



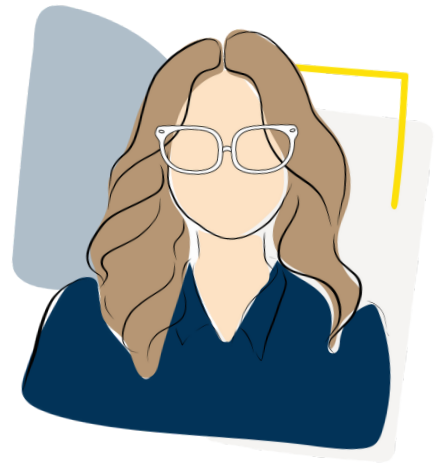
THE STRONGER BUSINESS

# MARKETING PLAN

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# WELCOME!

You're committed to building a stronger business—one that helps you achieve your financial goals while running smoothly and predictably. You're building a business that has a positive impact on the community you serve and the team that works with you, as well as your own personal growth and self-expression.



And to do it, you need a plan.

This marketing plan template is 1 of 15+ templates inside the Stronger Business Playbook at The What Works Network. Once you've completed it, you'll have a big picture plan for a comprehensive marketing system for your stronger business that you can start operationalizing it using the Standard Operating Procedure & Project Brief templates we've also included.

Here's to building a stronger business!

*Tara McMullin*

Founder & Host, What Works  
Co-Founder, YellowHouse.Media

## JOIN US AT THE WHAT WORKS NETWORK

*We're building stronger businesses together. Get access to the complete Stronger Business Playbook, a global community of experienced small business owners, and monthly support events.*

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# HOW TO CREATE YOUR MARKETING PLAN

**Your marketing plan should meet 3 needs for your business:**

- growth & discovery
- nurturing & engagement
- evaluation & conversion

**Growth & discovery** marketing comprises the marketing activities that put your business in front of new eyes and grow your audience. It helps you earn the attention of folks who can eventually become buyers.

**Nurturing & engagement** marketing includes the activities that strengthen relationships with people who are already paying attention. It educates them on their problems and potential solutions. It helps them form an idea of your brand and what you stand for. It speaks to their needs and concerns directly.

**Evaluation & conversion marketing** is made up of the activities that guide potential buyers toward a sales conversation or decision. It introduces your offer, addresses potential objections, elucidates how your offer is different from the competition, and shares stories of people you've worked with before.

Depending on the maturity of your business, you might deal with a number of common challenges related to not having your marketing plan fully fleshed out across these 3 areas:

**Growth Without Conversion:** You have a large audience but sales are hard to come by. Your conversion rates are low. Those who do buy are only aware of "superficial" problems or desires.

**Nurturing Without Growth:** Your audience is "tapped out." Those who will buy have already bought. Sales may start strong but slow down over time.

**Conversion Without Nurturing:** Your audience doesn't "get" your offer. You field a lot of questions and have higher refund rates. Buyers are often unprepared for what they've bought.

Is your business suffering from one of these challenges? Which part of your marketing plan needs some work based on that challenge?

#### NOTES

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**Note that this Marketing Plan template isn't geared to planning out or learning a particular system for marketing** (i.e. automated email funnel or a webinar system or Facebook advertising). Instead, it's designed to help you identify where you want to put your energy so that you can better direct yourself to learn or build the systems that are going to work best for you.

The template below includes suggestions for activities that fit into each of the 3 core marketing needs for your business. But of course, this is not an exhaustive list! Your business might benefit from a completely different tactic or approach.

Try not to focus on the marketing activities or tactics themselves and, instead, aim to identify how your business needs to connect with people at each stage of the process.

Also, don't assume that just because we've broken out each of these 3 core needs into their own separate section that it requires you to come up with a whole system for each or that moving customers through these stages will take a long time.

When each of these needs are met (for instance, in a webinar or an affiliate marketing opportunity), a potential customer can turn into a buyer very quickly.

**Finally, aim to meet each marketing need as simply as possible.**

Your business likely doesn't need 5 growth & acquisition systems, 3 nurturing & engagement systems, and 4 evaluation & conversion systems! Focus on 1 high-impact activity for each need—or find a way to address multiple needs in one activity.

**Once you've created your Marketing Plan, it's time to operationalize it.**

- Use the Standard Operating Procedure template to flesh out any recurring systems that need to be better defined or optimized
- Use the Project Brief template to document one-off projects that need to be completed to fulfill your plan

#### NOTES

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# MARKETING PLAN

## GROWTH & DISCOVERY

*Marketing that grows your audience*

Who do we want to attract to our audience?

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What is top of mind for these people right now?

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What will we do to get in front of new potential customers?

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How will we connect with them based on the questions, needs, or goals that are top of mind for them?

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## SAMPLE MARKETING ACTIVITIES

- ☐ **Going on a podcast to talk about a common problem you solve**  
Your business is introduced to a new audience and you connect with them by sharing how to overcome a common challenge.
  
- ☐ **Writing articles based on common search queries**  
Grab the attention of people searching for solutions or questions with informative & comprehensive articles that show off your unique point of view
  
- ☐ **Creating social media content that's designed to be shared**  
When your content is shared, it's introduced to new people who haven't come in contact with your brand before.
  
- ☐ **Speaking at conferences about a goal you can help with**  
Speaking on stage or giving workshops gives you instant credibility with a brand new audience of engaged potential customers

### NOTES

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## NURTURING & ENGAGEMENT

*Marketing that builds your relationships with potential customers*

What will we do to build our credibility as a brand?

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How is what we offer different from our competition or solutions our audience has tried in the past?

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How will we educate our audience beyond their initial pain points or goals?

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How will we help them see what's possible?

