

MARKETING ROADMAP

Create an 8 Week Plan Quickly

Workbook & Template



Our Success Group





Self Assessment

Where are you now with your marketing plan?

What marketing strategies have worked best for you, and why?

Where are you now with your business goals for the year?

Where do you want to be financially or impact-wise by the end of the year?

How much effort/sacrifice (expanding your comfort zone) **will be required to end the year there?**

Am I willing to give what is required and make that commitment to myself?

What do I need to ask for help with? Who do I need to ask?

What resources (tools, people, knowledge) do you already have that can support your marketing efforts for the rest of the year?



@OurSuccessGroupPro





Reason | Values

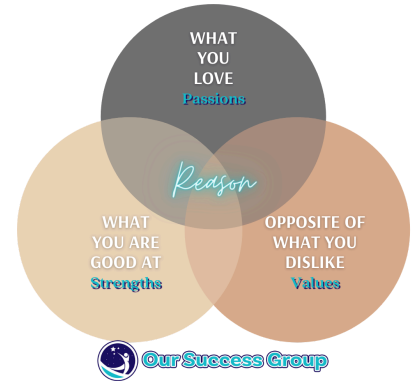
Clarify Your Reason!

To be unstoppable, you have to clearly know why you are doing something. A clear purpose or vision shines a light on the path and success leaves clues. With clarity of purpose and living in your significance or greatness zone, you will have the map showing you those clues.

Find Your Why Guide - [OSG.link/why](https://oursuccessgroup.pro.viasurvey.org/)

Take the [VIA Character Strengths Test FREE](https://oursuccessgroup.pro.viasurvey.org/)
<https://oursuccessgroup.pro.viasurvey.org/>

CLARIFY YOUR REASONS



Why are you REALLY in Business? Why this business?

Strengths	Passions

Pet Peeves	Values

Your REASON



@OurSuccessGroupPro





SWOT

SWOT Analysis Template



This resource is a beautiful way to look at many things inside your business and ensure you look at it from all angles. Items like your personal role, the unique value proposition in marketing, how a new product might fit your customer's needs, or many other comparisons. Be as honest and details as possible.

STRENGTHS



What are your (or your company's) major strengths? AND What is in it for the customers?

Do NOT dwell or fret over the weaknesses or threats. This process is to make sure there are no blind spots. Completing the details should help you face any challenges and determine if you are going over, around, under, or through them.



WEAKNESSES

What are some of the weaknesses to be aware of? Also could this potentially be a strength?



OPPORTUNITIES

What is the future potential and what are your plans to take advantage of them?

Questions?



THREAT



The main obstacles to deal with, like competitors or other challenge.

Can any of your strengths help improve your weaknesses or combat your threats? If so, please describe how below.

Strengths

Weaknesses

Opportunities

Threats



@OurSuccessGroupPro





Ideal Customer Details

Avatar Details

AGE: 18-24 • 25-34 • 35-44 • 45-54 • 55-64 • 65+

GENDER: Male • Female

SPECIFIC LOCATION: _____

ETHNICITY: American Indian • Asian • Black • Hispanic • White • Other: _____

LANGUAGES THEY SPEAK: _____

EDUCATION LEVEL: Associate Degree • College Grad • Doctorate Degree • In College • High School Grad
• In Grad School • In High School • Master's Degree • Other: _____

WORKPLACE: Beauty • Caretaking • Construction • Cook • Delivery • Driver • Electrician • Farmer • FireFighter
• Nurse • Office • Police • Retail • Server • Other: _____

MONTHLY INCOME: Less Than \$1k • \$1k-\$5k • \$5k-\$10k • \$10k-\$20k • \$20k-\$50k • \$50k-\$100k • Over \$100k

HOMEOWNERSHIP: First Time Home Buyer • Homeowners • Renters

MARITAL STATUS: Single • Married • Divorced • Widowed • Engaged

ANNIVERSARY: Anniversary Within 30 Days • Anniversary Within 31-60 Days • Newly Engaged (1 Yr / 6 Mo / 3 Mo)
• Newlywed (1 Yr / 6 Mo / 3 Mo)

