

Marketing Plan Template

10 Keys to a Marketing Plan That Works

Business name	
Prepared by	
Plan period (start - end)	
Date completed	

How to use this template

- Work through the sections in order. Each one matches a key from our blog post, "10 Keys to Creating a Great Marketing Plan."
- Type directly into the boxes, or print it and fill it out by hand.
- Don't aim for perfect. A simple plan you actually use beats a detailed one that sits in a drawer.
- Plan to review it monthly and revise it quarterly.

Key 1: Set Clear, Measurable Goals

Pick 3 to 5 goals. Make each one specific, measurable, and tied to a deadline. Example: "Book 15 new service calls per month by June 30."

Goal	How we'll measure it	Deadline	Owner

Key 2: Know Who You're Talking To

Describe the customers you most want more of. Be specific. Use a second profile if you serve two different types of customers.

Customer Profile A

Who they are (age, role, household or business type)	
Where they live or work	
The problem they need solved	
Their biggest worries or objections	
How they search for help (Google, Facebook, friends, AI tools)	
What makes them say yes	

Customer Profile B (optional)

Who they are	
Where they live or work	
The problem they need solved	
Their biggest worries or objections	
How they search for help	
What makes them say yes	

Key 3: Study Your Market and Competitors

List 3 to 4 businesses your customers might choose instead of you. Look at their websites, reviews, pricing, and ads.

Competitor	Services and pricing	Strengths	Weaknesses	Gap we can fill

Who shows up when I search my main service + my town?	
Who appears in the Google map results?	
What do customers praise or complain about in competitor reviews?	

Key 4: Define What Makes You the Obvious Choice

Your unique value proposition answers one question: why should a customer pick you over everyone else?

We help (who) ...	
... get (result) ...	
... by (how) ...	
... unlike (competitors) because ...	
Top 3 differentiators	
Proof we can show (reviews, years in business, guarantees, certifications, awards)	

Our tagline (one short sentence)	
---	--

Key 5: Set a Realistic Budget

Know your numbers before you spend. Include time and content costs, not only ad spend.

Total monthly marketing budget	
Average value of a new customer	
Most we can pay to win one customer	

Channel or expense	Monthly cost	Annual cost	Notes

Key 6: Choose the Right Channels

You don't need to be everywhere. Mark each channel High, Medium, or Low priority, then focus on the top two or three.

Channel	Priority	Goal for this channel	Monthly action	Owner
Website				
Local SEO and Google Business Profile				
Google Ads (PPC)				

Channel	Priority	Goal for this channel	Monthly action	Owner
Email marketing				
Social media				
Reviews and reputation				
AI search visibility				
Other:				

Key 7: Plan Your Content and Messaging

Content earns trust before anyone calls. Decide what you'll say, where, and how often.

Top 5 customer questions we should answer	
Main messages and offers	
Publishing rhythm (example: 1 blog per month, 3 social posts per week)	

12-Month Content Calendar

Month	Blog or web page topic	Social or video	Email or offer	Done?
January				
February				
March				
April				
May				
June				
July				

Month	Blog or web page topic	Social or video	Email or offer	Done?
August				
September				
October				
November				
December				

Key 8: Make Your Website the Hub

Every channel points back to your website. Check each item below.

- ☐ My phone number is easy to find on every page, and tap-to-call works on mobile
- ☐ Each main service has its own page
- ☐ Every page has a clear next step (call, quote form, booking)
- ☐ The site loads quickly and looks good on a phone
- ☐ Contact forms work and notifications reach the right person
- ☐ Customer reviews or testimonials are displayed
- ☐ My service area and address are clear and match my Google Business Profile
- ☐ The site has been updated within the last 12 months

Top 3 website fixes to make first	
--	--

Key 9: Track the Numbers That Matter

Record where each number comes from and what it is today, so you can see progress.

Metric	Where to find it	Starting number	Target	Check
Website visitors				
Phone calls				
Form submissions				

Metric	Where to find it	Starting number	Target	Check
Cost per lead				
Conversion rate				
New Google reviews				
Revenue from marketing				
Other:				

Key 10: Review, Adjust, and Repeat

A plan is a living document. Schedule your reviews now.

Monthly check-in (day and time)	
Quarterly review date	
What's working (do more of it)	
What's not working (fix or stop)	
What we'll change next	
Top 3 priorities for next quarter	

Your 90-Day Action Plan

Turn the plan into action. List the first steps and give each one an owner and a due date.

Phase	Action	Owner	Due
Days 1-30			

Phase	Action	Owner	Due
Days 31-60			
Days 61-90			

Want help putting your plan to work?

adPRO LLC has helped Southern Maryland businesses grow online since 1999. We're a Google Partner with master certifications in SEO, Digital Marketing, and Search Advertising. Call 443-532-6467 or visit adproincorporated.com to talk through your goals.