



TEMPLATES

CHECKLISTS,
PLANNERS
& PROCESSES



1: Your brand template

Brand Essentials		
Brand colours	<p>Main colour</p> <p>RGB</p> <p>CMYK</p> <p>Hex</p> <p>Pantone</p> <p>Secondary colour</p> <p>RGB</p> <p>CMYK</p> <p>Hex</p> <p>Pantone</p> <p>Spot colour</p> <p>RGB</p> <p>CMYK</p> <p>Hex</p> <p>Pantone</p>	
Brand fonts	<p>Logo</p> <p>Company docs</p> <p>Normal:</p> <p>Headline:</p> <p>Headline 2:</p> <p>Headline 3:</p> <p>Print</p>	
Logo style & position	<p>Email:</p> <p>Letterhead:</p> <p>Website:</p> <p>Social media:</p>	



2: Ideal client profile

Your ideal client profile
Your product/service
Business description (your client's) <i>Industry</i> <i>Company size</i> <i>Location</i> <i>Number of staff</i> <i>Annual turnover</i>
Business owner/leader's personal style and values
Personal demographics <i>Gender</i> <i>Age</i> <i>Name</i>
Their influencers <i>What they read online</i> <i>What they read offline</i> <i>Who they follow</i> <i>Social media platforms</i> <i>Their icons</i>
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	<input type="checkbox"/>	Newsletter	<input type="checkbox"/>
Email campaigns	<input type="checkbox"/>	Autoresponders	<input type="checkbox"/>
Lead magnets	<input type="checkbox"/>	Ads (FB, Google, etc.)	<input type="checkbox"/>
Articles for online platforms	<input type="checkbox"/>	Articles for publication	<input type="checkbox"/>
Podcasts	<input type="checkbox"/>	Webinars	<input type="checkbox"/>
Videos	<input type="checkbox"/>	Marketing funnel	<input type="checkbox"/>
Direct mail	<input type="checkbox"/>	Speaking	<input type="checkbox"/>
Write a book	<input type="checkbox"/>	Create a course	<input type="checkbox"/>