PARENTS: New Parents • All Parents • Parents W/ Preschoolers • Parents W/ Early School-Age Children
• Parents W/ Preteens • Parents W/Teenagers • Parents W/ Toddlers • Parents W/ Adult Children

Persona Details

INTERESTS: Volunteering • Memberships • Sports • Art • Education • Travel • Pets • Music • Family • Religion

Examples/Details: _____

POLITICS: Conservative • Liberal • Moderate • Very Liberal • Very Conservative • Favorite Politicians: _____

WHERE DO THEY HANG OUT: Bar • Church • Club • Coffee Shop • Mall • Museum • School • Online • Other:
_____ Exact Places You'd Find Them: _____

BOOKS THEY READ: Comics • Drama • Fantasy • Fiction • History • Horror • Mystery Non-Fiction • Poetry
• Romance • Science Fiction • Self-Help • Thriller • Travel

Favorite Books: _____

EVENTS THEY GO TO: Art Festival • Concerts • Conferences • Networking Mtgs • Seminars • Social • Work Meetings

Examples/Details: _____

PEOPLE THEY FOLLOW: Artists • Athletes • Celebrities • Influencers • Musicians

Examples/Details: _____

WHERE DO THEY GET THEIR INFORMATION: Newspaper • TV • News Apps • Social Media • Word of Mouth

Examples/Details: _____

PERSONAL CORE VALUES: Integrity • Honesty • Accountability • Teamwork • Quality • Value • Passion • Fairness

Examples/Details: _____

SOCIAL CAUSES THEY ARE MOST PASSIONATE ABOUT: Gay Marriage • Racism • Poverty • Hunger • Abortion

• Climate Change • Gender Equality • Healthcare Reform • People with Disabilities • Mental Health • Economy

Examples/Details: _____

HOW WOULD THEY LOOK FOR YOUR PRODUCTS/SERVICES: Ask a Friend • Google Search • Yellow Pages

• Repeat Customer • Social Media Recommendation • Free Content • Hashtags

Examples/Details: _____

HOW WOULD THEY LIKE TO BE PERCEIVED:

Details: _____



@OurSuccessGroupPro





BIGGEST EXTERNAL CHALLENGES: Doesn't Know Art • Trouble Standing Out • Need a Tactile Memory
 • Identify with a Community • Maintaining Focus on Core Business • Lack of Resources • Offer More to Customers
 Examples/Details: _____

BIGGEST INTERNAL CHALLENGES: Feeling Overwhelmed • Worried About Getting Business • Fear of Forgetting
 • Need for Belonging • No Time/Interest • Going Without • Loose Business
 Examples/Details: _____

WHAT OBJECTION WOULD THEY HAVE TO BUYING YOUR PRODUCTS OR SERVICES:

Specific Details: _____

WHAT DOES SUCCESS LOOK LIKE AFTER BUYING YOUR PRODUCT/SERVICE:

Specific Details: _____

Additional INTERNAL Challenge Evaluators

What would your customer do with more free time and/or more money?

What does your customer dread (as it relates to your products/services)?

What makes your customer frustrated (as it relates to your products/services)?

What are your customer's dreams for their future (or the future of their family)?

What makes your customer feel relieved or relaxed?

What makes your customer feel incompetent (as it relates to your products/services)?

What makes your customer genuinely happy (as it relates to your products/services)?





Niche Market

Customers	Technique	Technology	Services	Marketing

Potential Niche Markets Details:

“Selling to people who actually want to hear from you is more effective than interrupting strangers who don’t.”

~ Seth Godin



@OurSuccessGroupPro





13

Be Interesting:

How can you make your business or content more interesting to your audience?

(List creative ideas for engaging content, offers, or messaging.)

Be Interested:

What steps can you take to show more interest in your customers?

(How can you actively engage with your audience or customers?)

Be Inviting:

What can you do to be more open and inviting?

(What is a clear call to action?)

