

Plan to Profit: *workbook*

*The companion to
Plan to Profit: The Essential Marketing Guide for Busy
Business Owners*

By Emma Rose Gallimore

Dear Reader,

Thank you for downloading the Plan to Profit Workbook! If you're a busy business owner who wants to market your business effectively, I've designed this workbook specifically for you.

Although anyone can use the workbook, it will be most effective in combination with "Plan to Profit: The Essential Marketing Guide for Busy Business Owners" available on Amazon Kindle. If you haven't already downloaded it, go do that first. As you read the book, you'll find activities that you can complete in the workbook.

You can print the workbook out or open it in Adobe and fill it out on your computer. I encourage you to complete the workbook as thoroughly as you can. If there's a question that seems too hard, that's probably the one you most need to answer if you want your marketing plan to be effective. It's possible that some questions won't be relevant to your business, and that's okay, but make sure you've at least given them some thought before you move on.

Throughout the workbook you'll also find action steps. These activities push you outside the workbook to take an action that will advance your marketing goals.

In the end, whether you stick to your plan and meet your goals is up to you. Let me know how it's going by emailing me directly at emmagauthor@gmail.com. I can't wait to hear about your success.

Happy Planning,

Emma Rose Gallimore

Setting **STAMR** Goals

A good goal has five characteristics. It's specific, time-oriented, achievable, measurable, and relevant.

My wish for my business is:

Take that wish and turn it into a useful goal by applying each of the five characteristics.

S - Specific

Put a number on your goal:

T - Time

Add a deadline:

A - Achievable

Is this goal achievable with current resources? Yes No

If not, what do I need to achieve it?

M - Measurable

I will use this to measure my goal:

R- Relevant

The benefit of achieving this goal is:

My Marketing Goal

State your marketing goal in a single sentence.

Ex. I will generate 10 new leads in the month of August.

I will use these resources to achieve my goal:

I will ask for help from these people:

Action Step!

Now find a sticky note and write down your goal. Put it on your computer monitor, mirror, or somewhere else where you can't help but see it.

My Ideal Customer

1. My ideal customer is between the ages of _____ and _____.

2. They make _____ per year.

2b. They are willing to spend:

\$1,000's

\$100's

pocket change

whatever is in their wallet

3. They work as _____ in the _____ industry

3b. They love
hate
are indifferent to their job

4. They are

married	divorced	polyamorous
single	dating	anti-relationship
committed	widowed	actively looking

5. They have children want aren't sure
do not have don't want

5b. Their children are between the ages of _____ and _____

5c. Their children are biological
adopted
foster
adult
only around sometimes

More about my Ideal Customer

6. For leisure time they have a lot some almost none

6b. They spend their leisure time

7. Their political affiliation is

7b. They are passionately dedicated selectively engaged
 sometimes interested annoyed by political talk

8. The social causes they care about are

8b. They donate to

8c. They volunteer at

9. They do do not participate in a spiritual practice or religion

9b. The religion or spiritual practice they follow is

10. The media they regularly engage with includes

TV shows like

Magazines like

Books like

Music like

10b. Their favorite radio stations are

11. Online they spend time at these sites

Facebook	LinkedIn	Instagram	WhatsApp
Pinterest	Twitter	Tumblr	Reddit
Snapchat	YouTube	Google+	TikTok

12. They usually shop at

Most Importantly My Ideal Customer

13. Hopes to accomplish

14. Is struggling with

15. Is often annoyed by

The name of my ideal customer is:

My ideal customer

In the box below, write a short paragraph describing your ideal customer based on the questions you answered above.

Finding my Brand Voice

Honest	Friendly	Retro	Cheerful
Helpful	Fun	Classy	Exuberant
Silly	Bright	Serious	Smart
Flirty	Bold	Conservative	Witty
Adventurous	Inspiring	Daring	Playful
Creative	Caring	Eccentric	Trustworthy
Casual	Contemporary	Snarky	Upbeat
Charming	Modern	Earthy	Hip
Sophisticated	Whimsical	Innovative	

Choose 6 of the adjectives above :

- | | |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Narrow your list down to 3 adjectives:

- 1.
- 2.
- 3.

