

PLANVORA

# Small Business Marketing Planner

40-page editable marketing system

PLAN • EXECUTE • MEASURE • GROW

# How to Use

A simple workflow

Start with the business snapshot → define your customer → build the offer → plan campaigns → execute weekly → measure → improve.

# Business Snapshot

Know where you are before you plan

**Business / Brand:**

**Primary offer:**

**Current monthly goal:**

### Top acquisition channel:

### Biggest marketing challenge:

## What is already working:

# Marketing Goals

Choose outcomes, not activity

90-day revenue goal:

Lead goal:

Customer goal:

Conversion goal:

Brand / audience goal:

One metric that matters most:

# Ideal Customer

Get specific about who you want to reach

- Who are they?
- What are they trying to achieve?
- What frustrates them?
- What triggers them to buy?
- Where do they spend attention?
- What would make them trust you?

## Customer Pain Points

## Turn problems into marketing angles

## Problem #1:

### Why it matters:

### Current workaround:

**Desired outcome:**

### Emotional impact:

**Marketing message to test:**

# Unique Value Proposition

Make the value obvious

We help [audience] achieve [outcome] without [pain] by [unique mechanism].

**Proof / credibility:**

**Key differentiator:**

**Short version:**

**One-line version:**

# Competitor Snapshot

Find gaps you can own

Competitor:

What they promise:

What they do well:

What customers may dislike:

Our opportunity:

Message we can own:

# Marketing SWOT

Turn insight into strategy

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

Top strategic move for the next 90 days:

# Brand Messaging

## Build a consistent message

## Core promise:

### 3 key benefits:

### 3 proof points:

**Words to use:**

**Words to avoid:**

### Brand personality:

### Primary CTA:

# Offer Planner

Build an offer people understand

Offer name:

Core outcome:

What's included:

Bonus:

Risk reversal:

Price:

Urgency / reason to act now:

## Offer Positioning

Give the offer a clear place in the market

### Best-fit customer:

### Main transformation:

### Alternative to buying:

### Why now:

## Why us:

**Positioning statement:**

# 90-Day Growth Plan

Choose the few moves that matter

Month 1 priority:

Month 2 priority:

Month 3 priority:

Lead target:

Sales target:

Key campaigns:

Weekly non-negotiable:

# Monthly Marketing Plan

Turn strategy into a monthly rhythm

Month:

Primary objective:

Campaign:

Offer:

Main channel:

Content focus:

Promotion dates:

KPI target:

# Weekly Marketing Planner

Know what happens this week

Week of:

Top 3 priorities:

Content to publish:

Promotion:

Outreach:

Follow-up:

Measurement:

Next action:

# Content Pillars

Create repeatable themes

**Pillar 1 — Educate:**

**Pillar 2 — Build trust:**

**Pillar 3 — Demonstrate:**

**Pillar 4 — Convert:**

**Pillar 5 — Community:**

**Best CTA for each:**

# Content Idea Generator

Never start from a blank page

Teach:

Answer a question:

Show a mistake:

Tell a story:

Share proof:

Compare options:

Handle an objection:

Invite action:

# Content Calendar

Plan before you publish

| DATE | CHANNEL | PILLAR | FORMAT | HOOK | CTA | STATUS |
|------|---------|--------|--------|------|-----|--------|
| 1.   |         |        |        |      |     |        |
| 2.   |         |        |        |      |     |        |
| 3.   |         |        |        |      |     |        |
| 4.   |         |        |        |      |     |        |
| 5.   |         |        |        |      |     |        |
| 6.   |         |        |        |      |     |        |

# Social Media Strategy

Give every post a job

Primary platform:

Audience behavior:

Posting cadence:

Content mix:

Engagement routine:

Conversion CTA:

Weekly success metric:

# Instagram / Facebook Planner

## Make social activity intentional

## This week's offer:

### 3 educational posts:

**2 trust posts:**

## 1 conversion post:

## Stories:

### Community engagement:

## DM follow-up:

# Email Marketing Planner

Turn attention into owned audience

Lead magnet:

Welcome sequence:

Weekly value email:

Offer email:

Re-engagement:

Main CTA:

List growth target:

# Lead Generation Planner

Create a reliable path to leads

Lead source:

Lead magnet:

Landing page:

CTA:

Traffic source:

Follow-up:

Target leads/week:

