Marketing planning worksheet

Complete this worksheet with your team before choosing channels or requesting a proposal. Keep the plan focused on one audience and one useful business outcome.

1. Establish the starting point

Business / organisation

Plan owner

Planning period

First review date

Primary business goal - be specific

Audience, buying situation and location served

Service / offer and the customer question it answers

Current baseline - period, enquiries / sales and known limitations

Capacity, approval, content or technical constraints

Choose channels and measures

Select channels because they support a clear customer decision. Record the source and reliability of each measure before setting a target.

2. Connect activity with evidence

Channel priorities - SEO, paid search, content, social or website improvements

Why these channels fit the audience and buying stage

Success signals - define a qualified enquiry or other useful outcome

Measurement sources - events, CRM, mailbox, calls or sales records

Optional planning budget / resource limit - distinguish media and service costs

Data quality / attribution limits and assumptions

Review rule - what evidence would support continuing, changing or stopping?

Agree the next actions

Choose a small set of deliverables, named owners and review dates. Confirm dependencies and the next decision rather than promising a search position or enquiry volume.

3. Assign and review

Action 1 / acceptance criteria

Owner

Due / review

Action 2 / acceptance criteria

Owner

Due / review

Action 3 / acceptance criteria

Owner

Due / review

Dependencies, risks and approvals needed

Next review: date, participants and decision to make

Fill and save this PDF locally. No information is sent to SEOptimizer until you choose to share it.