



## Annual Planning Worksheet

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Presented in Tandem With Business as “Un”Usual



## What's Working?

What's contributing to our business's success?

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Which campaigns and channels are generating our most sales qualified leads?

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Which of our products or services are generating the most consistent revenue?

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Which of our processes or technologies are most helpful?

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## What Opportunities and Concerns Are Keeping Us Up at Night?

What are our people most excited to make happen in the next year?

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Which factors are going to have the biggest impact  
on our business and our industry in the next year?

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What are the internal and external barriers that  
we're worried will prevent our company's growth?

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## What's Changed in the Marketplace?

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Which new competitors, products, services, or technologies should we keep our eyes on over the next year?

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What are our competitors doing differently that we wish we did first?

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What do our customers and prospects tell us matters most to them?

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## How Are We Most Likely to Reach Our Audience?

How can we better understand what motivates our customers and how they move through their buying process?

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Which of our buyer personas are up-to-date and which need to be revisited or created from scratch?

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Which of our marketing communications channels have the highest and lowest engagement rates?

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Which channels should we prioritize for the next year based on our available resources?

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## What's the Best way to Build a Long-term Plan for Reaching our Target Audience?

Which always relevant cornerstone topics should we build our marketing around for the next year?

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Who is our audience? What buying decision do we want to help them make?  
What outcome do we expect?

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What questions should our customers be asking as they think about about our cornerstone topics?

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Which assets do we already have that address these questions and which can we not currently answer?

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## What Defines Our Success?

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What are the most important metrics we're measuring on a regular basis?

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How can we qualify improvements that we can't easily measure?

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## Who Should Participate in the Annual Planning Process?

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### Vision Setting - Short /Long-Term Growth Plan

Senior Leadership/Executive Team

### Grow-to-market Campaign and Channel Planning

Strategists/Market Research Team

Sales Leaders

Marketing Leaders

Human Resources

Web Ops Team

### Plan Execution

Account Leaders

Marketing Team

Web Ops Team

Human Resources

### Plan Performance - Quarterly/Bi-Annual Business Reviews

C-Suite

Account Leader

Sales Leader

Human Resources

Marketing

Web Ops

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