



Your First Marketing Plan Worksheet

Use this worksheet to build your first marketing plan step by step. Keep your answers simple and direct—you'll refine as you go.

Step 1. Define Your Goal

Main goal: _____

By when? _____

How will you measure success? _____

Example: Gain 50 email subscribers in 30 days.

Step 2. Identify Your Audience

Age range: _____

Location (if relevant): _____

Biggest struggles: _____

What motivates them? _____

Where do they spend time online? _____

Example: Women entrepreneurs, 30–45, struggling with tech overwhelm, active on Instagram and Facebook.

Step 3. Choose Your Core Message

My value in one sentence: _____

Why they should choose me: _____

Tagline or repeatable phrase: _____

Example: I help first-time creators launch digital products without tech overwhelm.

Step 4. Select Your Channels

■ Instagram ■ Facebook ■ Pinterest ■ TikTok

■ Email marketing ■ Blog / YouTube / Podcast

Other: _____

Step 5. Outline Your Tactics

Channel #1: _____

- Tactic(s): _____

Channel #2: _____

- Tactic(s): _____

Example: Instagram → 4 Reels per week + 3 Stories per day | Email → 1 newsletter every Friday

Step 6. Track & Adjust

Metrics I'll track: _____

Tools I'll use: _____

Check-in schedule: _____

Example: Track email signups weekly using ConvertKit dashboard.

■ Action Step: Fill this worksheet out, keep it visible, and use it as your 'north star' for the next 30 days. Adjust as you learn.