My brand	does	does not use contractions
My brand	does	does not swear
My brand	uses	does not sparingly uses jargon
My brand	tells long, in-depth stories that capture hearts and minds	
	presents clear facts simply	
	does something in between	

Crafting My Elevator Pitch

My name is

I own/run/manage

I am a

I help people by

Using these tools

The result is

My Elevator Pitch

Action Step!

Now time yourself reading your pitch out loud. It should take you less than 60 seconds. If it takes more than a minute, make it shorter.

Checklist for Written Pitch Success

This checklist will help you make sure that every pitch you send is as effective as possible. Use it for every pitch you send out.

My offer is clear

I talked about benefits not features

My customer knows what's in it for them

Every word is essential to my message

My offer is specific to the customer's needs

I've given my customer reason to trust me

I spellchecked

I asked someone else to read it

If you still have questions about how to write the perfect pitch, take a look at the example on the next page. It checks all the boxes.

Sample Pitch

Dear Karen,

If you had asked me a week ago, I would have said that mustard was okay but I preferred mayonnaise. Then I tried Raye's mustard on a sandwich. The slightly sweet perfectly tangy flavor of Old World Gourmet transformed a simple BLT into a gourmet meal. My dinner guests thought I had some magical secret ingredient. Imagine their surprise when I told them, "it's mustard!"

As a Maine-based content writer, I have some big ideas on how Raye's mustard can get the word out about the museum revitalization project (and sell more mustard in the process). Think historical snapshots, snappy recipes, and a killer campaign letter.

A bit about me: I'm a Maine native with international experience helping both for-profit and non-profit organizations build relationships with ideal clients and donors. I've written compelling fundraising letters, engaging blog posts, and welcoming website content for organizations large and small. I'd love to create a custom content strategy for you.

All I need to get started is a quick phone call, and then you can sit back and wait for the new leads to roll in. Let me know when you have 15 minutes to spend on your content strategy.

In the meantime, I'll be at the store buying every flavor of Raye's they have in stock.

Good luck with your renovation,

Emma

Action Step!

Choose a person or business who could benefit from your offering and write them a personalized pitch.

Getting Help

Tasks I'd like to delegate:

I need a

full-time, in house employee

part-time, in-house employee

contractor or freelancer

5 Questions to ask your marketing professional

1. How long have you been doing this work?
2. Who have you worked with?
3. What kinds of projects have you done?
4. How familiar are you with my industry?
5. Can I see your portfolio or samples of your work?

People already on my team who can help me with this:

Where I Want to Market

Which of these outlets can you advertise in to reach your ideal audience?

Digital

Website

Social Media

Blogs

Paid Search Ads

Social Ads

Online Video

Email

My Top 3 Digital Outlets

1. **Website**

2.

3.

Print

Brochure

Newspaper

Letters

Flyers

Posters

Signage

My Top 3 Print Outlets

1.

2.

3.

Ideas for Experiential Events

After hours

Customer Appreciation

Customer Demo

Special Guest

Book Signing

Possible Experiential Outlets

1.

2.

3.

Ideas for In-person Events

Networking

Conferences

Door-to-door

Guest Speaker

In my Store

Where I can market in person

1.

2.

3.

The most important tactics for my business are

1.

2.

3.

My Marketing Strategy for

My goal is to

My offering is

The benefit it provides is

My customers are

My brand voice is

We do do not swear, use do not use jargon,
 use do not use contractions

My team members are

My monthly budget is

The tactics I use include: **website**,

Action Step!

Choose one action that will move you toward your goal and do it today!
Email me at emmagaauthor@gmail.com to tell me what you did.

Date I met my goal: