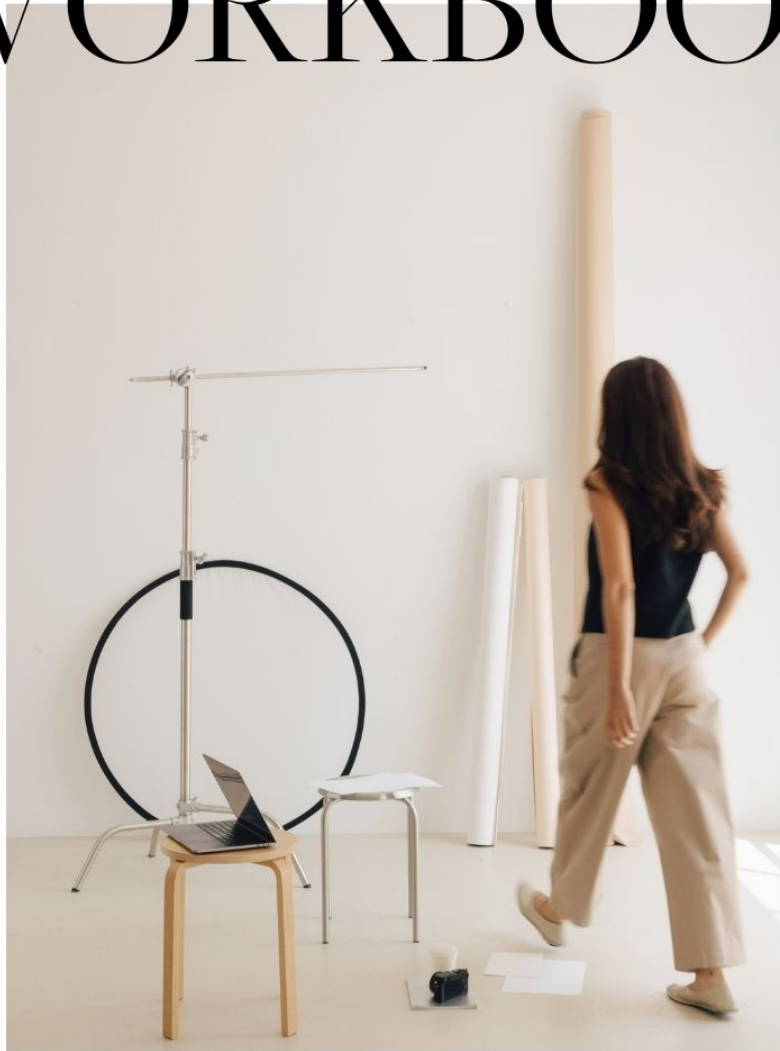




Plan Your 2025

WORKBOOK



VISION | ACTION | PLAN

Plan Your 2025 *Workbook*

Let's get planning! This workbook is designed to help you reflect on key themes across all of your marketing channels as well as help you plan your next steps.

We're going to work through each area of your marketing funnel, identifying activities which are quick wins and brainstorming content topics which will form the foundation of your marketing plan.

Stages Of Your Marketing Funnel:

1. AWARENESS
2. ENGAGEMENT
3. CONVERSION
4. RETENTION

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AWARENESS

This is the lead-gathering stage of your funnel. The activities you carry out here are designed to attract the attention of new leads to feed your funnel with.

Most new lead-generating marketing activities will require you to produce some kind of content. Eg. Lead magnet or blog posts for SEO, so understanding what kind of information your ideal clients really need, is vital at this stage.

Area	Activity / Opportunity	Action
Social Media	Consistent posting	Weekly plan
	Other platforms	Research your audience
	Content strategy	Research topics / buckets
	Hashtags / trending	Research what's working
SEO	Blog posts for SEO	Research keywords
	Blog posts for expertise	Plan topics
	Landing pages / directory	
List building	Lead magnet	Plan topic
	Conversion sequence	Choose platform & build
	Regular email content	Choose format
Personal outreach	Engaging on social	Calls to action
	Personal emailing	
Partnerships	Supplier collabs	
Paid ads	Meta / Google	
	Influencer recruitment	

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Awareness Reflection Questions

What are the most pressing problems, biggest pain points or worries that your product or service can solve?

