|  |  |
| --- | --- |
| A pink stamp with text  Description automatically generatedTemplates  | Checklists, planners & processes |



# 1: Your brand template

|  |
| --- |
| **Brand Essentials** |
| **Brand colours** | ***Main colour***RGBCMYKHexPantone***Secondary colour***RGBCMYKHexPantone***Spot colour***RGBCMYKHexPantone |  |
| **Brand fonts** | ***Logo******Company docs***Normal:Headline:Headline 2:Headline 3:***Print*** |  |
| **Logo style & position** | ***Email:******Letterhead:******Website:******Social media:*** |  |



# 2: Ideal client profile

|  |
| --- |
| **Your ideal client profile** |
| ***Your product/service*** |
| ***Business description (your client’s)****Industry**Company size**Location**Number of staff**Annual turnover* |
| ***Business owner/leader’s personal style and values*** |
| ***Personal demographics****Gender**Age**Name* |
| ***Their influencers****What they read online**What they read offline**Who they follow**Social media platforms**Their icons* |
| ***Their problems*** |

***See also Founderpal.ai for avatar creation AI tools***



# 3: Your content strategy

Identify the activities that you feel are the best fit for what you can do consistently. You can always add others later – you DO NOT have to do everything.

|  |
| --- |
| **Content strategy** |
| Blogs |  | Newsletter |  |
| Email campaigns |  | Autoresponders |  |
| Lead magnets |  | Ads (FB, Google, etc.) |  |
| Articles for online platforms |  | Articles for publication |  |
| Podcasts |  | Webinars |  |
| Videos |  | Marketing funnel |  |
| Direct mail |  | Speaking |  |
| Write a book |  | Create a course |  |

NOTES:



# 3b: Your content strategy

When you know where your target audience is most active, concentrate on those platforms.

Ensure your biography on each one is up-to-date and markets your business effectively.

|  |
| --- |
| Social media |
| **Platforms** | Company profile | Personal profile | Potential |
| Instagram |  |  |  |
| LinkedIn |  |  |  |
| Facebook |  |  |  |
| YouTube |  |  |  |
| Threads |  |  |  |
| X (Twitter) |  |  |  |
| Pinterest |  |  |  |
| TikTok |  |  |  |
| *Other* |  |  |  |

NOTES:



# Bonus: LinkedIn personal profile guide

Ensure you have a professional banner showing off your expertise (and company logo) at the top of your personal profile. This template will help you to create the content for all the sections of your profile.

Note: the numbers on the right are the maximum characters available. That doesn’t mean you have to use them all!

### Professional headline

**★ Helping [who to do what?]] ★ key skill/service ★ key skill/service ★**

Xxx/220

### Photo

Aim for friendly and approachable - smile at the camera!

### Contact info:

Edit your profile URL to remove the numbers/letters at the end

Suggest …

Add your phone number (business)

Use your business email address (not aol, gmail, Hotmail, etc.).

Add your website

* Select the first website option and choose *Other.*
* This will create a new box to type your description in.

You can have 3 links to websites - either to different sites or to 3 different pages on the same site.

### About

This section is your marketing platform. Choose your key services and use pain or gain headlines

t HEADING 1 t

Blurb

t HEADING 2 t

Blurb

t HEADING 3 t

Blurb

Xxxx/2600

## Experience

### Current role:

NOTE: Delete the company name and when you start retyping ‘XXXXX’ the company page should pop up. Click to connect with this and this will pull the company logo through to your profile.

If you don’t have a company page yet – create one. Go to the Work option (top right on menu bar) and it’s at the bottom of the list).

### Title

Description should feature the company ethos and how you help people - your passion.



# 4: Content generation

These are triggers to start you developing effective articles for your blog or other publications, that will show off your expertise.

