



THE
BUSINESS
GOALS &
MARKETING
Strategy
WORKBOOK

THIS WORKBOOK
BELONGS TO:

SECTION 1

Section 1

SETTING GOALS & GAINING CLARITY IN YOUR BUSINESS

SETTING CLEAR GOALS

1, 3 & 5 YEAR GOAL PLAN

Okay, so I bet you are super excited to dig into this workbook. I am excited for you too! I really want you to take a moment and set your 1,3 & 5-year goals. This is something you can always look back to in order to help you gain clarity and focus on your true mission instead of pivoting and losing traction.

Writing your goals down is like setting in stone what you want to achieve and putting it out there in the world. As your business grows your goals might shift but they should always come back to these root goals.

These goals should:

- + Help you measure the success of your efforts
- + Be realistic and achievable
- + They are relevant to your brand & business

1 YEAR GOAL

BRAINDUMP

3 YEAR GOAL

BRAINDUMP

5 YEAR GOAL

BRAINDUMP

TRACKING METRICS

Write down the goals & metrics you want to track over the next 6 months. Make them as realistic as possible. Print multiple pages out to use in the future. You also have a blank page to track any other metrics you would like.

START DATE -

END DATE -

INSTAGRAM

CURRENT FOLLOWERS:

6 MONTH FOLLOWERS GOAL:

WEEKLY POSTING GOAL:

REELS/IGTV & STORIES POSTING GOAL:

FACEBOOK

CURRENT FOLLOWERS:

6 MONTH FOLLOWERS/GROUP MEMBER GOAL:

WEEKLY POSTING GOAL:

LIVE & STORIES POSTING GOAL:

PINTEREST

CURRENT FOLLOWERS:

6 MONTH FOLLOWERS GOAL:

CURRENT MONTHLY VIEWERS:

WEEKLY PIN GOAL:

WEBSITE

MONTHLY PAGE VIEWS GOALS:

MONTHLY BLOG POST GOAL:

REVENUE GOAL:

CONVERSION RATE GOAL:

EMAIL LIST

CURRENT SUBSCRIBERS:

6 MONTH GOAL:

OPEN RATE GOAL:

HOW MANY EMAILS WILL I SEND A MONTH:

TRACKING METRICS

SETTING & TRACKING METRIC GOALS

START DATE -

END DATE -

SWOT ANALYSIS

STRENGTHS



WEAKNESSES



OPPORTUNITIES



THREATS



CURRENT SUCCESS

Take a chance to look back at your business (if it is already up and running), what is working well and what is not working well. Think about the reason behind these answers. This will help you continue to practice what is doing well and to either work on or stop what is not doing well.

WHAT WORKED WELL

WHY DID THESE THINGS WORK WELL?

WHAT DIDN'T WORK WELL

WHY DIDN'T THESE THINGS WORK WELL?

INCOME & EXPENSE YEARLY TRACKER

Reflect on your income & expenses for the year.

MONTH	INCOME	EXPENSES	PROFIT	COMMENTS
JANUARY				
FEBRUARY				
MARCH				
APRIL				
MAY				
JUNE				
JULY				
AUGUST				
SEPTEMBER				
OCTOBER				
NOVEMBER				
DECEMBER				
TOTAL				

WHAT WERE THE BEST & WORST MONTHS AND POSSIBLE REASONS WHY?

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SECTION 2

Section 2

BUSINESS OVERVIEW & MARKETING STRATEGY

BUSINESS PLAN SUMMARY

BUSINESS NAME:

WEBSITE

CONTACT

Email -

Phone -

SOCIAL MEDIA HANDLES

Facebook -

Instagram -

Twitter -

Linkedin -

Pinterest -

Other -

PRODUCTS/SERVICES

Give a brief description of your products and/or services

WHAT IS YOUR VISION FOR YOUR BUSINESS

Where do you see yourself going/how do you plan to grow?

WHAT PROBLEM DO YOU SOLVE

What pain point, stressor or problem are you solving in your ideal clients life

WHAT IS YOUR SOLUTION

How does your product/service solve this specific problem, stressor or pain point in their life

BUSINESS PLAN SUMMARY

WHAT IS YOUR MAGIC POTION

What makes your solution valuable? Why is it better than your competitors? What is your secret sauce, genius idea or magic potion? Why are your clients choosing you?