Conversion assumption:

# Lead Magnet Planner

Connect value to the right buyer

**Audience:**

**Problem:**

**Promise:**

**Format:**

**Title:**

**CTA:**

**Delivery:**

**Next offer:**

# Landing Page Planner

Plan the page before writing it

Headline:

Subheadline:

Problem:

Promise:

Benefits:

Proof:

What they get:

CTA:

FAQ / objection:

# Promotion Planner

## Make launches visible

### Offer:

**Audience:**

## Main message:

### Channels:

### Pre-launch:

## Launch:

## Last call:

### Follow-up:

# Campaign Planner

One campaign, one clear objective

Campaign name:

Objective:

Audience:

Offer:

Core message:

Channels:

Creative needed:

Start / end:

Success metric:

# Ad Campaign Brief

Give every creative a purpose

Objective:

Audience:

Pain point:

Hook:

Promise:

Proof:

CTA:

Creative format:

Test variable:

# Ad Creative Testing

Learn what actually works

TEST | HOOK | CREATIVE | CTA | SPEND | CLICKS | LEADS | RESULT

**A:**

**B:**

**C:**

**D:**

# Marketing Budget Planner

Spend with intention

Monthly budget:

Content:

Ads:

Tools:

Creators:

Email:

Other:

Expected leads:

Expected customers:

Target CAC:

# Customer Acquisition Tracker

See where customers come from

| SOURCE       | LEADS | CUSTOMERS | REVENUE | CAC | NOTES |
|--------------|-------|-----------|---------|-----|-------|
| Organic:     |       |           |         |     |       |
| Paid:        |       |           |         |     |       |
| Referral:    |       |           |         |     |       |
| Email:       |       |           |         |     |       |
| Partnership: |       |           |         |     |       |
| Other:       |       |           |         |     |       |

# Sales Funnel Map

See the journey end to end

AWARENESS → INTEREST → LEAD → NURTURE → OFFER → CUSTOMER → REPEAT

**Traffic source:**

**Lead capture:**

**Nurture:**

**Conversion event:**

**Retention move:**

# Customer Journey

Improve every touchpoint

Discover:

Consider:

Decide:

Buy:

Experience:

Return:

Refer:

Biggest friction to remove:

# Partnership & Referral Strategy

Grow through other audiences

Potential partner:

Shared audience:

Mutual value:

Offer:

Outreach angle:

Referral incentive:

Next 3 prospects:

# Marketing KPI Dashboard

Track the numbers that drive decisions

|                       |  |
|-----------------------|--|
| Traffic:              |  |
| Leads:                |  |
| Lead conversion rate: |  |
| Customers:            |  |
| Sales:                |  |
| Revenue:              |  |
| CAC:                  |  |
| ROAS / ROI:           |  |
| Email growth:         |  |
| Top channel:          |  |

# Weekly Metrics Review

Turn numbers into actions

What increased?

What decreased?

**Best channel:**

**Best content:**

**Best offer:**

**Biggest bottleneck:**

**One action for next week:**

# Monthly Marketing Review

Keep what works; change what doesn't

**Wins:**

**Misses:**

**Best campaign:**

**Worst campaign:**

**Customer feedback:**

**Key lesson:**

**Stop:**

**Start:**

**Continue:**

# Campaign Review

Document the learning

Campaign:

Goal vs actual:

Best creative:

Best audience:

Best channel:

What failed:

Why:

What to test next:

# AI Marketing Prompts

Use AI as a strategist, not a replacement

1. Generate 20 angles for [offer] targeting [audience].

2. Turn this customer pain into 10 hooks: [pain].

3. Create a 7-day campaign for [offer].

4. Analyze these metrics and suggest 3 tests: [data].

5. Rewrite this CTA for clarity and urgency: [CTA].

# 30-Day Marketing Action Plan

Turn the planner into momentum

Days 1–7: Strategy + offer

Days 8–14: Content + lead generation

Days 15–21: Promotion + outreach

Days 22–30: Measure + optimize

Daily priority:

Weekly KPI:

One bold action:

# Final Marketing Checklist

Ready to execute?

- Goal is measurable
- Customer is specific
- Offer is clear
- Message is consistent
- Content is planned
- Lead capture works
- Follow-up is ready
- Campaign has one objective
- Budget is defined
- KPIs are tracked
- Next test is chosen

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