



Setting Your Business Up for Success in 2026

Marketing Checklist & Planning Worksheet

Use this worksheet alongside the blog post to design a realistic, repeatable marketing plan for 2026. Work through each section, write your answers, and keep this nearby when you plan.

1. Look back before you plan forward

Top 3 marketing wins from 2025:

1. _____
2. _____
3. _____

3 things that drained you or flopped:

1. _____
2. _____
3. _____

Win to double down on in 2026:

Thing you will not repeat in 2026:

2. Map your real busy and slow seasons

Busy months in 2026 (circle or list):

Slow months in 2026 (circle or list):

Which month will be your main 'marketing setup' month each quarter?

Q1: _____ Q2: _____

Q3: _____ Q4: _____



3. Clean up your offers

List your main offers (services, packages, products):

1. _____
2. _____
3. _____
4. _____

Which offers sold well in 2025?

Which offers did not sell or you no longer want to deliver?

For each main offer, write a 1–2 sentence description in plain language:

4. Trace your customer path

Top 2 ways people currently discover you:

1. _____
2. _____

How do they usually contact you (DM, email, form, etc.):



How do they usually book or pay:

Where do people tend to stall or ghost?

5. Choose your main channels on purpose

Primary marketing channel for 2026 (where you show up most consistently):

Support channel (backs up your primary channel):

What does 'consistent' realistically mean for you?

(Example: 2 posts per week, 1 email every other week)

6. Set simple content themes

Content themes you want to be known for in 2026 (3–4):

Theme 1: _____

Theme 2: _____

Theme 3: _____

Theme 4: _____

Ideas under each theme (brain dump a few):



7. Decide how you will measure progress

Lead metric (inquiries, discovery calls, etc.):

Money metric (invoices, revenue, etc.):

Retention metric (repeat clients, referrals, etc.):

Gentle targets for Q1 (example: 5 inquiries/month):

8. Decide what you will stop doing

Marketing tasks you avoid, resent, or that no longer work:

1.

2.

3.

Decision for each (stop, reduce, or delegate):

9. Decide where you need help

Tasks only you can do (voice, final decisions, etc.):



Tasks someone else could own (posting, graphics, reporting, etc.):

What kind of support do you need most in 2026?

(Coaching, done-with-you planning, done-for-you marketing, etc.)

10. Build a simple quarterly check-in

Quarterly check-in dates for 2026:

Q1: _____ Q2: _____

Q3: _____ Q4: _____

At each check-in, note:

What is working:

What is not working:

What you will adjust for the next quarter:

Reminder: Your 2026 marketing does not have to be perfect.

It needs to be realistic, repeatable, and aligned with your actual life.