

# Planner

## 12 MONTHS MARKETING & PROFIT PLANNER



  
*Leading Lady*  
Entrepreneurs Network



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# CONGRATULATIONS

## **On becoming a Leading Lady Boss!!!!**

We are so proud of you for taking the step to empower yourself and be the Leading Lady of your life.

The contents of this workbook are intended as a guide to help you take the leap of self discovery and empowerment as you embark on your journey of being a Leading Lady Entrepreneur.

As a woman, you are already familiar with the many balls that we juggle in our daily lives of being mothers, wives, employees, sisters, friends, aunts, girlfriends, business owners, students, etc. Despite our efforts to handle it all with prowess, it can get overwhelming, confusing, frustrating and sometimes even lonely. We spend so much time grasping at straws, winging it and hoping our efforts will yield the best results.

Add to this, the constant changes in technology, the recent Covid-19 global pandemic and fluctuating economic conditions - all of which can make even the most savvy of women feel defeated and hopeless. This is where Leading Lady Entrepreneurs Network features.

We provide business and lifestyle resources for female business owners and professionals that educate, entertain and empower women to have :

- *Positive mind sets*
- *Promote healthy relationships with self and others*
- *Empower career and business goals*
- *Encourage multiple revenue stream generation and proper financial management*

It is our hope and aim that you will join our online community of Leading Lady Entrepreneurs and use this as well as other resources we have available to become the Leading Lady of your life.

Join our Facebook group <https://facebook.com/groups/leadingladyentrepreneurs>

Download the Leading Lady Entrepreneurs Manifesto

Visit our website <https://leadingladyboss.online>

Shop our range of courses and other resources meant for Leading Lady Bosses!



“

"IF YOU FAIL TO  
PLAN, YOU ARE  
PLANNING TO FAIL."

- BENJAMIN FRANKLIN

”

# *Introduction*

**Smart business owners know that planning is the key to higher profits. In fact, if you ask many entrepreneurs what they have in the works, they will be able to tell you nearly every promotion and product coming up for the next 12 or even 24 months.**

**But, creating that kind of long-term plan does not come naturally for many people. You have to not only have a vision for where you want your business to go, but you also have to know what you need to create (and when), be able to assign tasks to your Virtual Assistant or other team members, work in some additional promotions for complementary products, and still leave room for last minute offers.**

**Whew! No wonder we get so overwhelmed when it comes to planning. The “suck it out of your thumb” business plan seems so much easier to do!**

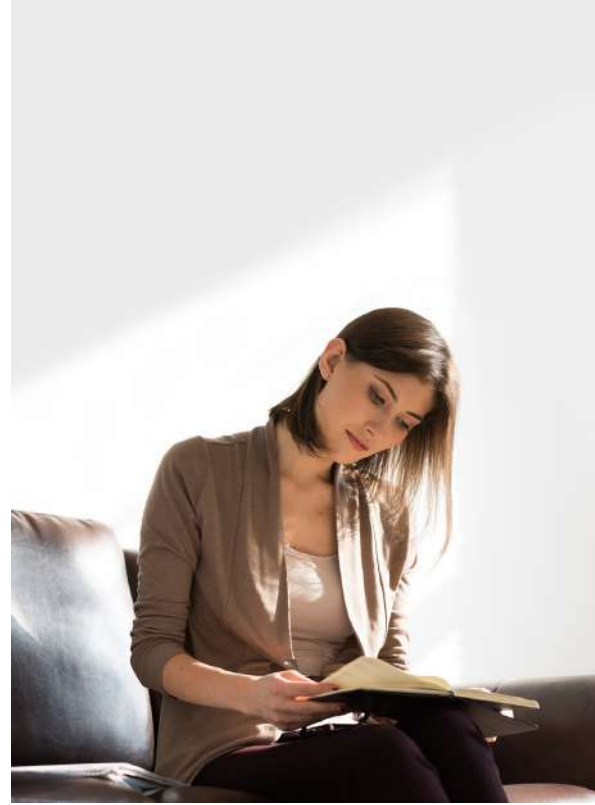
**However, that type of business plan, unfortunately, won't help to grow your income. You need to have a solid plan that will help you realise your milestones and most importantly build you lots of income.**

**So let's get planning and make your next 12 months as easy (and profitable) as possible!**

## STEP 1

# REVIEW LAST YEAR

## REFLECTION ON YOUR PREVIOUS PERFORMANCE



Before you can clearly see what direction you want to take for the next 12 months, you need to look back at where you've been. You'll find lots of useful information in your stats and sales figures for the past 12 months, and you might even discover that you did much better than you initially thought.