Think about what they really want vs. what they say they need.

If your client could wave a magic wand, what would they instantly get or fix?

What makes your clients nervous or concerned before and during your work with them?

What questions do you get asked the most about what you do?

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ENGAGEMENT

Once your audience becomes aware of you, you will need to encourage them to engage with you and your content. The activities you carry out here should position you as the expert they need to work with, so that they are no longer making their decision based on price, but on trust and desire.

Most engagement marketing activities will require you to produce some kind of expert content. Eg. Expert blog posts or guides, so understanding your 'area of genius' and your client's most pressing pain points is vital.

The good news is that content you produce for this stage will form the foundation of your permanent marketing funnel and will be used again and again.

Area	Activity / Opportunity	Action
Expert website content	Blog posts	
	Lead magnet / guides	
Expert social content	Behind the scenes	Eg. Reels
	Testimonials	
	'How to' content	Eg. Carousels
List engagement	Conversion sequence	3-4 emails
	Regular email content	
Partnerships	Supplier collabs	Blog posts, Instagram live
Paid ads	Simple Meta retargeting	

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Engagement Reflection Questions

How would your client's life look and feel different if they had your solution?

What negative results might there be for your clients if they did nothing or didn't work with you?

Think about the thing that you love doing the most and that you know surprises and delights your customer.

What do clients most commonly tell you they love about working with you?

What knowledge or skill were they surprised to find you have?

What steps do you take, as part of your routine, without really thinking about it, to get the absolute best result every time and avoid any negative outcomes?

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CONVERSION

If you have an engaged audience, they are at the enquiry stage and you want to make sure that you're reassuring them about their decision and rolling out the red carpet. You've worked so hard to get them here that you want to make sure you're making the most out of the opportunity to book them as a client.

At this stage, you need to be looking at your enquiry process and sales workflow.

Area	Activity / Opportunity	Action
VIP enquiry experience	Automated sequence	Simple 3-4 emails
	Personal touches	Eg. Bonjour, video review
	Expert content	Guides
Sales page	The 'experience'	Document your process
	Pain point content	
	Social proof	Key testimonials / video
Sales call	Structure of call	Sales script / journey
	Follow up strategy	Thank you content
Testimonials / social proof	Collection system	Semi automated
	Case studies	1 or 2 key clients
	Organic social proof	Social screenshots

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Conversion Reflection Questions

At this stage, you will need to be able to present your product / explain what you sell in relation to their pain points.

What is your offer?

What evidence do you have that it has worked for other people just like them?

Eg. case study, video testimonials, facts and figures, social media comments and messages

What questions do you get asked most frequently before people book?

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RETENTION

This part of your client journey is obviously about how you deliver an amazing service, but also how you 'offboard' your clients so that they become raving fans.

You can semi-automated parts of your workflow (eg. testimonial collection) but also leave room to surprise and delight them (eg. gifting).

Area	Activity / Opportunity	Action
Onboarding experience	Welcome packet	What to expect / timeline
	Personal touches	Welcome gift
	Expert content	Planning guide
Service delivery	Update process	Eg. weekly email
	Tools to reduce friction	Eg. content collection
Off boarding	Handover procedure	Eg. checklist
	Thank you	Card or bonus gift
	Next steps	Exclusive content / access
Testimonials / social proof	Collection system	Semi automated
	Case studies	1 or 2 key clients
	Organic social proof	Social screenshots
	Influencer video	Can be paid
Affiliate / referral system	Rewards or discounts	Eg. Referral cards

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Retention Reflection Questions

This is the stage that most small, creative businesses absolutely excel at but when you're busy, it's possible to drop the ball with finishing touches.

How do you make your clients feel special when they book you?

What do you give them to make them feel excited about the process?

What do you show them to reassure them about your expertise?

Which parts of your service delivery you could automate?

Do you automate testimonial collection?

How do you encourage and reward referrals? Could it be formalised in some way?

Notes