



Workbook Templates

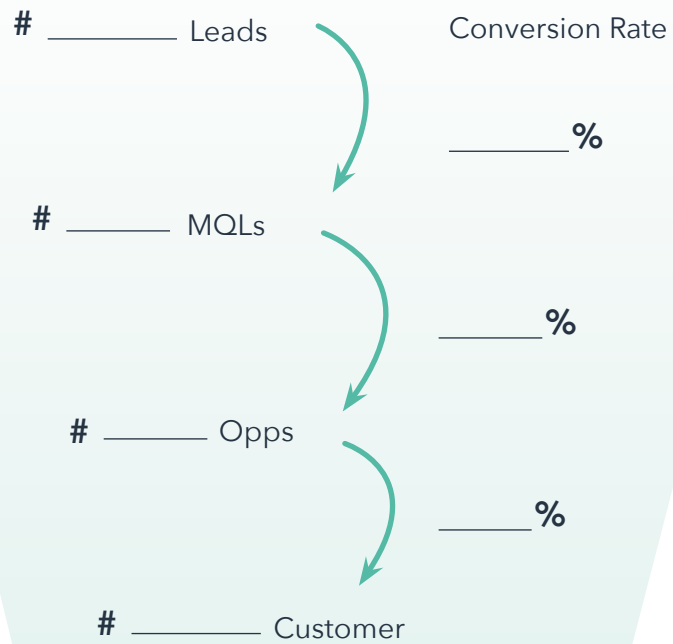
6 fill-in-the-blank templates to plan for the upcoming year

Audit Current Practices

		Q1	Q2	Q3	Q4
Website Traffic Volume					
Domain	# of views				
Best performing website page	Title				
	# of views				
Blog	Subjects covered				
	Frequency of posts				
	# of views				
Best performing blog post	Title				
	# of views				
	# of likes & comments				
Source Traffic Volume					
Organic Search	# of views				
Direct	# of views				
Paid Advertising	# of views				
Email	# of views				
Referrals	# of views				
Social Media	# of views				
Other	# of views				

Conversion Rate Funnel

Conversion Funnel



Fill in this "funnel" to map out the client's current conversion rates. A conversion rate is the percentage of people that take a desired action.

To calculate the percentage, divide the two stages you want to measure. For example, to calculate the conversion rate of Leads that convert into MQLs, divide the total number of MQLs by the total number of Leads.

Review Past Campaigns

	Campaign 1	Campaign 2	Campaign 3
Goal			
Persona			
Message			
Content			
Execution			
Results			
Cost			
Proven ROI			
Key Takeaway			
Model for future campaign			

Buyer Personas

Buyer Persona Name:	
The "Who"	
Background	
Demographics	
Identifiers	
The "What"	
Goals	
Challenges	
What can we do?	

The “Why”	
Real Quotes	
Common Objections	
The “How”	
Marketing Messaging	
Elevator Pitch	

Competitor Analysis

	Agency's Client:	Competitor 1	Competitor 2	Competitor 3
Targeting				
Key messages				
Shifts in strategy				
Campaigns				
Partnerships				
Changes to product/pricing				
Content				
Social Platforms				
SERP ranking				
Blog / Frequency				
Marketing Tools				

Growing for the Future

Business Goal Examples	Project Examples	Deliverables Examples	How to Measure this Project
Brand Awareness	Social Advertising, Direct Mail, Website Rebrand	- Finalize color scheme, font list, and feel your brand is going for - Advertise on social - Blog - Send out print advertising	Traffic, Impressions, Shares, Reach, Community (Followers), Visits, Downloads, Mentions, Media Coverage
Generate Leads	Content Campaign	- Decide on content type - Create conversation path (landing page) - Decide on distribution plan (paid, social, email, blog post)	Average # Generated on Daily, Weekly, Monthly Basis, Click Through Rate, Conversion Rate
Improve conversion rate of Leads to MQLs	Lead Nurturing	- Outline email nurture path(s) - Build X (number) of emails - Create workflow to trigger nurturing	Number of Follow-Up Touches/ Engagement, Percentage to Sales, Time to Sales, Close Rate
Improve SQL to Close Rate	3 webinars	- Write email follow-up templates for sales reps - Build reporting process to determine which email templates are performing best	Average Lead Close Rate, Customer Acquisition Cost, Time to Customer, Average Sale Value, Raw Monthly and Quarterly Numbers, Revenue Fluctuations
Improve Customer Retention Rate	Customer Acquisition	- Incentives for repeat business - Continually send educational content - Check in to ensure happiness with product/ service	Retention Rate, Lifetime Value, Customer Acquisition Cost, Percentage of Revenue from Current Customers, Churn Rate

Roadmap

Business Goal:		
Project:		
Deliverables:		
Budget:	Time Commitment:	Predicted Impact: