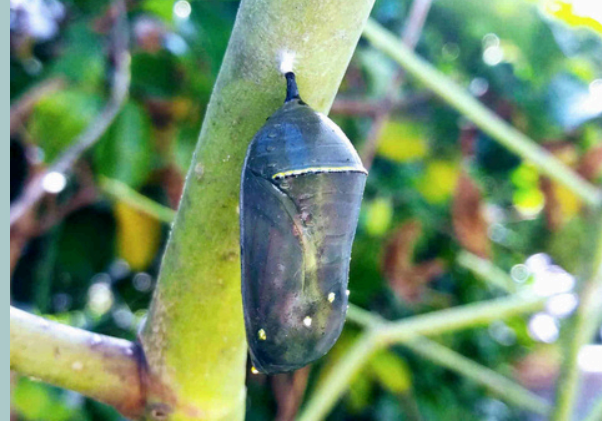




Marketing Planner

SMB YEAR-ROUND



Content:

1. Foreword

2. Year Planning Overview

Seasonal opportunities

Business cycles

Promotions you'll run

Ideal touch point

2.a. Winter - January, February, March

2.b. Spring - April, May, June

2.c. Summer - July, August, September

2.d. Autumn - October, November, December

3. Essential Marketing Foundation

4. Seasonal Checklist

4.a. Winter - Spring

4.b. Summer - Autumn

5. Touch point Ideas

5.a. Offline Touchpoints

5.b. Online Touchpoints

5.c. Customer Relationship Touchpoints

6. Planning Prompts

Foreword

HOW TO USE THIS MARKETING PLANNER



This planner is designed to help small businesses think clearly about marketing across the year – season by season, not all at once.

Use it to:

- step back from day-to-day activity
- identify seasonal opportunities and priorities
- plan meaningful touchpoints with your audience
- reflect before committing time or budget

You can work through the pages in order or jump to the sections most relevant to you. The planner can be used digitally or printed and completed by hand.

For ongoing planning, updates, and adjustments throughout the year, this planner is also available as a **Google Sheet working version**. The Sheet is designed for copying, adapting, and revisiting as your plans evolve.

There is no “right” way to complete this planner.
Use what’s useful, ignore what isn’t, and focus on clarity over perfection.

Wishing you clarity and confidence as you grow your small business.

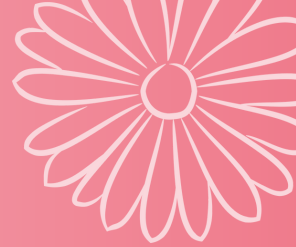
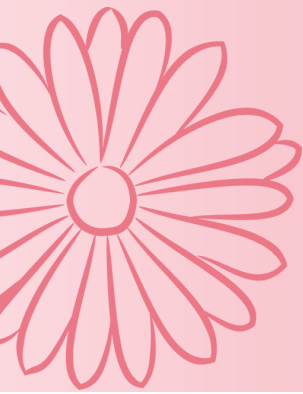
The KBM D3signs Team

If you’re looking for practical marketing tools, templates, or branded items, you’re welcome to browse the [CocoonIt store on Zazzle](#).



Winter

Planning Overview	January	February	March
Seasonal opportunities: “List key dates, holidays, weather changes, community events.”			
Business cycles: “Busy times, slow periods, recurring client needs.”			
Promotions you’ll run: “Discounts, reminders, service bundles, launches.”			
Ideal touch point: “Calendar? Door hanger? Postcard? Email? Social?”			



Spring

Planning Overview	April	May	June
Seasonal opportunities: “List key dates, holidays, weather changes, community events.”			
Business cycles: “Busy times, slow periods, recurring client needs.”			
Promotions you’ll run: “Discounts, reminders, service bundles, launches.”			
Ideal touch point: “Calendar? Door hanger? Postcard? Email? Social?”			



Summer



Planning Overview	July	August	September
Seasonal opportunities: “List key dates, holidays, weather changes, community events.”			
Business cycles: “Busy times, slow periods, recurring client needs.”			
Promotions you’ll run: “Discounts, reminders, service bundles, launches.”			
Ideal touch point: “Calendar? Door hanger? Postcard? Email? Social?”			

