

# Marketing Plan Checklist

Build a simple, complete marketing plan for the next 12 months.

Marketing works best when it is planned. Complete each step, then put your plan on one page your whole team can follow.

## 1 Know your customer

- ☐ Write 1–3 customer personas
- ☐ List their problems, goals and where they spend time
- ☐ Ask existing customers why they chose you

## 2 Your message

- ☐ Write your positioning statement
- ☐ Create 3 key messages and proof points
- ☐ Check your brand looks consistent everywhere

## 3 Channels

- ☐ Choose 2–3 main channels (social, email, search, events, partners)
- ☐ Set up or update your website and Google Business Profile
- ☐ Plan email marketing to past and potential customers
- ☐ Identify referral partners

## 4 Plan & budget

- ☐ Set SMART goals (e.g. 20 new customers per month)
- ☐ Create a 12-month marketing calendar
- ☐ Set a monthly budget per channel
- ☐ Decide who does what and when

## 5 Measure

- ☐ Choose 3–5 key numbers to track
- ☐ Set up website analytics
- ☐ Review results monthly and adjust

### My notes

### Want expert help with this?

- Marketing Plan: personas, channels, calendar and budget
- Social Media Management: we create and post for you
- Small Business Marketing Toolkit (Canva templates)



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