List (ex. " 50 best email subject lines")	Share Your Insights	Write "Top 10" Style Blogs
Share A Helpful Tip In Your Niche	Share A Positive Affirmation	Useful Worksheet	Discount Code	Share A Portfolio Item	Do A Comparison Post
Share A Story Of Your Struggle	Do A "Ask Me Anything" Session	Assessment Tool	Useful Resource List	List Hacks & Time Savers	Write A Helpful Review
Share A Customer Photo Of Your Product	Share A Story Of How You Got Started	Quiz Or Survey	Free Trial	Report On Industry News	Post Video Content In Longform

CONTENT PLANNER

You can use these content planners for both social media posts and blog posts. The little prompts will help you come up with the general idea for your content (what's it about, what value does it offer, who needs it etc.) and a rough timeline for posting.

Post title:
Date to post:
Keywords:
Content ideas:

Post title:
Date to post:
Keywords:
Content ideas:

Post title:
Date to post:
Keywords:
Content ideas:

SOCIAL MEDIA STRATEGY

Social media channel:
Main goal:
Strategy / Content Ideas: (How are they relevant to your audience)
Keywords / Hashtags to use:

Social media channel:
Main goal:
Strategy / Content Ideas: (How are they relevant to your audience)
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MONTHLY CONTENT

PLANNER

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
30	31					

My Priorities:

Notes & Ideas:

EMAIL MARKETING PLANNER

Email title:

Main goal:

What content will be included:
(How is it relevant to your audience)

Call To Action:

Email title:

Main goal:

What content will be included:
(How is it relevant to your audience)

Call To Action:

Email title:

Main goal:

What content will be included:
(How is it relevant to your audience)

Call To Action:

EMAIL CAMPAIGN PLANNER

Campaign name:
Target group:
Main goal of the campaign:
What Content will be included in the sequence of emails? (How is it relevant to your target audience)

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Target group:
Main goal of the campaign:
What Content will be included in the sequence of emails? (How is it relevant to your target audience)

PPC STRATEGY

BUSINESS GOALS	BUSINESS GOALS	BUSINESS GOALS	BUSINESS GOALS
KPI			
Benchmark			
Target Amount			
Timeframe			

COMMUNICATION CHANNELS

Where do you want to connect with your consumers? List all of the owned, earned and paid channels you have/want to use to communicate with your customers. Some examples: Website, Facebook, Instagram (paid & organic), Blog, Search (SEO & SEM), etc.

PAID CHANNELS	ORGANIC CHANNELS

DATA COLLECTION

Digital marketing data is regularly spread across multiple locations. By taking stock on a regular basis you can see the health of your brand, and if your digital marketing activities are working.

WEBSITE STATS	Visits Per Month:
	Bounce Rate: (Lower is better)
	Time On Website: (Longer is better)

SOCIAL MEDIA STATS	Facebook Audience:
	Facebook Engagement:
	Instagram Audience:
	Instagram Engagement:
	LinkedIn Audience:
	LinkedIn Engagement:

LEAD GENERATION	Lead Captures Per Month:
	Emails Per Month:
	Converted Leads Per Month:

A/B TESTING

PLANNER

Test:
A Variant:
B Variant:
How long will the best run:
What does success look like:

Test:
A Variant:
B Variant:
How long will the best run:
What does success look like:

Test:
A Variant:
B Variant:
How long will the best run:
What does success look like:

COMMUNITY ENGAGEMENT PLAN

In order to identify where the best places to engage with your target niche are, you need to build a strong idea of where your target audience is likely to be already engaged with.

Location & Group Name:	Target Audience Size:	How engaged are your audience?
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SOCIAL LISTENING

Use this worksheet to see what influencers and groups are saying within your target niche. Using these topics for social media posts, blog posts, and landing pages are likely to result in the highest ROI. Think of what resources and articles you could write to provide solutions for these issues.

[illegible]

INFLUENCER OUTREACH

Influencers are the main spokespeople for your target niche. If you can engage with them to promote your product, for free or paid, you can not only make a lot of people aware, but these people are likely to be far warmer leads.

Influencer name:
Main Channel:
What type of content do they produce: (How is it relevant to your audience)
Content they could produce for you:

Influencer name:
Main Channel:
What type of content do they produce: (How is it relevant to your audience)
Content they could produce for you:

Influencer name:
Main Channel:
What type of content do they produce: (How is it relevant to your audience)
Content they could produce for you:

MARKETING CHECKLIST

Online Marketing

- | | |
|---|--|
| <input type="checkbox"/> Website/Blog | <input type="checkbox"/> Ad Networks |
| <input type="checkbox"/> Email Newsletter | <input type="checkbox"/> Social Media |
| <input type="checkbox"/> Influencer Marketing | <input type="checkbox"/> Webinars |
| <input type="checkbox"/> Google Ads | <input type="checkbox"/> SEO |
| <input type="checkbox"/> Paid Social Ads | <input type="checkbox"/> Affiliate Marketing |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |

Offline Marketing

- | | |
|--|--|
| <input type="checkbox"/> Informative Flyer | <input type="checkbox"/> Networking Events |
| <input type="checkbox"/> Trade Shows | <input type="checkbox"/> Radio/TV Ads |
| <input type="checkbox"/> Magazine Ads | <input type="checkbox"/> Direct Mail |
| <input type="checkbox"/> Fairs/Live Events | <input type="checkbox"/> Telemarketing |
| <input type="checkbox"/> Billboards | <input type="checkbox"/> Word Of Mouth |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |

Notes:

MARKETING CHECKLIST

Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	

Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	

Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	

Channel:	Est. Cost:	Content Ideas:
Pros:	Cons:	

MARKETING TACTICS

AWARENESS	MARKETING TACTICS	MONTHLY COST
Social Media		
Blog Content		
Email Marketing		
SEO		
Paid Ads		

MESSAGING STRATEGY

Part 1

Main Value Proposition:	Target Audience:	Key Benefits:	Elevator Pitch: (A 30 second summary of main value you provide, key benefits, proof of competence and company mission)
Company Mission:			
Tag Line/Slogan:	Company Personality:	Proof Of Competence: (A metric or result you have helped your customers achieve)	

MESSAGING STRATEGY

Part 2

<p>Product/Service:</p>	<p>Customer Needs:</p>	<p>Differentiating Message: (How you're different)</p>	<p>Main Message: (A tagline or headline you can use in messaging to describe how you're different from the competition and how you solve a customers need.)</p>
<p>Target Audience:</p>	<p>Key Benefits</p>	<p>Tagline/Slogan:</p>	

COMPETITOR ANALYSIS

Competitor Name:	How are they reaching customers:	How are they pricing their product/service:
Product/Service:		
What problems are they solving for their clients:	How are they actively marketing:	What are they good at:
	What kind of content are they producing: (blog posts, social media, etc)	What you can do better: