

mindbody

TEMPLATE

Creating a Marketing Plan and Budget for Your Business



Your ability to attract and retain clients relies heavily on your marketing strategy, which starts with a clear plan. Thoughtfully crafted marketing tactics will help you focus your time on the right things, spend your budget wisely, and, most importantly, bring more clients to your business.

Use the template below as your guide to crafting a marketing strategy that's unique to your business goals.

Background data

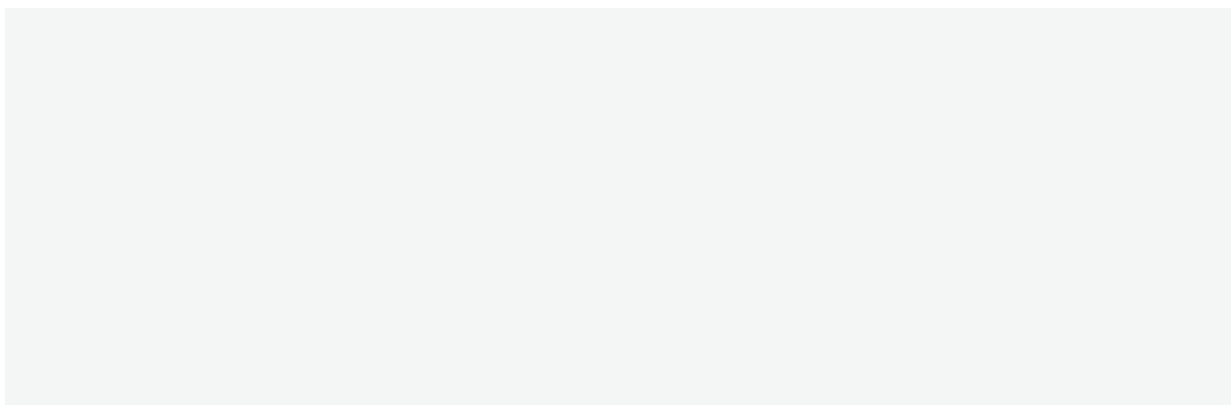
We'll start with some foundational data points about your business to help you choose the right marketing strategies. This information will help you target your ideal clients and stand out from your competitors.

Business goals & objectives

What's your primary business goal for the year? For example, "Obtain an average of 10 new members each month throughout the year."

Identify three marketing strategies that align with your business objective.

Choose the metrics you will use to determine whether your strategies were successful.

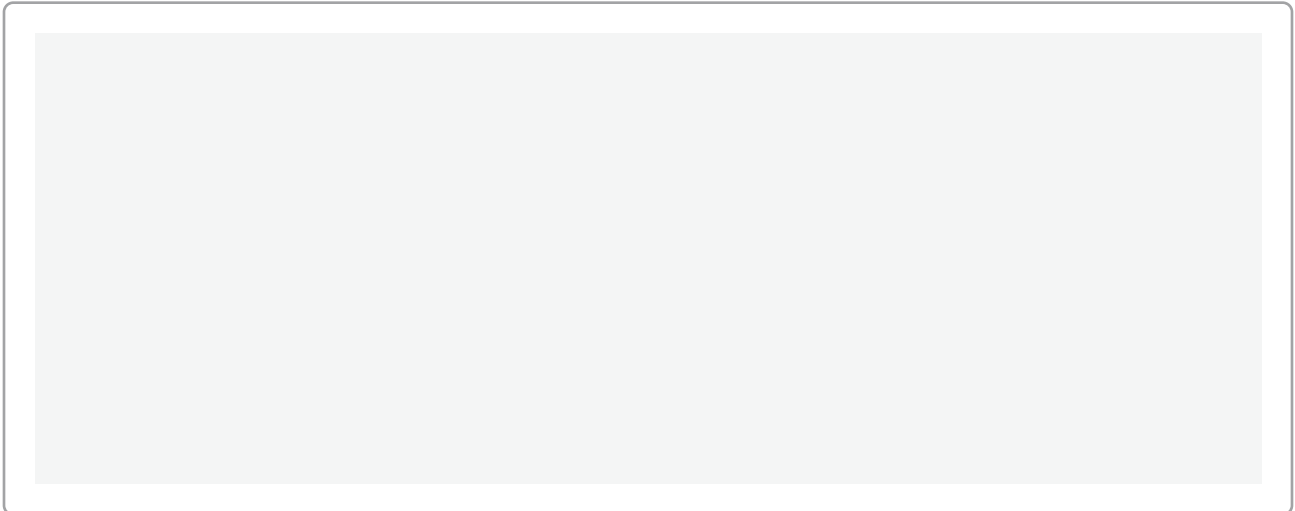


Business setup

What services do you provide?

What's your key brand message?

What do you want visitors to remember about you?

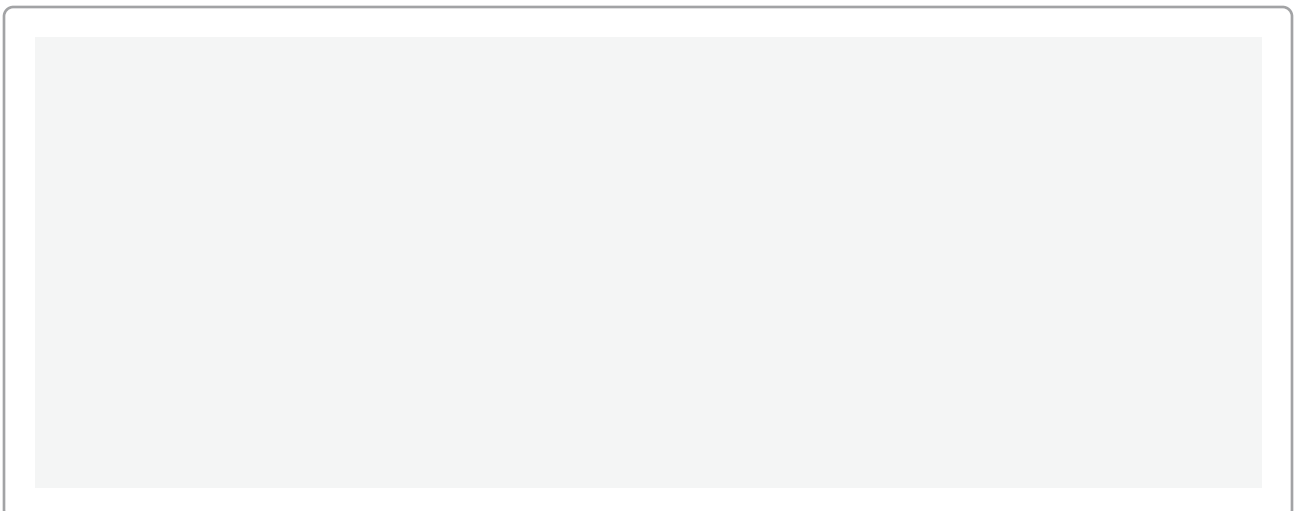


Target audience

Who is your target audience and what are their demographics?

Identify your prospects' buying behaviors and purchase decisions.

What solutions do you provide for your audience that other businesses don't?



Competitive analysis

Who are your primary competitors?

What do your competitors do well? What do they do poorly?

What differentiates you from your competitors?



Marketing strategy

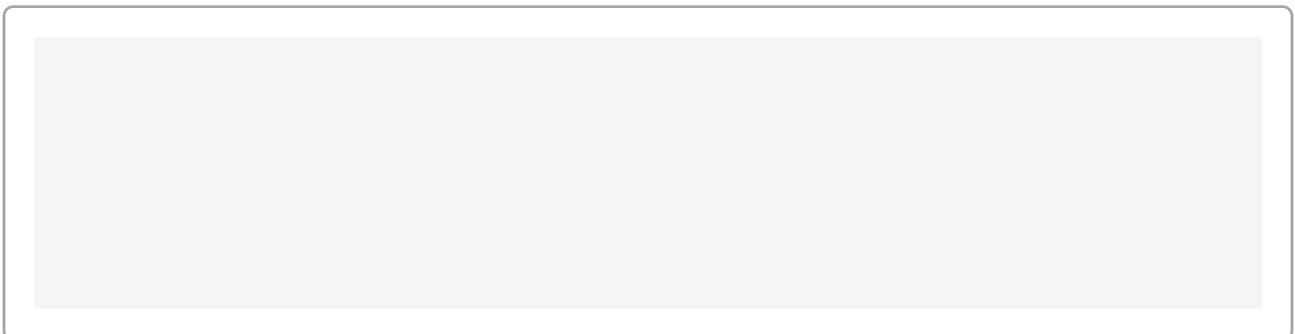
This section will help you identify where to focus your efforts to meet your marketing and business goals.

Channels

Where and how do your prospective clients prefer to receive information?

Which channels will be most effective for reaching your audience?

How can you make it easier for prospects to find you?

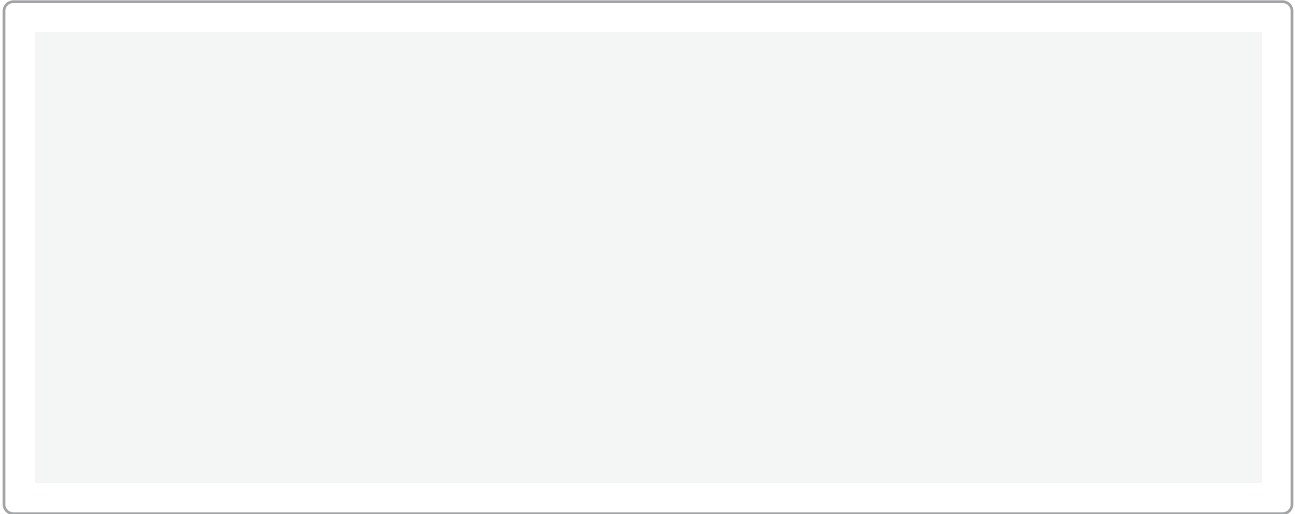


Messaging

What are the key messages that you'll share throughout your marketing communications?

How will you ensure consistent branding across all channels?

What content formats are most accessible to you?

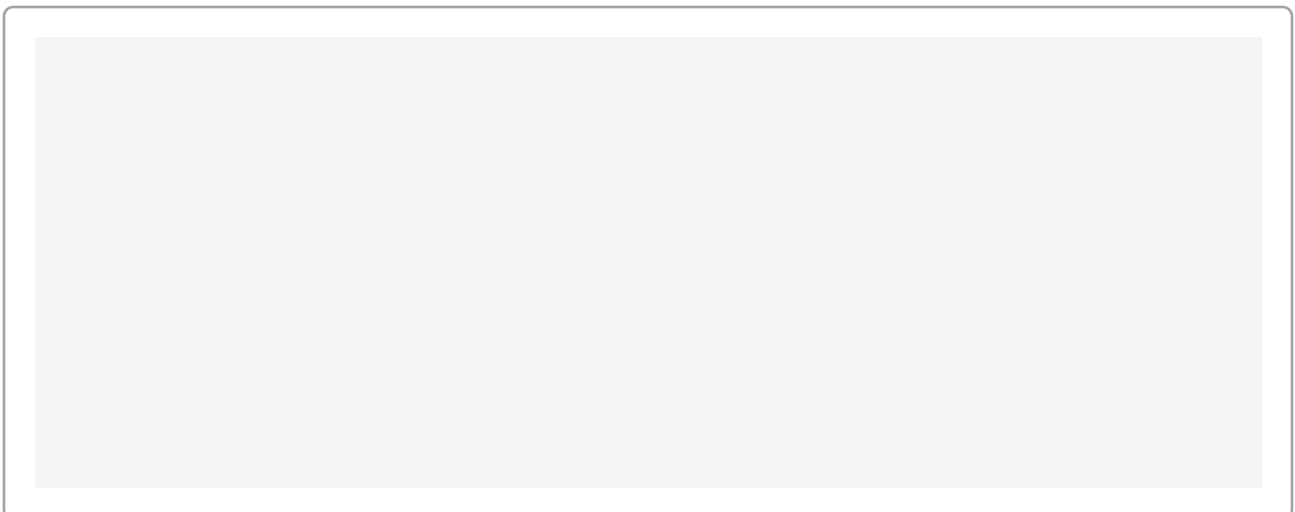


Ownership

Who will be responsible for each channel and/or tactic of your plan?

What are your key milestones?

How will you track progress to goal and project milestones?



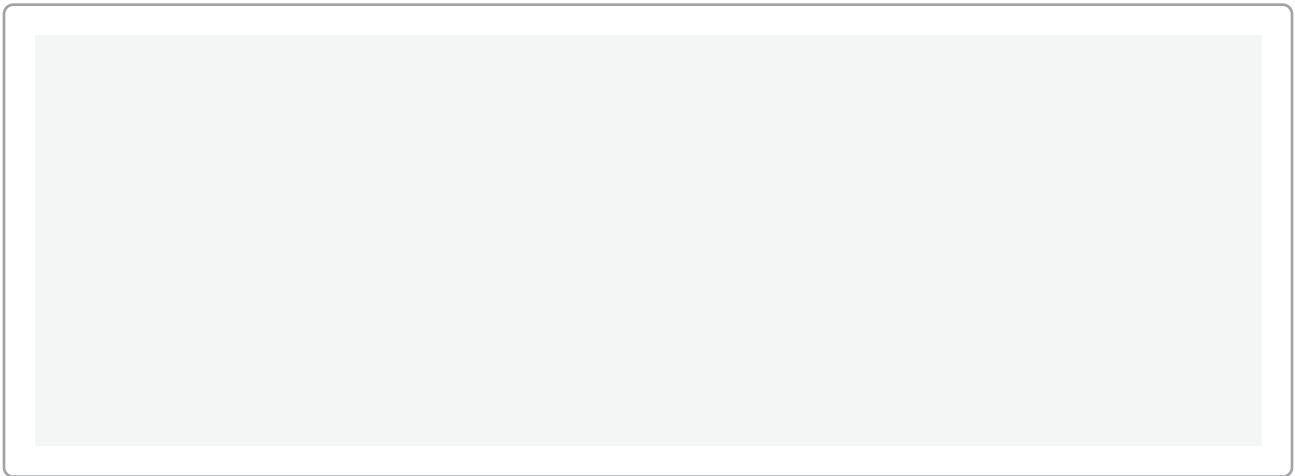
Conversion

How will you convert visitors into repeat clients? Memberships?

What is your introductory offer and how will you structure it?

How will you check in with clients during their introductory offer?

How will you get clients to return when you haven't seen them in a while?

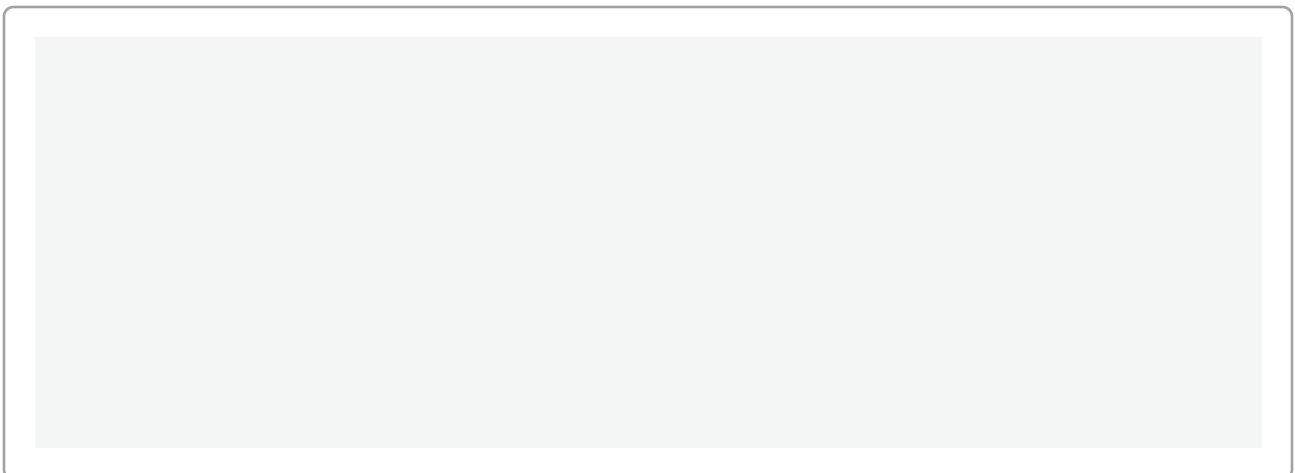


Loyalty and advocacy

How will you encourage happy customers to write reviews?

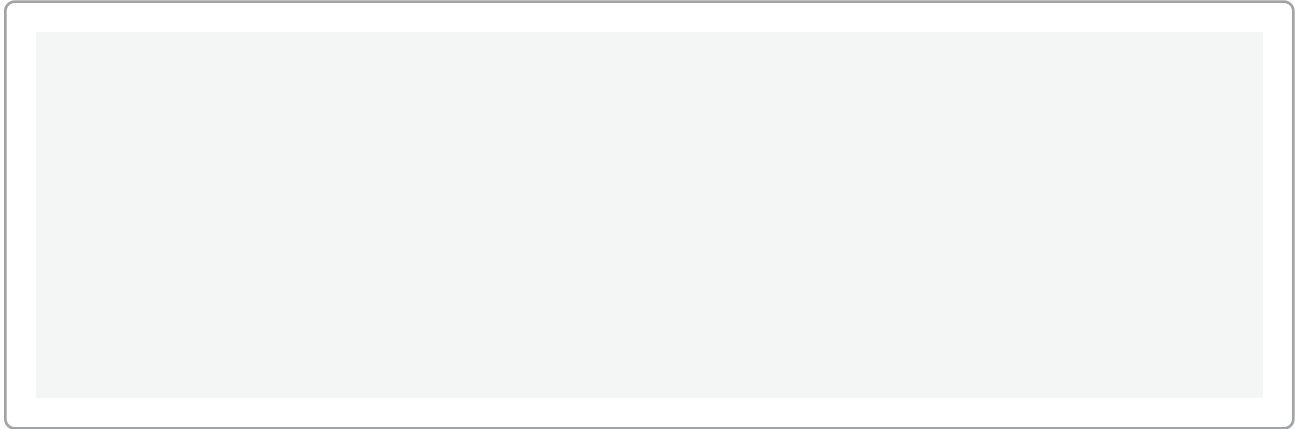
Do you have a referral program to reward loyal clients?

How will you stay connected with your current clients?



Tactics

Using the information above, write down three to five marketing tactics you plan to implement.



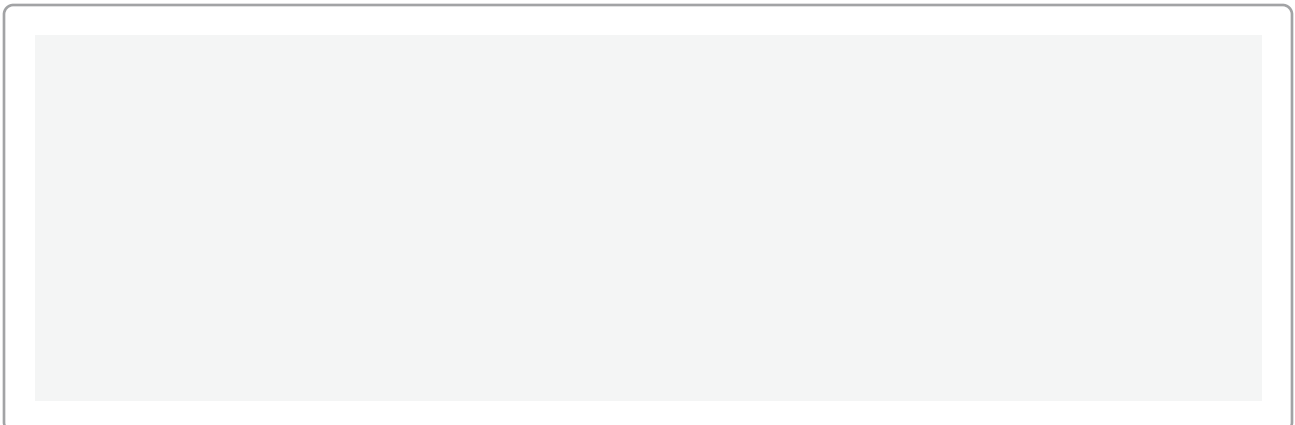
Measurement

This section will help you consider how to track metrics and analyze the success of your marketing plan.