COMPETITORS

Think of 2 main competitors. Briefly write down what you do that they don't and what competitive advantage, if any, that they have.

MEASURING SUCCESS

How will you measure and determine success in your business? What metrics will you use?

CURRENT STATUS

Where are you currently in your business? What does your team look like and What is your next immediate action step?

SALES & MARKETING STRATEGY

HOW AND WHERE WILL YOU SELL YOUR PRODUCT/SERVICES?

WHO BUYS YOUR PRODUCT/SERVICE AND WHAT PROBLEM DO THEY SOLVE WITH IT?

WHAT IS THE SIZE OF YOUR MARKET AND THE CURRENT DEMAND?

WHERE ARE YOUR COMPETITORS SELLING AND MARKETING THEIR PRODUCT/SERVICES?

SALES & MARKETING STRATEGY

LIST YOUR KEY SELLING POINTS HERE

**BRIEFLY SUMMARIZE WHAT TESTIMONIALS OR REVIEWS YOU WILL USE TO BACK-UP YOUR
EXPERTISE**

SALES & MARKETING STRATEGY

SALES & MARKETING STRATEGY OVERVIEW

TRAFFIC SOURCE - HOW WILL YOU GET IN FRONT OF YOUR AUDIENCE? GO BACK TO YOUR IDEAL CLIENT AND THINK ABOUT WHICH PLATFORMS THEY WILL BE HANGING OUT ON.

- | | |
|--|--|
| <input type="checkbox"/> FACEBOOK PAGE | <input type="checkbox"/> GOOGLE + |
| <input type="checkbox"/> FACEBOOK ADS | <input type="checkbox"/> OTHER PAID ADS: |
| <input type="checkbox"/> PINTEREST | <input type="checkbox"/> PODCASTS |
| <input type="checkbox"/> INSTAGRAM | <input type="checkbox"/> INTERVIEWS |
| <input type="checkbox"/> LINKEDIN | <input type="checkbox"/> TELEVISION |
| <input type="checkbox"/> FACEBOOK GROUPS | <input type="checkbox"/> EMAIL MARKETING |
| <input type="checkbox"/> YOUTUBE | <input type="checkbox"/> |
| <input type="checkbox"/> GUEST POSTS | <input type="checkbox"/> |
| <input type="checkbox"/> BLOG POSTS | <input type="checkbox"/> |

HOW ARE YOU GOING TO BUILD TRUST, A RELATIONSHIP AND PROVIDE THEM WITH VALUE?

- | | |
|---|--|
| <input type="checkbox"/> BLOG POSTS | <input type="checkbox"/> IG LIVES |
| <input type="checkbox"/> FACEBOOK POSTS | <input type="checkbox"/> TWITTER UPDATES |
| <input type="checkbox"/> INSTAGRAM POSTS | <input type="checkbox"/> |
| <input type="checkbox"/> FACEBOOK GROUP UPDATES | <input type="checkbox"/> |
| <input type="checkbox"/> WEEKLY NEWSLETTER | <input type="checkbox"/> |
| <input type="checkbox"/> VALUE PODCAST | <input type="checkbox"/> |
| <input type="checkbox"/> VIDEO | <input type="checkbox"/> |
| <input type="checkbox"/> IGTV | <input type="checkbox"/> |
| <input type="checkbox"/> FB LIVE | <input type="checkbox"/> |

MONETIZATION - WHAT ARE YOU SELLING?