**NOTE: The blog trigger list is in a separate document – *Content plan template***

|  |
| --- |
| **Article formula 1** |
| ***Headline [#] Steps to [big benefit]*** |
| * The problem [that your clients experience]
* Why it’s a problem
* Your step-by-step guide to fixing it [numbered list]
* What life will be like with the problem solved
 |
| **Article formula 2** |
| ***Headline [#] Mistakes [target audience] make – and how to avoid them*** |
| * What your clients want to achieve
* Mistake #1 – why people make it and how to avoid it
* Mistake #2 – why people make it and how to avoid it
* [Repeat with each mistake]
* What the big benefits are if you don’t make these mistakes
 |
| **Article formula 3** |
| ***Headline [#] Tips to [achieve what]*** |
| * Introduction – who these tips help and what they help them with
* Numbered list of tips
 |



# 5: Website planner

This is an interactive diagram, so you can add any subpages or additional main pages you want to include.

TIP: Don’t put anything on your navigation that isn’t instantly understandable by anyone who doesn’t already know your business. Stick to idiot-proof names for your pages. This is better for SEO too.



# 5: Website planner 2

### Website purpose:

|  |
| --- |
| **Pages** |
| ***Home***Headline 1 (in image):Headline 2 (above introduction):Introduction (1 paragraph): Featured sections:Product/service 1:Product/service 2:Product/service 3:Thumbnails to other sections e.g. About, Blogs, etc.1.2.3. |
| ***Service/product page template***Headline:Image:Keywords:Call to action: |

NOTE: Doing this exercise for each page will give you material to develop to write the content. Or, if you employ a professional copywriter, an excellent brief for them to follow.



# 6: Social media

The lists below will give you ideas for different approaches to your social media posts. Mix and match the medium with the content type to create interesting social posts.

**NOTE: The interactive content planner is in a separate document – *Content plan template***

|  |
| --- |
| **Style selector** |
| ***Medium*** | ***Content*** |
| Video | Opinion |
| Slide Deck | Question |
| Video Still / Quote | Useful tip |
| Infographic | Someone else’s blog link & comment |
| Text (Short Form) | Interesting image with a comment |
| Image/short text | What am I doing today? |
| Text (Long Form) | Where I’ll be this week |
| Testimonial / Review | Newsletter link |
|  | Quote from your bog post |



# 7: YouTube

|  |
| --- |
| **Video Optimisation Checklist** |
| Action | P |
| Carry out SEO for keywords |  |
| Choose title for video based on top performing keywords |  |
| Create short influencer video (2-5 mins) |  |
| Optimise MP4 file with keywords/title |  |
| Upload to YouTubeInclude title in descriptionCreate thumbnail in Canva.com and optimise png file and uploadSettings: Translations – English |  |
| In Advanced settings:Caption certification: Content ‘never aired in USA’Category: News & PoliticsLanguage: EnglishToday’s dateThen save changes |  |
| Create a playlist with the same name as the video and add the video to it |  |
| Play video to the end – ‘like’ the video |  |
| Add a comment with the video title/keyphrase between \*[title]\* |  |
| Like comment |  |
| Go to 3 dots on right of comment and pin it |  |
| Go to Pingfarm.com (Rapid Indexer) and enter video URL (not channel URL) and mass ping. TIP: Keep window open for a while as this will allow it to ping more sites. |  |
| Go to Medium.com select ‘Write a story’ (under your profile icon). Add the video title/keyphrase as the title, add a short description and URL on YouTube, then publish |  |
| Promote on social media in main feeds and groups/pages, where permitted. |  |



# 9: Newsletters

If you aren’t a writer or have very limited time, this is a simple template to generate a high-value newsletter.

|  |
| --- |
| **Simple newsletter structure** |

### Subject: [Blog title]

[image from blog]

First 3-4 paragraphs from blog

**Read more …**

### Headline

Your offer

Call to action

### Item 3

*Any of the following:*

* Another blog – same format as above
* A tip
* A quotation
* A testimonial

Sign off



# 9b: Email campaigns

|  |
| --- |
| **Email campaign checklist** |
| Campaign Purpose: |
| Number of emails in series: |
| Release dates: |
| Individual email structure: |
| Subject line: [compelling ‘open me’ one liner] |
| Headline for top of email: [Who it’s for, pain they’re experiencing OR big gain they could achieve] |
| Header image: |
| Core message: |
| Key points: |
| Offer and value: |
| Call to action: |
| PS:  |



# 10: Public Relations

|  |
| --- |
| **Media list** |
| Print media |
| Broadcast media |
| Podcast/video interviews |
| Social media campaigns |
| Awards |
| Speaking opportunities |
| Exhibitions |

When you’ve selected your chosen PR channels, add your monthly PR activity into your diary and/or create a separate PR schedule showing your target activity for each month.