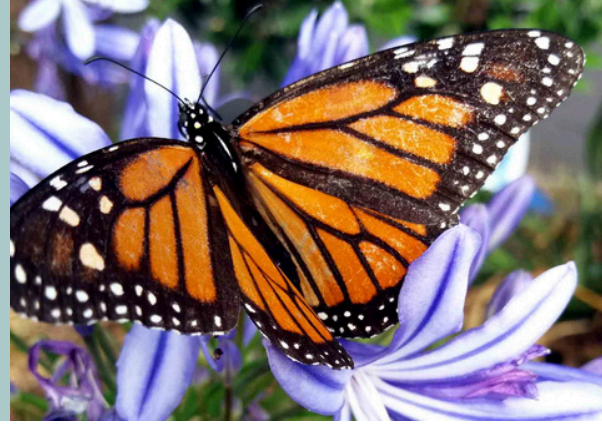


Autumn

Planning Overview	October	November	December
Seasonal opportunities: “List key dates, holidays, weather changes, community events.”			
Business cycles: “Busy times, slow periods, recurring client needs.”			
Promotions you’ll run: “Discounts, reminders, service bundles, launches.”			
Ideal touch point: “Calendar? Door hanger? Postcard? Email? Social?”			

Essential Marketing

FOUNDATION



Brand Colors

Primary:

#

RGB:

CMYK:

#

RGB:

CMYK:

#

RGB:

CMYK:

Secondary:

#

RGB:

CMYK:

#

RGB:

CMYK:

#

RGB:

CMYK:

Fonts:

Main (title, body):

Accent:

Logo

Pictogram

Wordmark logo

Initials

Black

White

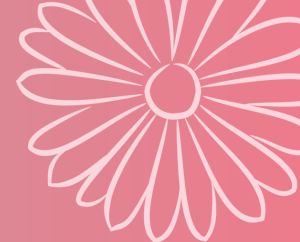
Tone of voice

Updated business details

Social media handle

Website URL

Contact details



Seasonal Checklist

WINTER - SPRING



Winter January, February & March



Holiday appreciation gifts



Schedule January reminders



Post-holiday recovery offers



Promote services clients neglect in cold months



Spring April, May & June



Seasonal: Clean, Prep the Lawn, Renew Services



Promote "start of season" services



Share maintenance tips



Schedule reminders





Seasonal Checklist

SUMMER - AUTUMN



Summer July, August & September

☐

Promote outdoor or travel-related services

☐

Prep for back-to-school rush

☐

Engage with local events

☐

Mid-year check-in offers

☐

Autumn October, November & December

☐

Pre-holiday service prepping

☐

"Last chance before winter" messaging

☐

Loyalty or renewal incentives

☐

Launch year-end promotions

☐

Strategic Touchpoints

OFFLINE OPTIONS



<input type="checkbox"/>	Calendar magnets	
<input type="checkbox"/>	Door hangers	
<input type="checkbox"/>	Flyers during peak seasonal demand	
<input type="checkbox"/>	In-store counters	
<input type="checkbox"/>	Mid-year check-in offers	
<input type="checkbox"/>	Package inserts	
<input type="checkbox"/>	Appointment cards	
<input type="checkbox"/>	Referral cards	
<input type="checkbox"/>	Loyalty cards	
<input type="checkbox"/>	Loyalty or renewal incentives	
<input type="checkbox"/>		
<input type="checkbox"/>		

Strategic Touchpoints

ONLINE OPTIONS



<input type="checkbox"/>	Monthly reminders	
<input type="checkbox"/>	Quick seasonal tips	
<input type="checkbox"/>	Before/after images	
<input type="checkbox"/>	Testimonials	
<input type="checkbox"/>	Seasonal promotions	
<input type="checkbox"/>	Local hashtags and event mentions	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Strategic Touchpoints

CLIENT RELATIONSHIP TOUCHPOINTS



<input type="checkbox"/>	Thank-you messages	
<input type="checkbox"/>	Anniversary of service	
<input type="checkbox"/>	Reminder of expiring services	
<input type="checkbox"/>	"We missed you" win-back prompts	
<input type="checkbox"/>	Acknowledging client milestones or achievements	
<input type="checkbox"/>	Seasonal or holiday greetings	
<input type="checkbox"/>	Birthday message (where appropriate and consented)	
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Planning Prompts

FOR SMALL BUSINESSES



<input type="checkbox"/>	Who are your top 3 customer types this year?	
<input type="checkbox"/>	What are their biggest seasonal needs?	
<input type="checkbox"/>	Which 3 months are most profitable?	
<input type="checkbox"/>	Which 2 months are slow — and need special attention?	
<input type="checkbox"/>	What 3 recurring promotions can anchor your year?	
<input type="checkbox"/>	What touchpoint works best for your business? (Calendar / Doorhanger / Reminder message / Referral card)	
<input type="checkbox"/>	Which touchpoints feel authentic to your business and clients?	
<input type="checkbox"/>		
<input type="checkbox"/>		