



# **Duct Tape Marketing System**

## **Forms Workbook**

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# Vision

*"If we were meeting here three years from today, looking back over those three years, what has to have happened, both personally and professionally, for you to feel happy with your progress?"*

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Where are you now?	Success Factors What has to happen for you to succeed?
Where do you want to go?	
What will it take to get there?	
Best Result	What if you do?
Worst Result	What if you don't?







# Ideal Client Description

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Segment Name	Goals Related to Purchase
Purchase Motivation	Behavior that Qualifies
Greatest Frustration	Biographical Sketch



# Client Survey

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Interviewee Name: \_\_\_\_\_

<b>Why did you choose us in the first place?</b>	<b>Do you refer us? If yes, why? If no, why?</b>
<b>Why do you stay with us?</b>	<b>What could we / our products / services do for you that we don't?</b>
<b>What do we do that others don't?</b>	<b>What phrase(s) would you use to search for our product / service / solution?</b>



# Talking Logo

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Description of Process	
<p>Your talking logo is created in two distinct parts.</p> <p>Part 1 addresses your target market.</p> <p>Part 2 zeroes in on a problem, frustration or want that your market has.</p> <p>You know you have a great talking logo when a person hears you deliver it and immediately says, "Really, how do you do that?"</p>	
Pattern	What do you do for a living?
<p>Action verb, (I show, I teach, I help) target market, (business owners, homeowners, teachers, divorced women, Fortune 500 companies) how to xxxx = solve a problem, get a result or meet a need.</p>	
How do you do that?	
<p>In order to make your Talking Logo truly powerful you'll need to have a complementary statement that tells them just how you deliver on your promise when the listener inevitably asks to know more.</p>	





# Strategy

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Difference	Success Factors How Will You Know Your Strategy Works?
Ideal Client	
Purpose Statement	
Talking Logo	
Core Message	
Best Perception	
Worst Perception	



## Identity Element Audit

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Name (does the firm name support the brand?)	Action Plan: What Needs to be Done?
<b>Logo</b>	
<b>Colors</b>	
<b>Images</b>	
<b>Print Materials</b>	

# Identity Element Audit (continued)

---

<b>Online</b>	<b>Action Plan: What Needs to be Done?</b>
<b>Advertising</b>	
<b>Office</b>	
<b>Other</b>	
<b>Best Perception</b>	
<b>Worst Perception</b>	



# Creative Brief

---

Design Firm: \_\_\_\_\_ Project Name: \_\_\_\_\_

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

## Overview

## Ideal Client Description

## Core Message

## How Will this Project be Used?

## Existing Brand Elements

## Deadline

## Budget



# Hourglass

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Know</b>	<b>Buy</b>
<b>Like</b>	<b>Repeat</b>
<b>Trust</b>	<b>Refer</b>
<b>Try</b>	<b>Describe the Ideal Customer Experience</b>



## Case Statement Outline

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Purpose:** To convince your ideal client to exchange their money for something of value that you offer. It forces you to get to the real reason why people should spend money on your product/service.

**A statement of a challenge, frustration or problem that your target market experiences.**

**Create an image of what life would be like if the problem was solved.**

**Describe how they got here in the first place (if relevant).**

**Make a directed call to action.**



## Difference Summary

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Your unique approach

--

### Your processes (create a story of the experience they will have)

--

### The little things you do

--

### Your understanding of what they crave in your industry (review your ideal client interviews and competitor surveys)

--



## Ideal Client / Customer Description

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Purpose:** To paint a picture (for others) of whom your ideal market is and why they are inclined to hire your company. Referral sources and strategic partners particularly appreciate knowing they are confidently sending their leads to the right place.

Address the following:

**Review your Ideal Client exercises. Summarize them briefly in a format others can appreciate and identify with.**

**Why do they hire you? What trigger, circumstance or predicament are they in that makes them reach out to you?**



# Ideal Client / Customer Description (continued)

---

**Describe factors that seem to exist in your most ideal client relationships.**

**Outline the results they enjoy when they engage your service.**

Remember, that you're painting a picture of your ideal clients for others, not yourself (you already know). Don't start with "female ... age 25-35 ... double income, etc. It should be an image that people can bond with, either for themselves or someone they are willing to refer.