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

◆ HEADING 1 ◆

Blurb

◆ HEADING 2 ◆

Blurb

◆ HEADING 3 ◆

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

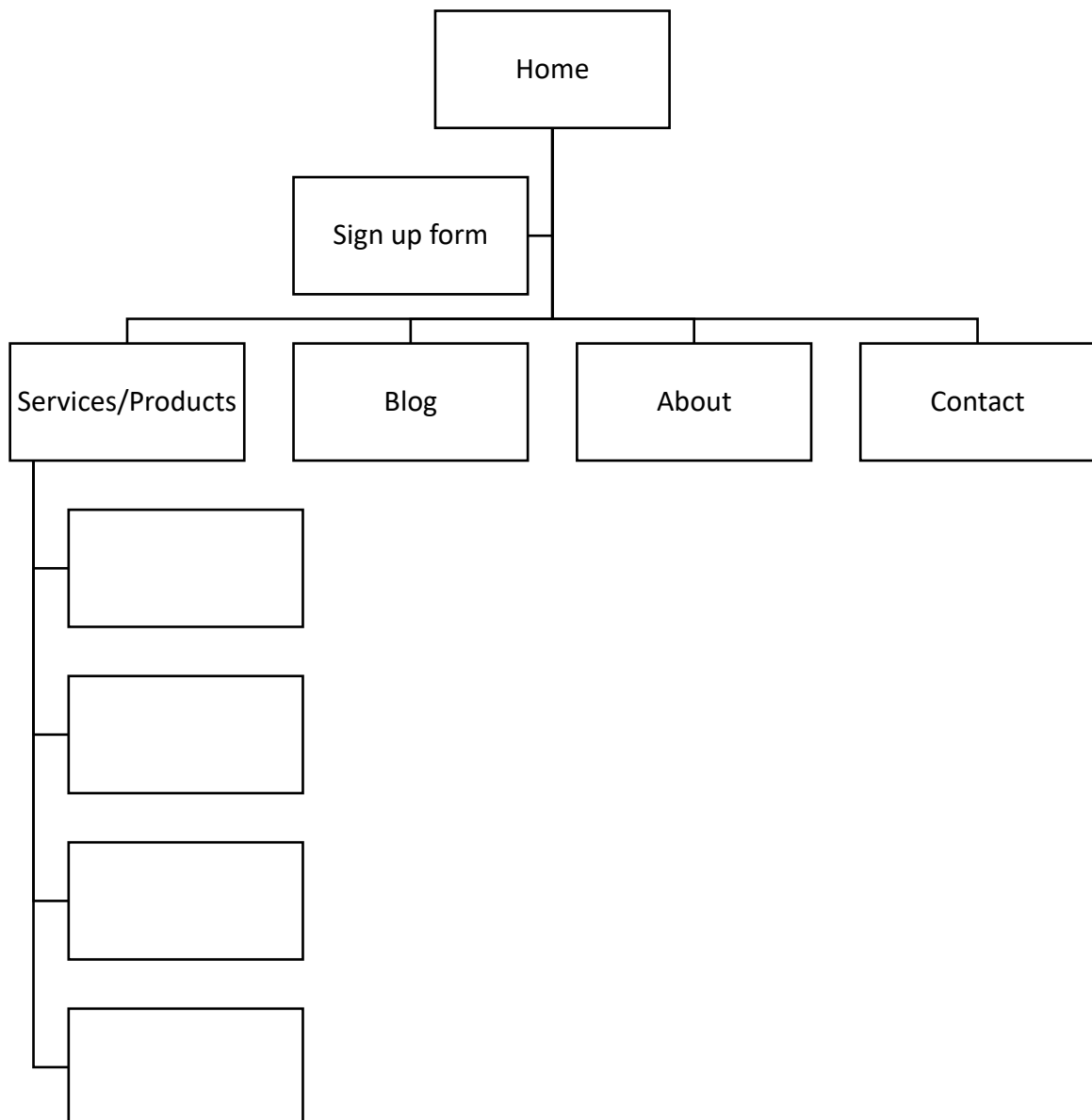
Article formula 1
Headline [#] Steps to [big benefit]
<ul style="list-style-type: none"> • The problem [that your clients experience] • Why it's a problem • Your step-by-step guide to fixing it [numbered list] • What life will be like with the problem solved
Article formula 2
Headline [#] Mistakes [target audience] make – and how to avoid them
<ul style="list-style-type: none"> • 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]
<ul style="list-style-type: none"> • 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	✓
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 YouTube Include title in description Create thumbnail in Canva.com and optimise png file and upload Settings: Translations – English	
In Advanced settings: Caption certification: Content 'never aired in USA' Category: News & Politics Language: English Today's date Then 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	
<p>Advertising:</p> <p>Print/digital/display (e.g. boards)</p> <p>Publication/location</p> <p>Frequency</p> <p>Costs</p>	<p>Direct mail:</p> <p>Purpose:</p> <p>Sales letter</p> <p>Special offer flyer</p> <p>Brochure</p> <p>Lumpy mail</p> <p>Costs</p>
<p>Annual budget</p>	<p>Resources list</p>

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 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	
<p>Introduction</p> <p><i>To your subject (not yourself – someone else should do that)</i></p> <p>Opening attention grabber:</p> <p>Other key introductory information:</p>	
<p>Key point 1:</p> <p><i>Include anecdotes, quotes, models, diagrams, processes</i></p>	
<p>Key point 2:</p>	
<p>Key point 3:</p>	
<p>Close:</p> <p><i>Plan your closing statement and the big takeaway for the audience.</i></p>	



Bonus: Writing a book

Stage	Activity	✓
1: Research	Authors who have already written books on this subject	<input type="checkbox"/>
	Publishers who have already published books on this subject	<input type="checkbox"/>
	What do people search for when they're looking for a book like yours?	<input type="checkbox"/>
QUESTION	<i>What makes your book stand out from what's already been published?</i>	<input type="checkbox"/>

2: Planning	Chapter subjects	<input type="checkbox"/>
	Chapter content development	<input type="checkbox"/>
	Chapter structure	<input type="checkbox"/>
QUESTION	<i>Have you collected all the material you'll need to write each chapter?</i>	<input type="checkbox"/>

3: Publishing	Will you self-publish, publish with an independent publisher or try to get a contract with a publishing house?	<input type="checkbox"/>
QUESTION	<i>Do you know the costs of self-publishing and what you get for your money?</i>	<input type="checkbox"/>

4: Writing	Establish deadlines for each stage of writing	<input type="checkbox"/>
	Schedule writing time in diary	<input type="checkbox"/>
	What will your title be?	<input type="checkbox"/>
	What will your subtitle be?	<input type="checkbox"/>
QUESTION	<i>Have you integrated your key words and phrases into the title/subtitle?</i>	<input type="checkbox"/>

Continued >>

Stage	Activity	✓
5: Editing	Who will edit your book?	
	Who will proofread your book?	
QUESTION	<i>Have you budgeted for editing and proofreading?</i>	

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	<i>Who is on your pre-launch reading list?</i>	

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	<i>What strategies are you using to grow your reader list?</i>	



13b: Marketing a book

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



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*