Start by taking a look at your previous year's goals. What milestones did you hope to achieve? How did your results stack up against those goals? For example, you might want to check things like your:

- Overall sales figures
- Sales figures by product
- Traffic numbers
- Social media growth
- Mailing list subscribers
- Affiliate sales figures

Even if you didn't set a goal in each of these areas, make a note of where you are right now, so that you can measure your progress more accurately as you work on your marketing plan for the coming year.

As you're looking at these numbers, do any of them surprise you? Are you pleased with your email list growth, but disappointed with your Facebook reach? Did you sell more of that ebook or service than you thought you would, or earn less in affiliate commissions than you expected?

For each item that surprises you in some way, ask yourself what you could have done differently, or what may have caused the difference. These answers will help you set more realistic goals for the coming year.



### Exercise: Record Your Year-End Stats

Area / Stats	Goal	Actual	Notes
Overall sales			
Product A Sales			
Product B Sales			
Product C Sales			
Affiliate income earned ( <i>state amount</i> )			
Mailing list			
Website traffic			
Facebook page likes			
Instagram followers			
LinkedIn followers			
Other:			

## STEP 2

# SET YOUR GOALS

MAKE THEM S.M.A.R.T.



**For a business owner, setting goals is the first step toward sustained growth. After all, if you set out on a road trip with no destination in mind, how will you know when you have arrived? Sure, the journey might be fun, but when you are growing a business, that should not be your first concern.**





## 12 Months Marketing & Profit Plan | Step 2: Set Your Goals

When you're setting your goals, it's a good idea to keep the S.M.A.R.T. goal setting model in mind. SMART goals are:

**Specific:** It's not enough to say that you want more sales. Instead, your goal should be "I want to increase my sales by 10%" or "I want to earn R250,000 in the next 12 months." Those are both very specific goals that leave no room for ambiguity.

**Measurable:** You may have heard the quote "What gets measured gets managed," and nowhere is that more true than in business goal setting. Your goals must have some kind of measurement attached to them - either in monetary terms, subscribers, followers, or another countable figure.

**Attainable:** It's great to dream about doubling or tripling your income, but unless you have a solid plan, you might just find yourself discouraged at the end of the year if your goals are not truly attainable. As you create your goals, ask yourself if it really is attainable or not.

**Realistic:** In order for a goal to be realistic, you have to have the skills to pull it off. For example, you might set a goal to win the Miss Universe competition, but if you are a 45-year-old woman who's never lifted more than a cup of coffee, it's unrealistic to expect to reach this goal.

**Time-based:** Good goals have a hard deadline. After all, if you have the rest of your life to add 100 subscribers to your email list, what incentive do you have for working on it today?



## Exercise: Set Your Goals for the Year

Area / Stats	Goal	Actual	Notes
Overall sales			
Product A Sales			
Product B Sales			
Product C Sales			
Affiliate income earned ( <i>state amount</i> )			
Mailing list			
Website traffic			
Facebook page likes			
Instagram followers			
LinkedIn followers			
Other:			

## STEP 3

# THE BIG PICTURE

## HOLIDAYS & SPECIAL EVENTS



Now that you know where you have been and where you would like to go in the future, it is time to begin building your plan to get there.

First up, take a look at the big picture. Every business and marketing plan operates on the same calendar, and smart business owners link their promotions and products to holidays and other events throughout the year. You have no doubt purchased many special deals, which were offered only on Black Friday or Cyber Monday, for example, but there are many others to consider as well.

Dating coaches often create special offers just in time for Christmas or Valentine's Day, since those are the times that single people tend to feel the desire for a date. Business coaches might find success with a goal-setting program just in time for January. Supermarkets and clothing shops capitalise on seasons like Spring, Winter or Christmas holidays to appeal to consumers needs or traditions.

Don't just stick to the obvious, though. Surprise your market with the unexpected, and you might just see a surge in sales you didn't expect. For example, health coaches in certain parts of the world might encourage their clients to start a workout routine when Daylight Saving time ends in the autumn to "take advantage of that extra hour." Business coaches may consider offering a business kick-start package just in time for the New Year. Or what about "Chaos Never Dies Day"? A fun holiday that is perfect time for savvy virtual assistants to offer a great deal on chaos-killing packages to overwhelmed entrepreneurs.

So grab a yearly calendar and begin to fill in the big picture events and holidays that can be used as timely promotions in your business.

**Exercise: Fill in Your Calendar with Big Picture Holidays and Events**

Month	Holidays	Other Events, Travel, Conferences, etc.
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

## STEP 4

# PLAN YOUR PRODUCTS & SERVICES

## WHAT ARE YOU SELLING?



Now that you have seen the big picture, it is time to start filling in your marketing calendar with your products and promotions. And the first step to doing that is to take stock of what you already have. Include everything that is:

- *Complete and ready to sell (and which maybe has been selling previously)*
- *Partially done*
- *Still in the planning stages*



## Exercise: Take Stock

Product / Service	Status (Complete / Incomplete/ Etc.)	Notes

**Next, take a look at the calendar you created. Which products are a good fit for each month or season? Don't worry just yet if the products are finished—we'll work on that in a later section—for right now, we are only interested in what promotions you can plan for the upcoming year.**

## Exercise: Schedule Your Promotions

Month	Products or Services to Promote
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

## STEP 5

# COMPLIMENTARY PRODUCTS & SERVICES



**Got a few holes in your schedule? That is not surprising. In fact, it would be a rare thing for your products alone to completely fill your marketing calendar. Not only would it make for a very busy year for you, but it would also exhaust your list. After all, no matter how loyal your fans, they need input from others as well.**

So consider your colleagues and even competitors. What products do they offer that you can use to fill in your calendar? What events (webinars, workshops, or conferences) can you share with your audience?

Many business owners (like you!) plan their promotions months in advance, so reach out to those you admire and respect and ask if they have a marketing calendar to share. Even if they don't, a quick search of your email archives will probably reveal the general timing of big promotions.

Fill in the blank spots in your calendar with upcoming promotions and launches that your market needs to know about. Remember, the ultimate goal is to provide the very best information and resources to your audience, so don't be afraid to say, "This program [from another seller] is a great deal for you."





### Exercise: Schedule Your Complimentary Promotions

Month	Products or Services to Promote
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

## STEP 6

# PLAN YOUR NEXT SIX WEEKS



Now that you have got your annual calendar filled in, it is easy to look at that and become overwhelmed.

Keep in mind, though, that you do not have to tackle everything at once. In fact, you will be much more successful if you focus only on the next few weeks. You will keep the big picture in mind, but when it comes to where you spend your time, you will only be worrying about what is coming up in the next 45 days.

This gives you plenty of time to finish up any product or program that is not quite ready for sale, plan a launch, and get all the content in place that you will need. You will even have time to plan free webinars and other promotional events, if you like, helping you stay ahead of time, minimise the overwhelm and procrastination that is likely to occur during the planning phase.

## Exercise: Plan Your Marketing

Week / Date	Primary Task <i>(launch, teaser, etc.)</i>	To-Do
<i>Week X - Dates:</i>	<ul style="list-style-type: none"> <li>• <i>E-mail Mon/Wed/Fri</i></li> <li>• <i>Product review</i></li> <li>• <i>Beef up YouTube Channel</i></li> <li>• <i>Open new cart for sales</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Schedule e-mails</i></li> <li>• <i>Finish product / program</i></li> <li>• <i>Edit Videos</i></li> <li>• <i>Create Facebook Ad</i></li> </ul>
<b>Week 1 - Dates:</b>		
<b>Week 2 - Dates:</b>		
<b>Week 3 - Dates:</b>		
<b>Week 4 - Dates:</b>		
<b>Week 5 - Dates:</b>		
<b>Week 6 - Dates:</b>		

## STEP 7

# ENLIST SOME HELP

YOU CAN'T DO IT ALL BY YOURSELF



**Still feeling overwhelmed? Even the most well-planned and organized marketing calendar won't get the work done for you.**

There are still:

- *Videos to record & edit*
- *Social media ads copy to write*
- *Blog posts to create*
- *Emails to send*
- *Podcasts to edit*

The list is endless—and that doesn't even include the behind-the-scenes work such as customer service, shopping cart maintenance, project management and all the other things no one notices until they break.



## 12 Months Marketing & Profit Plan | Step 7: Enlist Some Help

If you truly want to create a 12-month cash calendar, then now is the time to hand off those tasks you don't want to or cannot do. Using your 6-week task list, make a new list that includes only the tasks you must do. These might include things such as writing your emails, recording videos and podcasts, and intake calls for new clients.

**The rest can—and should—be outsourced.**



### Exercise: Schedule Your Team

Task	Outsourced to	Due date

# Keep the Momentum Going With Regular Reviews

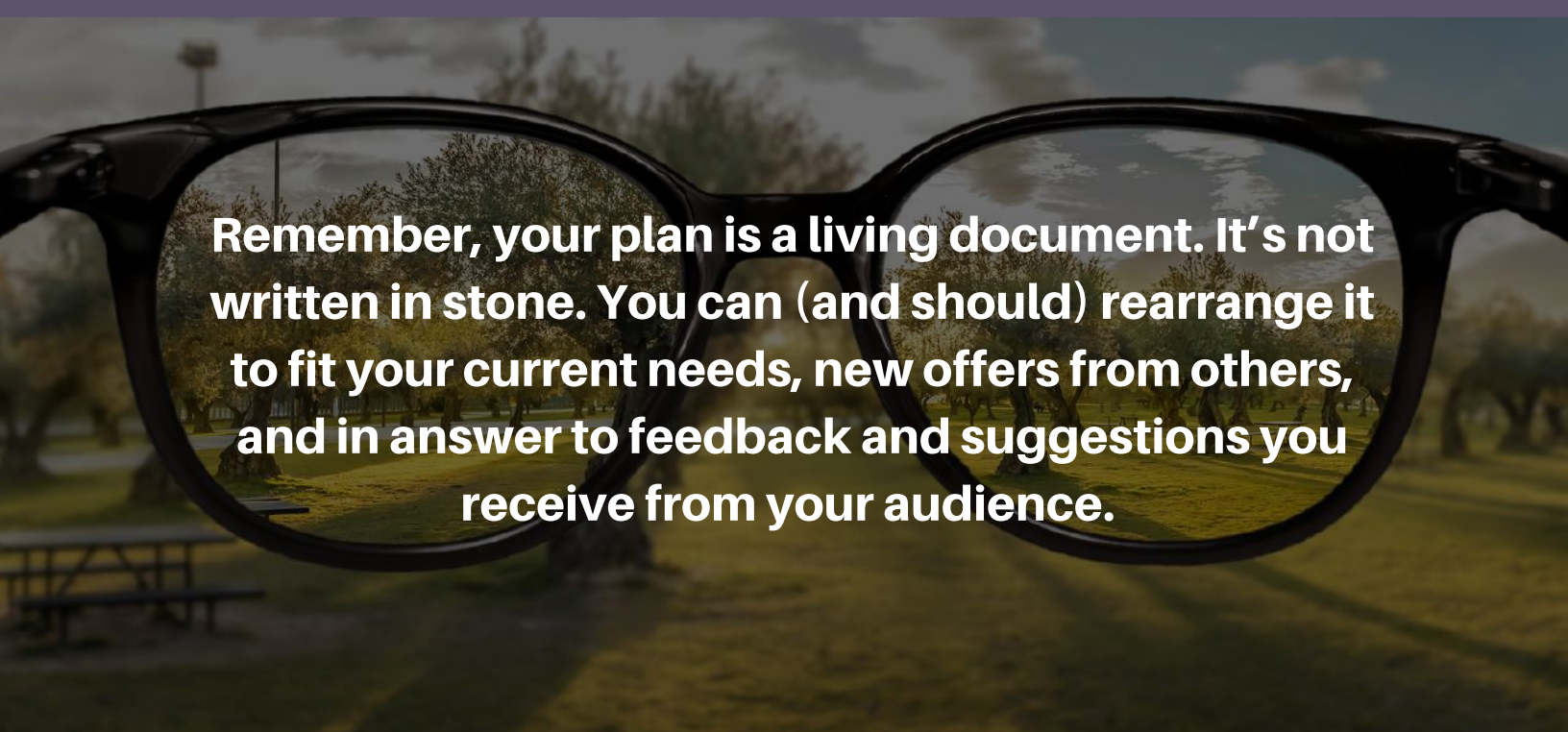
Even the most well planned marketing calendar will not produce results without ongoing care and feeding.

Schedule time each week to:

- Review tasks assigned to your team
- Review tasks assigned to you (consider hiring a project manager if you're bad at personal accountability)
- Review current promotions from your colleagues, contemporaries, and competitors: Do any of these fit with your existing calendar?
- Look ahead to the next few weeks to spot the holes in your schedule

In addition, you'll want to do a more thorough review each month, which will include:

- Your next 6-weeks of planning
- Scheduling time to update/create products and programs
- Review your long-term calendar for changes and updates
- Review new technology related to your market: Do you need to move things in your calendar to accommodate that hot new social network?



**Remember, your plan is a living document. It's not written in stone. You can (and should) rearrange it to fit your current needs, new offers from others, and in answer to feedback and suggestions you receive from your audience.**

# THANK YOU

Thank you for signing up and downloading our planner.

We are so proud of you for taking the step to empower yourself to be the Leading Lady of your life.

It is our hope and aim that you will join our online community of Leading Ladies and use this as well as other resources we have available aimed at imparting knowledge and skills to help you improve the following key areas of a Leading Lady Entrepreneur's life:

- **Mindset**
- **Healthy Self love**
- **Business and Professional development**
- **Income generation and management**

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