IDEAL Customer Blueprint

Product/Service Needed What does your product do for your ideal customer? What problems does your product solve for your customer? What needs of your customer does your product satisfy? How does your product improve your customer's life or work?	Persona/Avatar Details What is his or her age, education, occupation, or business? What is his or her income or financial situation? What is his or her situation today in life or work?	Desired Benefits What are the most pressing needs that your product or service satisfies? Why should your customer buy from you rather than from someone else? What makes working with you unique (Hint: It is most likely your unique strengths and abilities)? What are their desires regarding the experience of doing business with you?
Location Where is your customer located geographically? Where does your customer live or work? Where is your customer when he or she buys your product or service? Online, in person, at a craft fair, etc.	Timing What has to happen in your customer's life or work to buy your product? What is the ideal buying time during the next 12 weeks?	Objections / Fears What is your customer's buying strategy? How does your customer go about making a buying decision for your product? What are their fears or reasons for not buying? What past experience has shaped these fears? Are there frustration points that you can solve for them?

Name



@OurSuccessGroupPro





Objective

Specific: What specifically has to happen to achieve this objective? _____

M easurable: I will need (number of things) (actual actions) to achieve this objective. _____

Attainable: I can achieve this objective because _____

Relavant: Achieving this objective links to my ideal customer/order because: _____

Trackable: I will achieve this objective by (Specific Date and Time). _____, _____ at _____:_____.

Budget: What should your budget be for advertising in the 4th quarter? 10 to 25% of expected revenue. What can you afford? (Ask this too, can I afford not to spend money on marketing my business- it's an investment!)

Money: \$ _____

Time Per Week: _____

Offering

[illegible]

@OurSuccessGroupPro





8-Week Marketing Roadmap Template

Primary Objective for the 8-Week Period:

Target Audience Focus

(Who are you trying to reach specifically during this period?)

Key Marketing Message

(What is your main promotional theme or focus?)

Week 1: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 2: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 3: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 4: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 5: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 6: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 7: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Week 8: (Date Range: _____ to _____)

Primary Focus

(What is the main objective this week? Example: Launch early promotions, build an email list, etc.)

Key Activities

Date	Tactic	Message
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Allocation (if applicable) \$ _____

Key Metrics to Track

Weekly Reflection Section

What worked well this week?

What didn't go as planned?

What adjustments need to be made for next week?



@OurSuccessGroupPro





Final Wrap-Up (End of Week 8):

Did you achieve your overall goal for the last 8 weeks?

What were the biggest wins?

What can be improved for future campaigns?

Next Steps:

Evaluate / Adjust

1. Gather Data The data is the actual metrics you've been tracking. It could be click-throughs from your website, engagement on social media, or even your actual business revenue. The key is to collect this data without doing anything with it initially. Just gather it in a place where you can later take a look at it and manipulate it in a clear way. You can use tools like Google Analytics, social media channels, or your own sales records to collect this data.

- **Data Source:**
 - **Metrics Gathered:**
-

2. Review Metrics The next step is to review these metrics. Take a close look at the information you've collected and compare it to what you initially expected. This is not a stage for judgment or emotional reactions; it's purely about understanding your current standing. You'll want to review this data based on your expectations. For example, if your goal was to achieve a certain number, you'll assess whether you're on track to meet that number. This step is about taking the data you've gathered and reviewing it in a way that allows you to understand if you're meeting your expectations or not.

- **Expected Outcome:**
 - **Actual Outcome:**
-

3. Identify Patterns The next crucial step is to identify any patterns or trends in the data. It's essential to approach this without any preconceived judgments or labels like "good" or "bad." The reason for this is that labeling can cloud your ability to genuinely see the patterns. You're looking for reasons why certain results have occurred. This could be influenced by customer interactions, reviews, or other variables. The goal is to identify these patterns or trends that will give you the information you need to make changes. Always question why a particular pattern is occurring until you feel clarity and confidence in your understanding.

- **Patterns/Trends Noticed:**
 - **Possible Reasons for Patterns:**
-



@OurSuccessGroupPro





4. Compare to Goals The next step is to compare these findings to your set goals. This is the stage where you can start making judgments about the results. You'll analyze the data and patterns to see if they align with your goals. For example, if your goal is to achieve 100 of something in 10 weeks, you'll assess whether you're averaging 10 per week. This comparison allows you to determine if you're on track or if adjustments are needed. It's about taking the analysis you've done so far and comparing it to what you aimed to achieve, giving you a clear picture of where you stand in relation to your goals.

- **Current Goals:**
 - **On Track? (Yes/No):**
 - **Adjustments Needed:**
-

5. Assess Time Management The next step is to evaluate how well you've managed your time. This involves being honest with yourself about the tasks that may have taken longer than you initially expected. The aim is not to beat yourself up but to be truthful about your time management. Identify any tasks that took longer than planned and consider how you can either eliminate them, streamline them, or approach them differently. The definition of insanity is doing the same thing over and over again and expecting a different result. Assessing your time management allows you to identify what needs to change so you can achieve better results moving forward.

- **Time Spent on Tasks:**
 - **Tasks to Streamline or Eliminate:**
-

6. Identify Wins and Challenges The next step is to identify both your wins and challenges. It's important to celebrate your wins, no matter how small they may seem. Celebrating your wins keeps you motivated and eager to achieve more. On the other hand, challenges are not there to make you feel incompetent; they're opportunities for learning. Assess these challenges and identify the lessons they offer. The point is not to dwell on what didn't work but to understand how you can improve. By identifying both wins and challenges, you gain a balanced perspective that allows you to maintain your momentum while making necessary adjustments.

- **Wins:**
 - **Challenges:**
 - **Lessons Learned:**
-

7. Adjust Strategies The final step in the self-audit process is to adjust your strategies based on what you've discovered. This is where you take all the insights you've gained from gathering data, reviewing metrics, identifying patterns, comparing to goals, assessing time management, and identifying wins and challenges to make informed decisions. Consider what needs to change in your marketing plan or operational strategies. Maybe it's time to shake things up or look at things from a different perspective. The key is to make adjustments that align with your long-term business objectives. Sometimes, you may find that you need to reset some goals, but do this cautiously. Lowering your goals to meet immediate results can lead to achieving less than what you're capable of.

- **Strategies to Adjust:**
 - **New Strategies to Implement:**
-





Additional Tips As you go through this self-audit, keep in mind that honesty is crucial; this exercise is for your self-improvement. Document as much as you can during each audit. Keeping a record of how you measured what you measured will make future audits more insightful. Don't hesitate to seek external input. Sometimes, when you're too close to a situation, an outside perspective can provide invaluable insights. Whether it's a mentor, peer reviews, or even someone you trust, external input can offer a fresh perspective that you might not have considered.

- **Be honest; this is for self-improvement.**
- **Document as much as you can for future audits.**
- **Don't hesitate to seek external input for a fresh perspective.**

Key Takeaways

What are three important insights or lessons from these webinars?

How will you apply these insights to your marketing efforts?

What actions can you take immediately to start making progress?

Next Steps

What specific milestones do you need to achieve feel successful and reach your business goals?

What potential challenges might come up, and how will you overcome them?



@OurSuccessGroupPro





Who can support you in staying accountable to these next steps?

Congratulations! Now keep your foot on the gas. Celebrate, take some time recharge, and then review the results. After finding the learning lessons, put this process back into motion and create your next executable marketing plan. You got this!



to

Want even more? Check out the No Charge - [SVP Assessment](#)

Using the OSG approach, we'll look at how aligning your SVPs with your business might improve your success. You'll leave with clear action steps and a fresh perspective.



Feeling stuck, overwhelmed, or just going through the motions?

It's easy to lose that spark when you're buried in the day-to-day of running your business. But remember why you started? **What if you could reconnect with that?**

Experience This Free Assessment and See For Yourself

- ✓ Gain a better understanding of what drives you.
- ✓ Find out where your structure might be off.
- ✓ Gain language to use to connect to your customers.
- ✓ Reconnect with your "why" and gain more confidence.



OSG.LINK/THANKYOU



@OurSuccessGroupPro



OurSuccessGroup.com/empower