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> EBOOK | <input type="checkbox"/> SERVICE: |
| <input type="checkbox"/> WEBINAR | <input type="checkbox"/> DIGITAL PRODUCT: |
| <input type="checkbox"/> COURSE | <input type="checkbox"/> PHYSICAL PRODUCT: |
| <input type="checkbox"/> MEMBERSHIP | <input type="checkbox"/> AFFILIATE PROGRAM: |

PLANNING MY YEAR

MONTH-BY-MONTH

JANUARY

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

FEBRUARY

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

MARCH

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

APRIL

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

PLANNING MY YEAR

MONTH-BY-MONTH

MAY

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

JUNE

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

JULY

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

AUGUST

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

PLANNING MY YEAR

MONTH-BY-MONTH

SEPTEMBER

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

OCTOBER

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

NOVEMBER

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

DECEMBER

MAIN CONTENT TOPIC OF THE MONTH:	HOW WILL I MEASURE THIS MONTHS SUCCESS
PRODUCT OF THE MONTH:	
BLOG POSTS TO WRITE:	
PLATFORM TO FOCUS ON:	
NEW PRODUCTS/SERVICE TO INTRODUCE:	

SECTION 3

Section 3

CRAFT OUT YOUR MISSION STATEMENT

MY MISSION STATEMENT

Your mission statement is essentially what you do, why you do it, how you do it, and whom you do it for. Your mission statement represents the purpose of your business. We going to start by determining this. By knowing our mission statement all our marketing and business efforts will be done towards a common goal.

Your mission statement needs to be:

Other's can easily understand & explain
Not confused with your vision statement

Clear & simple, avoid fancy words
Is recognizably yours

Draft the mission statement of your business/blog/shop on the next page.

INCORPORATE THE FOLLOWING:

- + What you do
- + How you do it
- + Whom you are doing it for
- + The value you provide/problem you solve

A FEW QUESTIONS TO HELP YOU

- + Why are you doing what you do?
- + What is the main problem you aim to solve?
- + Who do you want to help and who will your business serve?
- + What are you passionate about in your business?
- + How do your services/products serve your ideal clients?
- + What core values and beliefs is your business based upon?
- + What competitive advantage do you hold?
- + How will you measure success and continue to grow?

SECTION 4

Section 4

FIGURE OUT YOUR
IDEAL CLIENT &
HOW TO SERVE
THEM

MY IDEAL CLIENT

What is your ideal client

The second thing I want to walk you through is, finding your ideal client avatar! It is the person that NEEDS your products or services. What you provide solves a problem to them and meets a specific need.

It is NOT only the person that wants to work with you but also the person YOU want to work with.

They are the people who want to buy your paid offer, will be opening those emails, and liking those Instagram posts. They are not just followers but your fans as well!

Why is it important in marketing:

- ✗ Narrows the scope of your efforts & enables you to use marketing and resources efficiently!
- ✗ Stronger leads. You know the people you are connecting with you are truly interested in what you have to offer.
- ✗ You understand what they need and can really tap into their stressors, this means you will be able to communicate with them in a way that they will connect with.
- ✗ Social media becomes easier. This was a BIG one for me. Once I knew exactly who my ideal client was, I was able to speak to them in a way that they could relate and connect with. I was able to incorporate story-telling that converted because I knew exactly WHO I was talking to and what specific words & phrases would connect with them.

MY IDEAL CLIENT

TIPS & STRATEGY

strategy 1

USE A CURRENT CLIENT, PREVIOUS CLIENT OR
SOMEONE YOU WANT TO WORK WITH IN THE
FUTURE

strategy 2

USE THE PAST VERSION OF YOURSELF. IF YOUR
SERVICE/PRODUCT HELPS YOUR CLIENTS WITH
SOMEONE THAT YOU PREVIOUSLY STRUGGLED
WITH THEN THIS IS A GREAT STRATEGY TO
USE!

STRATEGY 1

Interview a few people that you think might be your ideal clients or who have purchased from you in the past. Get on a zoom call or Skype if you cannot meet them in person. If at all possible, meeting them in person would be great because you will be able to see EXACTLY how they act. Ask them what their day-to-day life looks like. Breakfast? Morning routine? Commute? Work? Stay at home? Find out what they do by the hour. This is going to help you when crafting your content on social media. It will help you speak and develop a brand voice and story in a way that connects very strongly with your ideal client.

For example, if you know your ideal client has smoothies instead of coffee every morning you can write something like this in an Instagram caption "Okay guys, grab your smoothie, switch off the news and take a minute to read about why my latest goal-setting planner is going to change your life." Do you see what I did there? I knew 2 things about my client. They drink smoothies and watch the news so when they read this specific post they feel as if I am speaking directly to them and grabs the interest straight away!

