

Marketing Planning Worksheet

Developing marketing strategies and tactics

In order to create a solid marketing plan for your business, it helps to establish strategies and tactics for each of your key goals. (Hopefully you have already identified your key goals and have them recorded.) Goals and objectives should be **S.M.A.R.T.**: specific, measurable, achievable, relevant and timely. Each goal should support your overall business plan and be accompanied by a specific strategy and tactics for achievement.

Below is a worksheet to record your goals and the other key planning components.

GOALS	OBJECTIVE	STRATEGY	TACTIC	NOTES
Make them S.M.A.R.T. (For example: Increase my client-base by 20 in Q4.)	These provide a workable timeline to achieve the goal. (For example: Generate 10 new leads per week.)	A broad overview of how the goal will be achieved – big picture, not detailed	Specific actions or behaviours required to achieve the strategy and underlying goals.	

Marketing Planning Worksheet (continued)

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