*Note: You might combine this with your advertising and marketing planner (see next template).*

|  |
| --- |
| **Media contact plan** |
| **Publication/ broadcast name** | **Email address** | **Proposed article titles** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |



# 11: Direct marketing and advertising

|  |
| --- |
| **Marketing activities** |
| **Advertising:**Print/digital/display (e.g. boards)Publication/location FrequencyCosts | **Direct mail:**Purpose:Sales letterSpecial offer flyerBrochureLumpy mailCosts |
| **Annual budget** | **Resources list** |

Identify your marketing activity for each month and enter in your marketing planner or combine with your PR planner.

Type of campaign: e.g. Advertising/direct mail

Materials required:

Audience:



# 12: Networking

|  |
| --- |
| **Networking planner** |
| ***Frequency*** | ***Type*** | ***Fees*** |
| WeeklyMonthlyOther | MembershipOpen | FreeLow cost (under £25 per meeting)High cost (over £25 per meeting) |

|  |
| --- |
| Groups/Events |
| ***Name*** | ***Frequency*** | ***Type*** | ***Fees*** |
|  |  |  |  |
|  |  |  |  |
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# 12: Networking 2

You can expect to be asked to do a short introduction to you and your business at most networking events, so

# Your elevator pitch

My name is

My business is [BUSINESS NAME]

and we specialise in [KEY DELIVERABLE].

You know how people struggle with [A BIG PROBLEM YOUR CLIENTS HAVE]?

Well, we help them to get past this by [YOUR SOLUTION]

so that they [BIG GAIN THAT THEY GET AS A RESULT OF THE SOLUTION YOU’VE PROVIDED]

and [ANOTHER BENEFIT].

So, if you know any business people who have this kind of problem, we can help!

They can find me at [WEBSITE/PHONE]



# 13: Speaking

|  |
| --- |
| **Speech planner** |
| Your key expert subject | Possible titles for your presentation |
|  |  |
|  |  |
|  |  |
| **Speech structure** |
| **Introduction***To your subject (not yourself – someone else should do that)*Opening attention grabber:Other key introductory information: |
| **Key point 1:***Include anecdotes, quotes, models, diagrams, processes* |
| **Key point 2:** |
| **Key point 3:** |
| **Close:***Plan your closing statement and the big takeaway for the audience.* |



# Bonus: Writing a book

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity** | **P** |
| **1: Research** | Authors who have already written books on this subject |  |
|  | Publishers who have already published books on this subject |  |
|  | What do people search for when they're looking for a book like yours? |  |
| **QUESTION** | *What makes your book stand out from what's already been published?* |  |
|  |  |  |
| **2: Planning** | Chapter subjects |  |
|  | Chapter content development |  |
|  | Chapter structure |  |
| **QUESTION** | *Have you collected all the material you’ll need to write each chapter?* |  |
|  |  |  |
| **3: Publishing** | Will you self-publish, publish with an independent publisher or try to get a contract with a publishing house? |  |
| **QUESTION** | *Do you know the costs of self-publishing and what you get for your money?* |  |
|  |  |  |
| **4: Writing** | Establish deadlines for each stage of writing |  |
|  | Schedule writing time in diary |  |
|  | What will your title be? |  |
|  | What will your subtitle be? |  |
| **QUESTION** | *Have you integrated your key words and phrases into the title/subtitle?* |  |

**Continued >>**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Activity** | **P** |
| **5: Editing** | Who will edit your book? |  |
|  | Who will proofread your book? |  |
| **QUESTION** | *Have you budgeted for editing and proofreading?* |  |
|  |  |  |
| **6: Cover** | Research graphic designers experienced in book cover design |  |
|  | Write back cover blurb |  |
|  | Create your short author bio (you may have a longer one inside the book) |  |
|  | Decide if you want to include a review on the cover |  |
| **QUESTION** | *Who is on your pre-launch reading list?* |  |
|  |  |  |
| **7: Marketing** | What is your launch plan? |  |
|  | Will you be offering a launch bonus/reduced price for the launch campaign? |  |
|  | Are you running a pre-order campaign? |  |
|  | Prepare your social media plan and create the posts leading up to launch |  |
|  | Prepare your email marketing plan and load it into your chosen email marketing platform |  |
| **QUESTION** | *What strategies are you using to grow your reader list?* |  |



# 13b: Marketing a book

|  |
| --- |
| **Book launch campaign** |
| ***Publication date*** |  |
| ***Bonus bundle*** | *[item with value]* |
| ***Landing page created*** | *[link]* |
| ***Registration form*** |  |
| ***Email campaign for registered people written/ loaded*** | *Thank you for registering**3 days to go**2 days to go**1 day to go**On day – 9am/ 3pm/11pm* |
| ***Main email campaign start date*** |  |
| ***# Messages written/ scheduled*** |  |
| ***Social media campaign start date*** |  |
| ***# Social posts created/scheduled*** |  |
| ***Launch booked***  | *[venue or webinar link]* |
| ***Access to bonus items created*** | *[links]* |
| ***Email campaign to purchasers written*** | *Thank you for your purchase/details of how to access bonuses**Remind to access bonuses/results of any competition/draw**+7 days – please write a review**+14 remind to write a review* |



#

# Tools & Resources

### InsideNews.co.uk/the-treasure-chest

*This is a free resource containing many free templates, tools, how-to documents, models, etc.*

### Free royalty-free images

Pixabay.com

Unsplash.com

Pexels.com

Freeimages.com

*These are all free to use and include graphics, photos and video clips.*

### Image libraries

iStockphotos.com

Shutterstock.com

Gettyimages.co.uk

Dreamstime.com

*These are all paid-for options, either by subscription or by individual image purchase. They usually have video options too.*

### Background removal for images

Remove.bg

### Image creation and graphic design

Canva.com

### QR code creator

qrcode-monkey.com

### Email marketing platforms

Aweber.com (free option)

Mailerlite.com

GetResponse.com

MailChimp.com (free option)

ConstantContact.com

Sendfox.com

### Social media distribution

Hootsuite.com

Publer.com

SocialChamp.com

Buffer.com

Tweetdeck.com

*There are many more, these are just a few*

### Video creation tools

Invideo.io

Wave.video

Moovly.com

Powtoon.com

Doodly.com

***GetMunch.com \*NEW AI\****

### Link sharing

Pingfarm.com

Medium.com

### Podcasting tools

Spreaker.com

Anchor.com

Audacity.com

Acast.com

Podbean.com

Buzzsprout.com

iTunes (app)

Spotify (app)

### Speaking training

Toastmasters.org

thePSA.co.uk (the Professional Speaking Association)

Globalspeakersfederation.net

MediaCoach.co.uk

### Publishing

***Independent publishers:***

TheEndlessBookcase.com

Authorhouse.com

iuniverse.com

lulu.com

*There are many more independent publishers, these are just examples.*

***Self-publishing***

IngramSpark.com

### Other useful resources

AppSumo.com – *a software platform with many low cost options for useful tech*

Fiverr.com – *outsourced service suppliers*

Clickbank.com – *platform where people offer their digital products for sale and where you can become an affiliate for other people’s products*

Responsesource.com – *Connection platform between journalists looking for sources and PR companies looking for opportunities for clients*

Calendly.com – *Scheduling tool for meetings*

***Founderpal.ai – Free client avatar generator AI \*NEW AI\****