MY IDEAL CLIENT



STRATEGY 2

Because we often create solutions to our problems, thinking about who we once were before our business might just be who our ideal client is now. For example, In my own business, I struggled with Pinterest so I took courses, learned all the things I needed to, and ended up growing my Pinterest to over 200 000 monthly viewers in a matter of weeks.

I cracked the code and could successfully grow my Pinterest account with ease.

That is why I made my Pinterest planner and workbook. It is a workbook that helps online entrepreneurs not only plan all aspects of Pinterest but also gives them to-the-point tips, tricks, checklists, and my exact strategy. It is affordable and I know if anyone who purchases the workbook implements the strategies and puts in the effort that they will without a doubt succeed.

The person I was before I learned anything re Pinterest is pretty much my ideal client for that product. I can now go and look at my pain points and struggles during this time and think about how I can translate that into words that will speak to my audience in the same situation now.

If you created a product or service in your business that solved a problem you once had then looked at how you felt, things you did, and what frustrated you before this specific product/service was created is a great way to figure out who your ideal client is now.

IDEAL CLIENT

DEMOGRAPHICS

Age -

Gender -

Education Level -

Location -

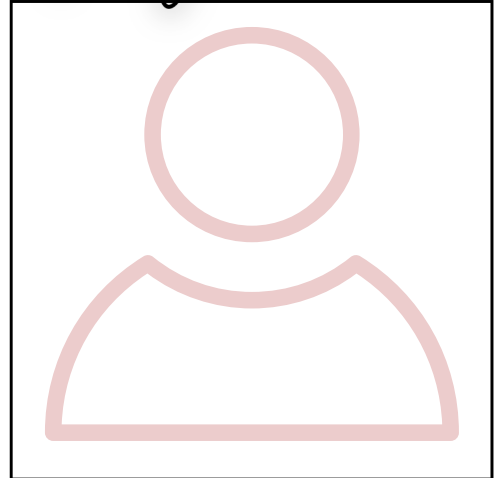
Occupation -

Average Income -

No. of children -

Marital Status -

Image here



PSYCHOGRAPHICS

What are their hobbies and interests?

What are their values?

Where do they shop?

IDEAL CLIENT

PSYCHOGRAPHICS

What tv shows/books do they read?

What social media platforms are they mostly on?

What strong beliefs would they have?

What websites do they love?

What are their pain points/stressors?

What is keeping them up at night?

IDEAL CLIENT

MY IDEAL CLIENT - DAY-TO-DAY LIFE

6am

7am

8am

9am

10am

11am

12pm

1pm

2pm

IDEAL CLIENT

MY IDEAL CLIENT - ZONING IN

3pm

4pm

5pm

6pm

7pm

8pm

9pm

WHAT WOULD THEY LIE IN BED AND STRESS ABOUT AT NIGHT/WHAT PROBLEM DO THEY NEED SOLVING?

IDEAL CLIENT CLARITY

MY IDEAL CLIENT - ZONING IN

What does my ideal client struggle with before they work with me?

Why is this is a struggle & what makes them want to overcome this struggle?

How does my product/service solve this pain point?

How do I want my ideal client to feel after working with me?

IDEAL CLIENT CLARITY

MY IDEAL CLIENT - ZONING IN

what does your ideal client have to believe or know before they work with you?

What are 4 things that could potentially be stopping them from working with you or becoming a customer/client?

What kind of change does your ideal client want to see in their lives after working with you?

IDEAL CLIENT OFFERS

SIGNATURE OFFER

Once you have figured out your ideal client it is best to focus on a signature offer for that client and base all your efforts on this signature offer. By doing this you will be able to market and sell your product/service way more efficiently.

MY MAIN OFFER

HOW THIS SPECIFIC OFFER (SERVICE OR PRODUCT) SERVES MY IDEAL CLIENT



IDEAL OFFERS

MY OFFERS = CLIENTS NEEDS

You will most likely want to have more than one product or service as your business grows and can use this as needed. You can add offers here and then explain how they are allocated to a particular ideal client as well as how it will serve this client.

offer 1

offer 2

offer 3



NOTES & *Inspiration*



