

CASH CALENDAR:
YOUR 12 MONTH
MARKETING +
PROFIT PLAN!

Cash Calendar: Your 12 Month Marketing + Profit Plan!

Smart business owners know that planning is the key to higher profits. In fact, if you ask many entrepreneurs what they have in the works, they'll be able to tell you nearly every promotion and product coming up for the next 12 or even 24 months.

But creating that kind of long-term plan doesn't come naturally for many people. You have to not only have a vision for where you want your business to go, but you also have to know what you need to create (and when), be able to assign the tasks to your VA or other team members, work in some additional promos for complementary products, and still leave room for last minute offers.

Whew! No wonder we get so overwhelmed when it comes to planning. The "seat of your pants" business plan seems so much easier! Unfortunately, that type of business won't help to grow your income, so let's get planning and make your next 12 months as easy (and profitable) as possible!

Review Last Year

Before you can clearly see what direction you want to take for the next 12 months, you need to look back at where you've been. You'll find lots of useful information in your stats and sales figures for the past 12 months, and you might even discover that you did much better than you initially thought.

Start by taking a look at your 2015 goals. What milestones did you hope to hit? How did your results stack up against those goals? For example, you might want to check things such as:

- Overall sales figures
- Sales figures by product
- Traffic numbers
- Social media growth
- Mailing list subscribers
- Affiliate sales figures

Even if you didn't set a goal in each of these areas, make a note of where you are right now, so that you can measure your progress more accurately as you work on your marketing plan for coming year.

As you're looking at these numbers, do any of them surprise you? Are you pleased with your list growth, but disappointed with your Facebook reach? Did you sell more of that ebook than you thought you would, or earn less in affiliate commissions than you expected?

For each item that surprises you in some way, ask yourself what you could have done differently, or what may have caused the difference. These answers will help you set more realistic goals for the coming year.

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Exercise: Record Your Year-End Stats

Area/Stats	Goal	Actual	Notes
Overall Sales			
Product A Sales			
Product B Sales			
Product C Sales			
Affiliate \$\$ Earned			
Mailing List			
Website Traffic			
Facebook Page Likes			
Twitter Followers			
LinkedIn Followers			
Other			

Set Your Goals

For a business owner, setting goals is the first step toward sustained growth. After all, if you set out on a road trip with no destination in mind, how will you know when you've arrived? Sure, the journey might be fun, but when you're growing a business, that's not your first concern.

When you're setting your goals, it's a good idea to keep the S.M.A.R.T. goal setting model in mind. SMART goals are:

- **Specific:** It's not enough to say that you want more sales. Instead, your goal should be "I want to increase my sales by 10%" or "I want to earn \$250,000 in the next 12 months." Those are both very specific goals that leave no room for ambiguity.
- **Measurable:** You may have heard the quote "What gets measured gets managed," and nowhere is that more true than in business goal setting. Your goals must have some kind of measurement attached to them – either in dollars, subscribers, followers, or another countable figure.
- **Attainable:** It's great to dream about doubling or tripling your income, but unless you have a solid plan, you might just find yourself discouraged at the end of the year if your goals are not truly attainable. As you create your goals, ask yourself if it really is attainable or not.
- **Realistic:** In order for a goal to be realistic, you have to have the skills to pull it off. For example, you might set a goal to win the Mr. Universe competition, but if you're a 45-year-old man who's never lifted more than a cup of coffee, it's unrealistic to expect to reach this goal.
- **Time-based:** Good goals have a hard deadline. After all, if you have the rest of your life to add 100 subscribers to your email list, what incentive do you have for working on it today?

With all the talk about SMART goals, though, don't take it too far. In fact, there is one school of thought that says you should toss out "attainable" and "realistic" all together, and instead stretch yourself beyond what you think is possible.

In the end, only you will know what goals you are comfortable with, but do keep in mind that if they are too easy to reach, you may find yourself unmotivated—or even bored—in your business.

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Exercise: Set Your Goals for the Year

Area/Stats	Goal	Actual	Notes
Overall Sales			
Product A Sales			
Product B Sales			
Product C Sales			
Affiliate \$\$ Earned			
Mailing List			
Website Traffic			
Facebook Page Likes			
Twitter Followers			
LinkedIn Followers			
Other			

The Big Picture: Holidays and Special Events

Now that you know where you've been and where you'd like to go in the future, it's time to begin building your plan to get there. First up, we want to look at the big picture.

Every business and marketing plan operates on the same calendar, and smart business owners hitch promotions and products to holidays and other events throughout the year.

You've no doubt purchased many special deals, which were offered only on Black Friday or Cyber Monday, for example, but there are many others to consider as well.

Dating coaches often create special offers just in time for Christmas or Valentine's Day, since those are the times that single people tend to feel the desire for a date. Business coaches might find success with a goal-setting program just in time for January. And home-school advocates will undoubtedly find themselves busier come late summer.

Don't just stick to the obvious, though. Surprise your market with the unexpected, and you might just see a surge in sales you didn't expect. For example, health coaches might encourage their clients to start a workout routine when Daylight Saving time ends in the fall to "take advantage of that extra hour." Business coaches may consider offering a business kick-start package just in time for Independence Day. Or what about "Chaos Never Dies Day"? That's the perfect time for savvy virtual assistants to offer a great deal on chaos-killing packages to overwhelmed entrepreneurs.

So grab a yearly calendar and begin to fill in the big picture events and holidays that can be used as timely promotions in your business.

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Exercise: Fill in Your Calendar with Big Picture Holidays and Events

Month	Holidays	Other Events (travel, conferences, etc.)
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

Plan Your Products and Programs

Now that you've seen the big picture, it's time to start filling in your marketing calendar with your products and promotions. And the first step to doing that is to take inventory of what you already have.

Include everything that is:

- Complete and ready to sell (and which maybe has been selling previously)
- Partially done
- Still in the planning stages

Exercise: Take Inventory

Product/Program	Status (complete/incomplete/etc.)	Notes

Next, take a look at the calendar you created. Which products are a good fit for each month or season? Don't worry just yet if the products are finished—we'll work on that in a later section—for right now, we're only interested in what promotions you can plan for the upcoming year.

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Exercise: Schedule Your Promotions

Month	Product/Program to Promote
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Complementary Products to Promote

Got a few holes in your schedule? That's not surprising. In fact, it would be a rare thing for your products alone to completely fill your marketing calendar. Not only would it make for a very busy year for you, but it would also exhaust your list. After all, no matter how loyal your fans, they need input from others as well.

So consider your colleagues and even competitors. What products do they offer that you can use to fill in your calendar? What events (telesummits, workshops, or conferences) can you share with your audience?

Many business owners (like you!) plan their promotions months in advance, so reach out to those you admire and respect and ask if they have a marketing calendar to share. Even if they don't, a quick search of your email archives will probably reveal the general timing of big promotions, such as Marie Forleo's B-School and Michael Hyatt's Platform University.

Fill in the blank spots in your calendar with upcoming promotions and launches that your market needs to know about. Remember, the ultimate goal is to provide the very best information and resources to your audience, so don't be afraid to say, "This program [from another seller] is a great deal for you."

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Exercise: Schedule Complementary Promotions

Month	Product/Program to Promote
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Your Next Six Weeks

Now that you've got your annual calendar filled in, it's easy to look at that and become overwhelmed.

Keep in mind, though, that you don't have to tackle everything at once. In fact, you'll be much more successful if you focus only on the next few weeks. You'll keep the big picture in mind, but when it comes to where you spend your time, you'll only be worrying about what's coming up in the next 45 days.

This gives you plenty of time to finish up any product that's not quite ready for sale, plan a launch, and get all the content in place that you'll need. You'll even have time to plan free webinars and other promotional events, if you like.

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Exercise: Plan Your Marketing

Week/Date	Primary Task (launch, tease, etc.)	To-Do
Week 1 Dates: _____	<ul style="list-style-type: none"> <input type="checkbox"/> <i>Email Mon/Wed/Fri</i> <input type="checkbox"/> <i>B-School Review</i> <input type="checkbox"/> <i>Open cart for new sales</i> <input type="checkbox"/> <i>Beef up YouTube channel</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> <i>Schedule Emails</i> <input type="checkbox"/> <i>Finish Product</i> <input type="checkbox"/> <i>Edit Videos</i> <input type="checkbox"/> <i>Reach out to affiliates</i> <input type="checkbox"/> <i>Create Facebook Ads</i>
Week 2 Dates: _____		
Week 3 Dates: _____		
Week 4 Dates: _____		
Week 5 Dates: _____		
Week 6 Dates: _____		

You Can't Do It All

Still feeling overwhelmed? Even the most well-planned and organized marketing calendar won't get the work done for you. There are still:

- Videos to record
- eBooks to write
- Blog posts to create
- Emails to send
- Podcasts to edit

The list goes on and on—and that doesn't even include the behind-the-scenes work such as customer service, shopping cart maintenance, project management and all the other things no one notices until they break.

If you truly want to create a 12-month cash calendar, then now is the time to hand off those tasks you don't want to or cannot do. Using your 6-week task list, make a new list that includes only the tasks you must do. These might include things such as writing your emails, recording videos and podcasts, and intake calls for new clients.

The rest can—and should—be outsourced.

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Exercise: Schedule the Team

Task	Outsourced To (name)	Due On (date)

Tip: Not sure who to outsource to? [*Pick up Melissa Ingold's Fab Contractors List*](#) to see who she personally uses and recommends for everything from content creation to graphic design.

Keep the Momentum Going With Regular Reviews

Even the most well planned marketing calendar won't produce results without ongoing care and feeding. Schedule time each week to:

- Review tasks assigned to your team
- Review tasks assigned to you (consider hiring a project manager if you're bad at personal accountability)
- Review current promotions from your colleagues, contemporaries, and competitors: Do any of these fit with your existing calendar?
- Look ahead to the next few weeks to spot the holes in your schedule

In addition, you'll want to do a more thorough review each month, which will include:

- Your next 6-weeks of planning
- Scheduling time to update/create products and programs
- Review your long-term calendar for changes and updates
- Review new technology related to your market: Do you need to move things in your calendar to accommodate that hot new social network?

Remember, your plan is a living document. It's not written in stone. You can (and should) rearrange it to fit your current needs, new offers from others, and in answer to feedback and suggestions you receive from your market.