## Success Story Outline

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Name/Company being featured: \_\_\_\_\_

### Situation

### Solution

### Result

### Testimonial Statement

### Format Options (Print, Online, Audio, Video)



# Your Marketing Story

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Purpose:** To convey your passion and reason for being in business in an open and honest way that allows your ideal client to connect to you. Win their hearts as well as their heads.

Consider the following:

**Why are you in this business?**

**Was there a pinnacle or "Aha!" moment that the idea for your business was created?**

**How did you get started? What were your first mistakes? Successes?**

**What lessons did you learn? How did you get better?**

# Your Marketing Story (continued)

---

**Why does your business choose to do things the way it does?**

**How did you come up with your business name? Slogan?**

**How did you get better than your competition?**

**What is the future of your business?**

Stories build trust. And trust is an amazing sales tool. Tell your Marketing Story in an open, honest and entertaining way. This is one key advantage that small businesses have over larger businesses, and you should use it to the last drop.

Your story can have a theme, for example, how 'you came up with your slogan' or 'how a particular client changed the course of your business.' It's a story, and it's your story so you have the best idea of what's relevant to your audience.

Write first, then refine after 24 hours. Test your story out with some existing ideal clients or someone who knows you and your business well. Finally, have your trusty editor, copywriter or other emotionally-unattached source do the final edit.



## Your Product / Service Offerings

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Purpose:** To outline the various services, products and packages that you have available and clearly describe the benefits of each.

**Outline each of your products and/or packages**

**Bullet-point the specifications of each**

**Detail the benefits of selecting each one (remember, 'benefits' are more saleable than 'features')**

**Direct a call to action or pathway to purchase**

Remember, that the definition of marketing is “to get someone with a need to know, like and trust you.” That is the purpose of the other components of your marketing kit (like your Marketing Story). When in business, it's tempting to start with this section first, but as we know, it comes off as “pitching and selling” rather than being thoughtful about a need or problem your ideal client is facing. After they “know, like and trust” you, they'll be much more receptive to what you have to offer.



## Your Processes and Checklists

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Purpose:** To show your prospect what you do internally to keep your promise and further differentiate your uniqueness in your industry.

If you already have documented processes that you use, simply include them in your marketing kit as checklists or flowcharts. It is yet another means of articulating your difference and expertise in your industry.

If you don't have documented processes, think about it. Chances are you are doing things a certain way that makes you successful. It shouldn't be much effort to create an experience road map through your business.

Consider the following:

**At what point should a prospect trigger a need for your services?**

**How do they reach you?**

**What happens at the first point of contact?**

# Your Processes and Checklists (continued)

---

**What are their options thereafter?**

**What are the stages of their experience?**

**What happens behind the scenes that they don't see?**

**What is the next step?**

How much is enough? Our objective is not to give away trade secrets, but to shed light on the experience of doing business with you. It's possible that you present a simplified or 'creative' version of your processes for the purpose of marketing.



# Video Storyboard

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Audio-Visual Script | Proposed Title: \_\_\_\_\_ Page# \_\_\_\_\_

	Shot Number:	
	Description	
Audio – Narration, Sound Effects, Music, etc.		
	Shot Number:	
	Description	
Audio – Narration, Sound Effects, Music, etc.		
	Shot Number:	
	Description	
Audio – Narration, Sound Effects, Music, etc.		





# Content Grid

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Every business needs to consider five types of content for their total marketing system: Content that creates awareness, content that builds trust, content that teaches, user generated and filtered content, and content that helps create a sale.