Success tracking

What does "success" look like for your marketing strategy?

How will you measure the success of your marketing plan?

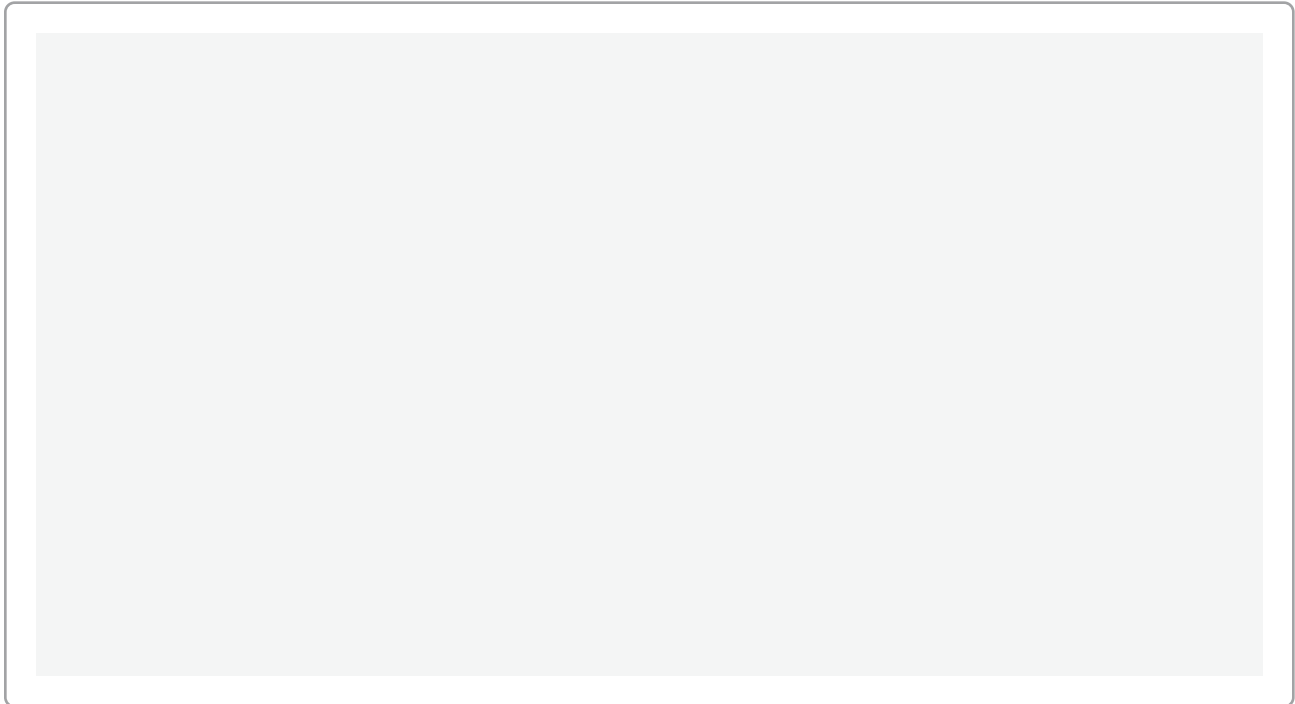


KPIs

What tools will you use to track your metrics?

What quantitative and qualitative metrics will you use for your KPIs?

Write down a KPI for each marketing tactic you plan to implement.



Budget

Now that you have your marketing plan and success metrics, it's time to identify your budget.

Financials

What is your total marketing budget for the year? Per month?

What percentage of your budget will be allocated to branding and awareness versus acquisition and conversion?

What are your estimated costs for each marketing channel and tactic you plan to implement?

Tracker

Use the spreadsheet below to create a clear budget for your marketing strategy or insert your own chart below.

Marketing Budget	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
Tactic #1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Tactic #2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Tactic #3	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Tactic #4	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total budget	00	00	00	00	00	00	00	00	00	00	00	00

Mindbody software was designed for fitness studios, salons, and spas to help you easily automate your marketing efforts and track success all in one, customizable dashboard.

See how Mindbody can help you streamline your efforts and grow your business.



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