

One-page marketing plan template

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How to use this template: Print it and fill it in by hand, or copy the sections into your own document. Fill in Page 1 (your strategy), then Page 2 (your plan). Rough numbers are fine; 'don't know' is a useful answer. Most people finish in about two hours. A filled-in example is at the end if you'd like to see what a finished plan looks like.

PAGE 1: STRATEGY ON A PAGE

1a. Where you are now

	Your figure
Turnover (last 12 months)	
Total marketing spend per month (include agency fees and tools)	
Enquiries per month	
Sales per month	
Average sale value	
Enquiry-to-sale conversion rate (sales ÷ enquiries)	
Where enquiries come from (if known)	

If you don't know where your enquiries come from, write that down. It's your first finding, not a failure.

1b. Where you want to be in 12 months

One sentence. Use a number, not a range.

1c. Who your best customers are

Think of the three customers you'd most like more of. What do they have in common? (Size, sector, location, the problem they came to you with, who makes the decision.)

1d. Why they choose you over competitors

What do your best customers say when they explain why they picked you? Use their words if you can.

1e. One or two priorities for the year

No more than two. Everything on Page 2 should support at least one of these.

1. _____
2. _____

Check: if Page 1 runs over one page, it probably isn't a strategy yet. Cut until it fits.

PAGE 2: THE PLAN

2. Targets: work backwards from your sales goal

Step	How to work it out	Your figure
A. New sales target for the year (£)	Pick one number	
B. Monthly sales target (£)	$A \div 12$	
C. Average sale value (£)	From Page 1	
D. Sales needed per month	$B \div C$	
E. Enquiry-to-sale conversion rate	From Page 1 (e.g. 1 in 4 = 25%)	
F. Enquiries needed per month	$D \div E$	

3. Budget by channel

Cost per enquiry = monthly budget $\div$ expected enquiries. Give every line one named owner.

Channel	Monthly budget (£)	Expected enquiries per month	Cost per enquiry (£)	Owner	How it's measured
Google Ads					
Meta / social ads					
SEO / website					
Email					
Events / PR					
Agency or freelance fees					
Tools and software					
Other					
Total					

Overall figures	How to work it out	Your figure
Expected sales per month	Total expected enquiries × conversion rate (E)	
Overall cost per enquiry	Total budget ÷ total expected enquiries	
Overall cost per sale	Total budget ÷ expected sales per month	
Gap to target	Enquiries needed (F) minus total expected enquiries	

4. Measurement checklist

- ☐ Conversion tracking is set up on the website (forms, calls, sales)

- ☐ Conversion tracking has been tested recently by making a real test enquiry
- ☐ Every enquiry is recorded with its source (e.g. Google Ads, referral, email)
- ☐ One named person reports the numbers each month: _____
- ☐ The one number at the top of the monthly report is: _____

5. Quarterly review

Review dates (put them in the diary now):

Q1	Q2	Q3	Q4

At each review:

Channel	Keep, change or stop?	Why

What we learned this quarter:

SENSE CHECKS

Read these before you share the plan. None is automatically wrong, but each deserves an answer.

- ☐ **Can the budget buy the enquiries?** Are the enquiries you need (F) more than your total expected enquiries at the cost per enquiry you've entered? If so, the target, the budget or the cost per enquiry has to change.
- ☐ **Is the paid spend tracked?** Do you have a large paid ads budget but haven't ticked that conversion tracking is set up and tested? Fix tracking before increasing spend.
- ☐ **Is everything in one basket?** Does most of your budget sit in a single channel? That can be right, but know why, and know what you'd do if it stopped working.

- ☐ **Does every line have an owner?** A channel with no owner is a channel nobody is checking.
 - ☐ **Does every line link to a priority on Page 1?** If not, ask why it's in the plan.
 - ☐ **Have you included the hidden costs?** Agency fees and software subscriptions are part of what each enquiry costs.
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WORKED EXAMPLE

This is a made-up example to show how the maths works. It isn't a client and the figures aren't client data.

Targets

Step	Example
A. New sales target for the year	£360,000
B. Monthly sales target	£30,000
C. Average sale value	£2,000
D. Sales needed per month	15
E. Conversion rate	1 in 4 (25%)
F. Enquiries needed per month	60

Budget: what Google Ads would need to cost

Scenario	Cost per enquiry	Enquiries	Monthly budget	Cost per sale (budget ÷ 15)
If enquiries cost £50	£50	60	£3,000	£200
If enquiries cost £120	£120	60	£7,200	£480

What this shows: the same target costs more than twice as much if enquiries cost £120 rather than £50. That's why cost per enquiry matters more than clicks. In a real plan, add agency fees and tools to the budget table too; they raise the true cost per sale.

Want a second opinion on your plan? Book a free consultation at marketingbycaroline.co.uk/contact or email hello@marketingbycaroline.co.uk. Talk me through it and I'll tell you plainly what I'd keep, what I'd change and what I'd stop.