Use this form to help detail your content plan for each category

Type	Example	Your Content Plan
<b>Awareness</b>	Videos, articles, lists, infographics, blog posts, newsletter, social media posts	
<b>Trust</b>	Seminars, how to articles, video archives, whitepapers, press releases, social media engagement	
<b>Education</b>	Seminars, how to guides, video demos, tutorials, user handbooks	
<b>User/OPC</b>	Testimonials, case studies, industry reports	
<b>Conversion</b>	ROI calculators, case studies, comparison guides, peer led presentations	



# Editorial Calendar

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Campaign</b>	<b>Webinar</b>
<b>Newsletter</b>	<b>Seminar</b>
<b>Blog</b>	<b>Articles</b>
<b>eBook</b>	<b>Video</b>



# Web Site Brief

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Platform</b>	<b>Contact Page</b>
<b>Content</b>	<b>Social Integration</b>
<b>Navigation</b>	<b>Analytics</b>
<b>Lead Capture Form</b>	<b>Hosting</b>



# Wordpress Blog

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Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Theme	Plugins
Page Templates	Widgets
Mobile Theme	Social Integration



# Listening Station

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

## Brand Alerts

--

## Product / Service Alerts

--

## Competitive Alerts

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## Client Alerts

--

## Industry Alerts

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## Optimized Online Brand Assets

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Images: Flickr/Picasso (Name, Description, Keywords)	Presentations: Slideshare (Name, Description, Keywords)
Audio: Libsyn (Name, Description, Keywords)	Video: YouTube Channel (Name, Description, Keywords)



## Social Profiles

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

### LinkedIn Profile (Description, Links, Profile Picture)

### Facebook Page (Fan Only Content, Profile Image, Like/Send Button)

### Twitter Profile (Name, Bio, Link, Avatar)



# Online Conversion

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Landing Page Campaign	Call to Action
Headline	Follow-up
Video	A/B Test Tool





# Keyword Research

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Key Phrase (Volume / Competitiveness)	Long Tail Phrases (Volume / Competitiveness)



# Competitive Research

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

## Competitor #1: Ranking Factors

Competitor Name: \_\_\_\_\_

## Competitor #2: Ranking Factors

Competitor Name: \_\_\_\_\_

## Competitor #3: Ranking Factors

Competitor Name: \_\_\_\_\_



# Inbound Links

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

## Anchor Text Options

--

## Target Links

--

## Directory Links

--



# Local Content

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

## Address on Pages

## Google Map

## Geo Meta Data

## Contact

## Local Internal Links

## Community Content

## Suburb Mentions



## Local Search Directory Checklist

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Local Directory Name (e.g. Google Places) \_\_\_\_\_

Description	Category(s)
Keywords	Reviews
Images	Video



# Rating and Review Site Checklist

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Review Site Name (e.g. Yelp) \_\_\_\_\_

<b>Claim Profile</b>
<b>Description</b>
<b>Images</b>
<b>Video</b>
<b>Special Offers</b>
<b>Coupons</b>
<b>Review Plan</b>



# Advertising

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Target Segment	Brand Elements
Medium - Circulation	Offer
Headline	Call to Action
Core Message	Campaign Cost / Run Date



# Referral

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Referral Target Description	Referral Offers
Education Process	Referral Tools (gift certificates, letters, etc.)
Trigger Phrases	Follow-up





## Sample Perfect Intro Packet

---

### Overview

The Perfect Introduction is a tool that we use as a way to properly educate referral sources. It gives the referral source a clear picture of the ideal target client, a way to communicate what you do and the comfort of knowing how you work with prospects. This is something that we have most of our clients complete (especially professional service providers) and use in their own business as part of their referral lead generation process.

The Perfect Introduction in Reverse uses this tool as a way to generate referral network partners. It is a very low-key way to find good referral sources and to introduce your business in a creative manner.

### Steps in the system

- 1) Create a list of 20-30 potential referral sources (worksheet on the next page). These potential referral sources may be other businesses that work with your target client and that you either know for a fact or feel operate in a way that would make you confident in referring them to your clients and network. (Think loan officers, insurance, financial planners, accountants, lawyers, print shops, graphic designers, web designers, software companies, computer consultants, leadership and HR trainers, sales trainers) – Ask your existing clients for leads too.
- 2) Send the Sample Perfect Intro letter, Blank Perfect Intro Form and your completed Perfect Intro to each of the potential sources.
- 3) Keep track of the phone calls, returned forms and file for later use.
- 4) Follow-up with responsive prospects to learn more about their business and then send them promotional materials along with your thoughts for how you could provide valuable content and opportunities to share with their client base.



## Potential Referral Sources

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Potential Referral Source Names	Send Perfect Intro Packet (3 pieces) **	Tracking: Returned forms / phone calls	Follow-Up with each Potential Source

**\*\*The three pieces that will be sent to each potential referral source are: 1) Sample Perfect Intro Letter 2) Blank Perfect Intro Form 3) Your completed Perfect Intro Form**



## Blank Perfect Intro (How to Refer)

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*Please complete this brief form so that I am better prepared to introduce your organization to my clients and prospects when the need arises. I appreciate you taking the time to share this information with me.*

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

**How Would I Spot Your Ideal Client? (describe your ideal client and be as specific as possible)**

**How Would I Best Communicate What You Do? (describe how you like your product/service to be explained; how are you unique?)**

**Your Client Referral Process (tell me a little about how to introduce you and your company to prospects I might refer)**

**What Others Are Saying (any client testimonials you care to share with me?)**

# Sample Perfect Intro Recruitment Letter

---

## What Is The Best Way To Recommend Your Business To My Clients?

Dear XXX,

It is very likely that I have clients and contacts that could benefit from knowing about what your business has to offer.

I have found that in addition to offering simple, effective and affordable marketing solutions, one of the most valuable things I can offer my network is the confident recommendation of other resources. And that is why I am sending you this letter today.

I believe, from what I have witnessed so far, that your firm, and the services you offer, aligns with the kind of business my clients should get to know better.

I have enclosed a very simple device, one that I have used often in my own business and with my clients, to make the process of understanding your business an easy one. With this document, completed by you, I will be more prepared to accurately present your business to anyone in need.

Please take a moment to complete the blank form I have enclosed, adding anything else you think I should know, and return it to me at the address below. I have enclosed a sample document that I use with my referral sources to act as a bit of a guide for you.

If you have any questions or would like to discuss mutual opportunities, please don't hesitate to contact me directly.

Thanks for help with this.

Regards,

John Jantsch



# Strategic Partner

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Partner Name: \_\_\_\_\_

## Perfect Intro Recruit

## Content Opportunity

## Special Offer

## Video/Audio Interview

## Co-branding Content

## Workshop

## Referral Made



# Public Relations Checklist

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Core Publication List (Business Journal, Daily)	Story Starters
Minor Publication List (Association, Alumni)	Guest Blog Opportunities
Major Story Pitches	Article Contribution Opportunities



# Media Target List

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Media Target #1		Media Target #2	
Journalist/Blogger Name:		Journalist/Blogger Name:	
Publication Name:		Publication Name:	
Audience:		Audience:	
Blog URL:		Blog URL:	
Facebook:		Facebook:	
LinkedIn:		LinkedIn:	
Twitter:		Twitter:	
Other:		Other:	
Media Target #3		Media Target #4	
Journalist/Blogger Name:		Journalist/Blogger Name:	
Publication Name:		Publication Name:	
Audience:		Audience:	
Blog URL:		Blog URL:	
Facebook:		Facebook:	
LinkedIn:		LinkedIn:	
Twitter:		Twitter:	
Other:		Other:	
Media Target #5		Media Target #6	
Journalist/Blogger Name:		Journalist/Blogger Name:	
Publication Name:		Publication Name:	
Audience:		Audience:	
Blog URL:		Blog URL:	
Facebook:		Facebook:	
LinkedIn:		LinkedIn:	
Twitter:		Twitter:	
Other:		Other:	



# Lead Conversion System

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Discovery Process	Transaction Process
Nurturing Process	Follow-up Touchpoints
Internal Seminar Outline	Results Review Process





Marketing Calendar

	January				February				March					
	3	10	17	24	31	7	14	21	28	7	14	21	28	
Weekly Theme	Week of				Week of				Week of					
Monthly Theme														
Events and Holidays														
Advertising														
Public Relations														
Referrals														
Social Media														
SEO														
Content														
Events														
Monthly Theme														
Tracking														



	April				May				June				
	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	
Monthly Theme	4	11	18	25	2	9	16	23	30	6	13	20	27
Events and Holidays													
Advertising													
Public Relations													
Referrals													
Social Media													
SEO													
Content													
Events													
Monthly Theme													
Tracking													



	July				August				September				
	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	
Monthly Theme	4	11	18	25	1	8	15	22	29	5	12	19	26
Events and Holidays													
Advertising													
Public Relations													
Referrals													
Social Media													
SEO													
Content													
Events													
Monthly Theme													
Tracking													



	October				November				December				
	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	Week of	
Monthly Theme	3	10	17	24	31	7	14	21	28	5	12	19	26
Events and Holidays													
Advertising													
Public Relations													
Referrals													
Social Media													
SEO													
Content													
Events													
Monthly Theme													
Tracking													



Marketing Budget

Monday Start Date	Sales Support		Public Relations		Online Adv		Offline Adv		Referrals		Direct Mail		Printing	
	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual
Jan														
Jan														
Jan														
Jan														
<b>Jan Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Jan														
Feb														
Feb														
Feb														
<b>Feb Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Feb														
Mar														
Mar														
Mar														
Mar														
Mar														
<b>Mar Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Total 1Q</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Apr														
Apr														
Apr														
Apr														
<b>Apr Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
May														
May														
May														
May														
<b>May Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
May														
Jun														
Jun														
Jun														
Jun														
Jun														
<b>Jun Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Total 2Q</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>



Monday Start Date	Consulting		Design		Copywriting		Support		Services		Totals by Month, Quarter & Year-to-Date			
	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Dif	
Week of														
Jan 3												0	#DIV/0!	
Jan 10												0	#DIV/0!	
Jan 17												0	#DIV/0!	
Jan 24												0	#DIV/0!	
<b>Jan Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
Jan 31												0	#DIV/0!	
Feb 7												0	#DIV/0!	
Feb 14												0	#DIV/0!	
Feb 21												0	#DIV/0!	
<b>Feb Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
Feb 28												0	#DIV/0!	
Mar 7												0	#DIV/0!	
Mar 14												0	#DIV/0!	
Mar 21												0	#DIV/0!	
Mar 28												0	#DIV/0!	
<b>Mar Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
<b>Total 1Q</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
Apr 4												0	#DIV/0!	
Apr 11												0	#DIV/0!	
Apr 18												0	#DIV/0!	
Apr 25												0	#DIV/0!	
<b>Apr Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
May 2												0	#DIV/0!	
May 9												0	#DIV/0!	
May 16												0	#DIV/0!	
May 23												0	#DIV/0!	
<b>May Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
May 30												0	#DIV/0!	
Jun 6												0	#DIV/0!	
Jun 13												0	#DIV/0!	
Jun 20												0	#DIV/0!	
Jun 27												0	#DIV/0!	
<b>Jun Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	
<b>Total 2Q</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!	



Marketing Budget

Monday Start Date	Sales Support		Public Relations		Online Adv		Offline Adv		Referrals		Direct Mail		Printing	
	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual
Week of														
Jul 4														
Jul 11														
Jul 18														
Jul 25														
<b>July Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Aug 1														
Aug 8														
Aug 15														
Aug 22														
<b>Aug Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Aug 29														
Sep 5														
Sep 12														
Sep 19														
Sep 26														
<b>Sept Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total 3Q</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Oct 3														
Oct 10														
Oct 17														
Oct 24														
<b>Oct Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Oct 31														
Nov 7														
Nov 14														
Nov 21														
<b>Nov Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Nov 28														
Dec 5														
Dec 12														
Dec 19														
Dec 26														
<b>Dec Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total 4Q</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total 2011</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0



Monday Start Date	Consulting		Design		Copywriting		Support		Services		Totals by Month, Quarter & Year-to-Date			
	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Proj	Actual	Dif	
Week of														
Jul 4												0	#DIV/0!	
Jul 11												0	#DIV/0!	
Jul 18												0	#DIV/0!	
Jul 25												0	#DIV/0!	
July Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Aug 1												0	#DIV/0!	
Aug 8												0	#DIV/0!	
Aug 15												0	#DIV/0!	
Aug 22												0	#DIV/0!	
Aug Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Aug 29												0	#DIV/0!	
Sep 5												0	#DIV/0!	
Sep 12												0	#DIV/0!	
Sep 19												0	#DIV/0!	
Sep 26												0	#DIV/0!	
Sept Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Total 3Q	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Oct 3												0	#DIV/0!	
Oct 10												0	#DIV/0!	
Oct 17												0	#DIV/0!	
Oct 24												0	#DIV/0!	
Oct Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Oct 31												0	#DIV/0!	
Nov 7												0	#DIV/0!	
Nov 14												0	#DIV/0!	
Nov 21												0	#DIV/0!	
Nov Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Nov 28												0	#DIV/0!	
Dec 5												0	#DIV/0!	
Dec 12												0	#DIV/0!	
Dec 19												0	#DIV/0!	
Dec 26												0	#DIV/0!	
Dec Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Total 4Q	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!
Total 2011	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	#DIV/0!

Projected 2011 Spending  
 Actual Spending To Date  
 Projected Vs. Actual Spent  
 \$0  
 \$0  
 \$0





Marketing Tracking



	January					February					March				
	Week of					Week of					Week of				
	3	10	17	24	31	7	14	21	28	7	14	21	28		
Leads Generated															
Leads Converted															
% of Leads Converted															
Avg. Trans. Per Customer															
Avg. \$ Per Customer															
Cost Per Lead															
Cost Per Customer															
Referrals Generated															
Referrals Converted															
Media Mentions															
Results Reviews															
Customer Complaints															
Customer Compliments															
Testimonials															
Blog Posts															
Tweets															
Facebook Updates															
LinkedIn Updates															



	April				May				June				
	4	11	18	25	2	9	16	23	30	6	13	20	27
	Week of				Week of				Week of				
Leads Generated													
Leads Converted													
% of Leads Converted													
Avg. Trans. Per Customer													
Avg. \$ Per Customer													
Cost Per Lead													
Cost Per Customer													
Referrals Generated													
Referrals Converted													
Media Mentions													
Results Reviews													
Customer Complaints													
Customer Compliments													
Testimonials													
Blog Posts													
Tweets													
Facebook Updates													
LinkedIn Updates													



	July				August				September				
	Week of				Week of				Week of				
	4	11	18	25	1	8	15	22	29	5	12	19	26
Leads Generated													
Leads Converted													
% of Leads Converted													
Avg. Trans. Per Customer													
Avg. \$ Per Customer													
Cost Per Lead													
Cost Per Customer													
Referrals Generated													
Referrals Converted													
Media Mentions													
Results Reviews													
Customer Complaints													
Customer Compliments													
Testimonials													
Blog Posts													
Tweets													
Facebook Updates													
LinkedIn Updates													



	October				November				December				
	3	10	17	24	31	7	14	21	28	5	12	19	26
Leads Generated													
Leads Converted													
% of Leads Converted													
Avg. Trans. Per Customer													
Avg. \$ Per Customer													
Cost Per Lead													
Cost Per Customer													
Referrals Generated													
Referrals Converted													
Media Mentions													
Results Reviews													
Customer Complaints													
Customer Compliments													
Testimonials													
Blog Posts													
Tweets													
Facebook Updates													
LinkedIn Updates													



# Marketing Action Plan Snapshot

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Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Use this form to capture the core elements of your marketing plan in one simple document. This is a tool you can refer to often and share with staff as you communicate and work to implement various marketing projects.

Many of the blocks of copy needed to complete this form will come from work you did on previous forms.

**Our core differentiation strategy is:**

**Here is how we spot our ideal client:**

**Here is how we communicate our core message:**

**Our core branding support elements are:**

# Marketing Action Plan Snapshot (continued)

**Our core educational content tools are:**

--

**Our primary hourglass elements are:**

--

**Our planned lead generation activities include:**

--

**Our key lead conversion elements include:**

--

**In three years from today this is what our business looks like:**

--



# Project

---

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

Purpose		Action Steps	
Priority			
Ideal Outcome			
Best Case			
Worst Case			



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