

WTG Monthly Marketing Worksheet

Month: _____

Goals for this Month

Target Date Done

- | | | |
|----------|-------|--------------------------|
| 1. _____ | _____ | <input type="checkbox"/> |
| 2. _____ | _____ | <input type="checkbox"/> |
| 3. _____ | _____ | <input type="checkbox"/> |
| 4. _____ | _____ | <input type="checkbox"/> |
| 5. _____ | _____ | <input type="checkbox"/> |

Strategies for this Month

- | | | | | |
|-------------------------------------|------------------------------------|---|--------------------------------------|--|
| <input type="checkbox"/> Networking | <input type="checkbox"/> Referrals | <input type="checkbox"/> Keeping in Touch | <input type="checkbox"/> Online | <input type="checkbox"/> Joint Venture |
| <input type="checkbox"/> Writing | <input type="checkbox"/> Speaking | <input type="checkbox"/> Promotions/PR | <input type="checkbox"/> Advertising | <input type="checkbox"/> Social Media |

Tactics for Attracting More New Clients this Month

Target Date Done

- | | | |
|-----------|-------|--------------------------|
| 1. _____ | _____ | <input type="checkbox"/> |
| 2. _____ | _____ | <input type="checkbox"/> |
| 3. _____ | _____ | <input type="checkbox"/> |
| 4. _____ | _____ | <input type="checkbox"/> |
| 5. _____ | _____ | <input type="checkbox"/> |
| 6. _____ | _____ | <input type="checkbox"/> |
| 7. _____ | _____ | <input type="checkbox"/> |
| 8. _____ | _____ | <input type="checkbox"/> |
| 9. _____ | _____ | <input type="checkbox"/> |
| 10. _____ | _____ | <input type="checkbox"/> |

Tactics for Establishing More Credibility/Expertise this Month

Target Date Done

- | | | |
|----------|-------|--------------------------|
| 1. _____ | _____ | <input type="checkbox"/> |
| 2. _____ | _____ | <input type="checkbox"/> |
| 3. _____ | _____ | <input type="checkbox"/> |
| 4. _____ | _____ | <input type="checkbox"/> |
| 5. _____ | _____ | <input type="checkbox"/> |

Tactics for Closing More Business this Month

Target Date Done

- | | | |
|----------|-------|--------------------------|
| 1. _____ | _____ | <input type="checkbox"/> |
| 2. _____ | _____ | <input type="checkbox"/> |
| 3. _____ | _____ | <input type="checkbox"/> |
| 4. _____ | _____ | <input type="checkbox"/> |
| 5. _____ | _____ | <input type="checkbox"/> |

My Reward for Achieving My Goals: _____