

Local Media Solutions

Your Small Business Marketing Deep-Dive & Action Plan Worksheet

This worksheet is designed to help you reflect on your business, uncover opportunities, and build a practical plan for growth. Use it as a guide to think deeply about your goals, your customers, and your future—even if you never hire a marketing agency.

Created by Local Media Solutions LLC

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Business Identity & Purpose

- What is your business's mission in one sentence?
- Why did you start this business, and what problem are you solving for your customers?
- What makes your business unique in your market?
- What 3 words would you want customers to use to describe your business?

Current Marketing Reality Check

- How do new customers usually find you today? (circle: word-of-mouth, social media, Google search, walk-ins, other)
- Which of your current marketing efforts are working best? Which are not working at all?
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- On a scale of 1–10, how confident are you that people in your community know your business exists?

Goals & Growth Vision

- What does success look like for your business in the next 12 months?
- List 2–3 key marketing goals for the year.
- What would doubling your customer base mean for your business? (more staff, more products, bigger space, etc.)
- If money wasn't an issue, how would you market your business differently?

Target Market (Your People)

- Define your ideal customers (industries, demographics, needs).
- Who is your best customer today? What do they value most about your product/service?
- What problems do they have that you solve better than anyone else?
- Are there other groups who could benefit from your business but don't know about you yet?

Competition & Differentiation

- List 2–3 businesses you compete with. What are they doing better than you?
- What do you offer that makes customers choose you instead?
- What would your business look like if you didn't market at all?

Marketing Initiatives & Channels

- Outline 2–3 initiatives you'll pursue this year.
- Identify the platforms and strategies you'll use (website, social media, streaming ads, events, etc.).
- Which channels are you currently using? Which should you be using?
- How do you connect with your customers after they buy (email, social media, events)?

Budget & Priorities

- Allocate estimated costs to each initiative.
- How much are you willing to invest each month in growing your business?
- If you had to cut all but one marketing effort, which one would you keep and why?

- Which is more important: reaching new customers or keeping current ones engaged?

Action Plan & Timeline

- What is one marketing step you can take this week?
- What is one bigger project you can commit to this quarter?
- Plan initiatives quarterly or monthly (Q1–Q4).
- Who will hold you accountable to follow through?

Final Reflections

- What did you learn about your business from this worksheet?
- What surprised you the most?
- What one thing do you want to change starting today?

Need Help Putting This Into Action?

Local Media Solutions can guide you step by step to turn this worksheet into a real strategy that grows your business. Contact us today for a free consultation.