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## SAMPLE MARKETING ACTIVITIES

- ☐ **Writing a newsletter that connects common pain points to solutions you provide**  
Newsletters are a reliable way to regularly communicate with people who have expressed interest in what your business does
- ☐ **Hosting a podcast that builds a relationship with listeners**  
Podcasts create a sense of intimacy with your potential customers and give you a platform for sharing deeper, more valuable content
- ☐ **Creating social media content that's designed start a conversation**  
When your content is designed to get a response, you open a dialogue between you and your potential customers
- ☐ **Presenting a webinar to share your unique point of view**  
Workshops, roundtables, and webinars give you a chance to engage your audience on a deep level with personal responses to questions & chat messages

### NOTES

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## EVALUATION & CONVERSION

*Marketing that leads to a sales conversation*

How are we educating prospects about our offer?

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How are we differentiating our product or service?

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How are we helping prospects make a decision to buy our offer over another?

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What transformation are we promising?

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## SAMPLE MARKETING ACTIVITIES

- ☐ **Hosting a demo of your product or service**  
Showing off your product or service gives people a glimpse of how they could use it to get results
- ☐ **Sharing customer testimonials**  
The best people to speak for your product or service are the people who love it. Don't be afraid to share their enthusiasm!
- ☐ **Creating social media content that's designed tell people about your offer**  
Some of your social media content should directly & explicitly share your offer and invite people to learn more or buy.
- ☐ **Writing case studies**  
Case studies are valuable content in and of themselves because they often highlight insider information on how problems are overcome but they're also great for showing off the results of your offer

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# STANDARD OPERATING PROCEDURE

A Standard Operating Procedure is the process you use to complete a given task in the same way, every time.

Every business has unique processes that are core to its administration, marketing, value delivery, team management, etc... An SOP is how you document those procedures so that you can streamline and improve those processes or delegate them to a team member.

When we create an SOP, we like to include any links, templates, or commonly used information directly in the procedure so that we have easy access to it.

Complete an SOP for every process your business uses. Instead of trying to create the process from scratch or by memory, document the procedure as you do the task. This will give you the most accurate set of steps and help you incorporate this work into your current workload.

Tip: you don't have to be the person to create all the SOPs. Ask your team members to create an SOP the next time they do a task that is often repeated.

## STANDARD OPERATING PROCEDURE

GOAL: What is the desired outcome of this procedure?

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PURPOSE: Why does this procedure exist? Why do we do it this way?

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OWNER: Who owns this procedure? Is anyone else involved? Who can the owner go to if help is needed?

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Outline the steps of the procedure on the next page.

## NOTES

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FROM THE STRONGER BUSINESS PLAYBOOK

## STANDARD OPERATING PROCEDURE

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# PROJECT BRIEF

**A project is a concrete unit of work on your business.**

Projects are things like redesigning your customer onboarding system, building a new product, launching your podcast, completing a marketing challenge, or taking a course to learn a new skill.

They are specific, actionable, and have a clear endpoint.

Projects typically take 4-8 weeks to complete. If you anticipate that a project will take more time than that, we recommend breaking down into smaller projects.

Your Project Brief is an opportunity to slow down and get your head around your new project. It helps you decide on an endpoint, take your resources into account, connect the work you're doing to your Strategic Priorities & vision.

It's also a great tool for getting buy-in from your team and determining what support you might need from others to get the job done.

Use this Project Brief Template before starting work on any project.

We use it as part of our quarterly planning process and complete a brief when we add projects to the plan. You might also use it as part of an annual or mid-year planning/review process.

## PROJECT BRIEF

Name of project:

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Important dates:

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Budget:

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How will I know when this project complete? How will I measure the results?

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How long will the project take to complete?

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Why does this project matter? How does this project help the company fulfill our Strategic Priorities & get closer to our Vision?

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How can the team lend support? How can colleagues or peers lend support?

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What resources are we devoting to this project?

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Outline the high-level tasks required to complete this project on the next page.

#### NOTES

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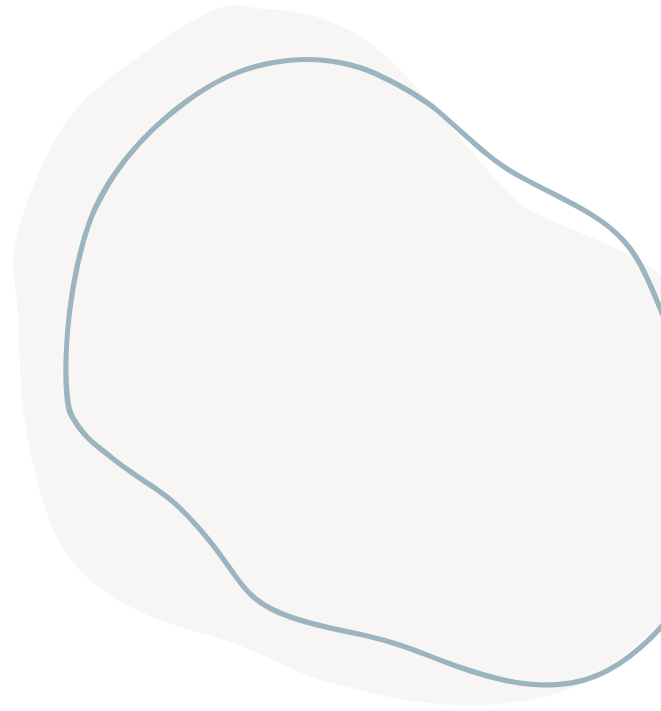
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## PROJECT BRIEF

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### NOTES

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# GET THE COMPLETE **STRONGER BUSINESS** PLAYBOOK

We're building stronger businesses together. Join The What Works Network and get the tools & support you need to run a more resilient & sustainable business.

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