



**What marketing goals do you hope to accomplish?**

**1**

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**2**

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**3**

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**What needs to change internally to achieve these goals?**

**1**

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**2**

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**3**

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**How do you intend on implementing these changes?**

**1**

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**2**

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**3**

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**Why are these methods and mission important?**

In 1-2 sentences, describe why the above is important. Keeping it short and concise will allow you to explain your marketing efforts to key stakeholder who may not know/understand marketing and can be valuable for buy-in/support of your initiatives.

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## GOALS

*These should be your goals for the year - make sure each goal has a #, date, % or \$ attached to it... or it doesn't count. Your goals should be SMART (specific, measurable, attainable, relevant and attainable). Example: Increase sessions by 60% by start of Q3 (July - September).*

1

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2

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3

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4

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5

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6

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## METRICS

*Example: Unique visits will be used to measure page view success.*

1

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2

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3

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4

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5

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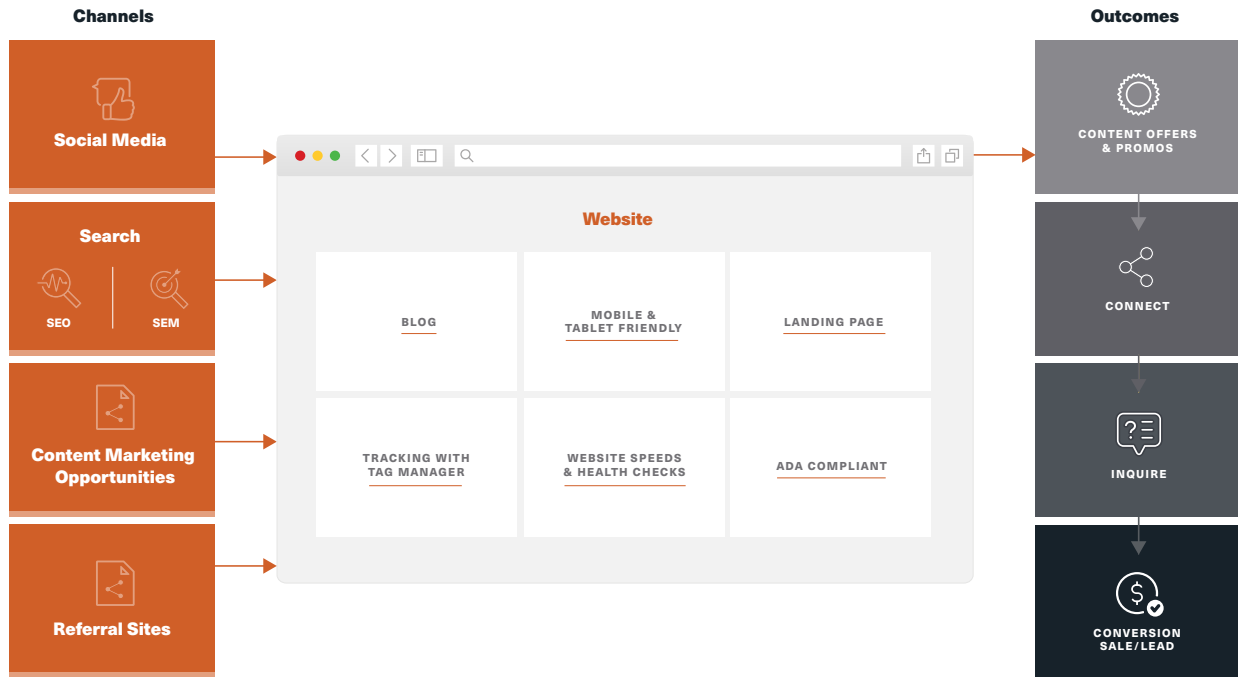
6

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**What platforms do you intend on using, and how do you plan on using them? Select all that apply.**

The below diagram shows what drives traffic to your site to help you visualize the tools you plan on using and what your expected output should be. This should help you define your platforms and the goals they should implement across the board.

**STRATEGY DIAGRAM**



**CHANNELS**

- Facebook
- Twitter
- Instagram
- LinkedIn
- YouTube
- Email Marketing
- Google My Business
- Pinterest
- Podcasts
- Organic/Search Engine
- Blog
- Marketing Automation

**ASSETS**

- Landing Page
- Website
- Microsite

**SEARCH**

- SEM
  - Google Ads
  - Microsoft Ads
  - Facebook/IG Ads
  - LinkedIn Ads
  - Video
  - Display
  - Retargeting
  - Other: \_\_\_\_\_
- SEO
  - Google
  - Bing
  - Yahoo
  - Yandex
  - Google Search Console
  - Google Analytics
  - Bing Web Masters
  - Google Tag Manager

**CONVERSION POINTS**

- Buy
- Upsell
- Retention
- Client Contact (e.g. Contact Us/Subscribe)
- Call/Reserve/Book Appointment
- Form Fill Leads
- Phone Call Leads
- Attend Webinar
- Event (e.g. Webinar, Class, Trade-show, Special Occasion, etc.)
- Social Follow
- Social Engagement (e.g. Like, Share, etc.)

**REQUIREMENTS**

- Mobile Friendly
- ADA Compliant
- CRO

# THE COURTING PROCESS

## ► Buyer Persona Profile

This section is dedicated to defining your target audience; understanding who they are, what they do, their goals and why they matter to your marketing initiatives.

**Who are they?**

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**What are their goals?**

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**What's important to them?**

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**What problems can we solve for them?**

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**What do we want from them?**

- Purchase
- Lead
- Contact Information
- Engagement

**Where do they connect?**

- Website/  
Landing Page
- Social Media
- Email/  
Communications
- Blogs

Other: \_\_\_\_\_

## ► Strategy & Differentiators

*Everyone offers what you offer; so how do you make yourself stand out? Understanding and showcasing your value will better help you define what your differentiators are. You'll want to think of who your internal resources will be to help you push that message.*

How are we remarkable?

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How do we show off our awesomeness?

Testimonials/  
Review

Case Studies/  
White Papers

PR/  
Communications

Thought  
Leadership

What types of content will we publish and who will be our resource?

CONTENT TYPE	TOPIC	RESOURCE
White Papers	Restaurant Management	Gordon Ramsay

List Key Words

BRAND	NON-BRAND

► **Goals & Benchmarks**

Make sure to define what your weekly, monthly, quarterly and annual benchmarks are. These are related directly to accomplishing your goals, but this is your plan. Make sure you add a date or reference a date to each.

**This Week**

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**This Month**

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**This Quarter**

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**This Year**

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