

The Annual Marketing Plan Workbook

A month-by-month planning tool for Long Island businesses that want their marketing to follow a plan instead of whatever feels urgent that week.

How to use this workbook: start with the goals worksheet, then the customer profile. Both feed the calendar and budget pages that follow. Revisit the whole workbook once a quarter, not just once a year, plans that never get reopened stop matching reality fast.

What's inside

- Annual Goals Worksheet
- Ideal Customer Profile
- Channel Budget Allocation
- 12-Month Marketing Calendar
- Campaign Planning Worksheet
- Monthly KPI Tracking Sheet

1. Annual Goals Worksheet

Marketing goals should connect to a business outcome, not just "post more" or "get more followers." Start with the business number, then work backward to what marketing needs to produce.

This Year's Primary Business Goal

What Has to Be True for Marketing to Support That

Example: if the goal is 20% revenue growth and the average job is \$1,200, marketing needs to generate roughly X more qualified leads per month at your current close rate.

Three Marketing Goals for the Year

- 1.
- 2.
- 3.

How You'll Know It's Working

Leading indicator (tracked monthly):

Lagging indicator (tracked quarterly):

What You're Deliberately Not Doing This Year

Naming what's off the table protects the budget and attention for what's actually on the list.

2. Ideal Customer Profile

Every campaign in this workbook should be written for a specific person, not "everyone in Nassau and Suffolk." If you serve more than one type of customer, fill out a row for each.

Segment	Who They Are	What They Care About Most

Primary Customer Snapshot

Age range / life stage / business type:

Where they live or work (be specific to towns or regions):

What triggers them to start looking for you:

What almost stops them from buying:

Where they spend attention online (be specific, not just "social media"):

The One Sentence That Should Guide Every Campaign

"We help [customer] do [outcome] without [common frustration]." Write your version below.

3. Channel Budget Allocation

There's no universal right split, a landscaping company and a dental practice will look very different here. Weight the budget toward whichever channel is already proven to produce customers, and treat the rest as tests with a defined stop-loss.

Channel	Annual Budget	% of Total	Notes
Local SEO / Google Business Profile			
Website & Content			
Paid Search / Social Ads			
Email Marketing			
Social Media (organic)			
Reviews & Reputation			
Print / Local Sponsorships / Events			
Other			
Total			

A Reasonable Starting Rule of Thumb

- Established business, steady growth goal: 6-10% of gross revenue toward marketing.
- Aggressive growth goal, or new location/service launch: 10-15%.
- Tight year, protecting cash: focus spend on the one or two channels with the clearest, most direct return, and hold or cut the rest.

4. 12-Month Marketing Calendar

12-Month Marketing Calendar	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Theme / Focus												
Key Local Date or Event												
Primary Campaign												
Channel Emphasis												
Budget												

Long Island planning cues: spring cleanup and home-service ramp-up (Mar-May), summer/shore-town traffic (Jun-Aug), back-to-school and Small Business Saturday (Sep-Nov), holiday and year-end push (Nov-Dec), planning and slow-season retention (Jan-Feb).

5. Campaign Planning Worksheet

Photocopy this page (or rebuild it in a doc) for every campaign you run this year. A campaign without a written goal and a defined end date tends to run forever at a low simmer instead of actually working.

Campaign Name:

Dates (start - end):

Goal (specific number, not "more awareness"):

Target Segment (from your Ideal Customer Profile):

Primary Offer or Message:

Channels Used:

Budget:

Who Owns This:

Success Metric & Target

After It Runs: What Worked / What Didn't

6. Monthly KPI Tracking Sheet

Update this once a month. The trend across months matters more than any single month's number, one slow month isn't a crisis, three in a row is a signal.

Monthly KPI Tracking	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Website Visitors												
Leads / Inquiries												
Cost per Lead												
Leads → Customers												
New Reviews												
Revenue from Marketing												

Soundview Marketing Group builds and manages annual marketing plans like this one for Long Island businesses end to end. [Get Your Free Growth Plan →](https://soundviewmarketinggroup.com/free-growth-plan)
soundviewmarketinggroup.com/free-growth-plan