



MARKETING PLAN WORKSHEETS

Smart Goals

Setting realistic and achievable outcomes.

My goal is:

S
SPECIFIC

What do I want to happen?

M
MEASURABLE

How will I know when I have achieved my goal?

A
ATTAINABLE

Is the goal realistic and how will I accomplish it?

R
RELEVANT

Why is my goal important to me?

T
TIMELY

What is my deadline for this goal?

BRAND ARCHETYPES

Brand archetypes are a set of universally recognized symbols and themes derived from the works of psychologist Carl Jung. These archetypes represent inherent traits, behaviors, and characteristics that are deeply embedded in the collective unconscious of humanity. In the context of branding and marketing, brand archetypes are used to define and personify a brand's character, values, and purpose in a way that resonates with consumers on an emotional and psychological level.

- **The Innocent** craves safety and looks at things from a glass half full.
 - Does your brand promote simplicity, purity, and honesty?
 - Is your brand associated with nostalgia or a return to simpler times?
- **The Sage** craves understanding. For them, the pursuit of knowledge is the priority. Education-focused companies, like Coursera and Discovery, typically exhibit this archetype.
 - Is your brand wise, knowledgeable, and a source of guidance?
 - Does your brand value truth, insight, and enlightenment?
- **The Explorer** craves freedom. With this archetype, it's all about what's daring and exciting. Think of outdoor and adventure brands.
 - Does your brand value freedom, discovery, and adventure?
 - Is your brand associated with the great outdoors or the unknown?
- **The Outlaw** craves liberation. They believe in the saying, "Rules are made to be broken." The main themes for this archetype are rebellion and disruption.
 - Does your brand challenge the status quo or rebel against established norms?
 - Is your brand edgy, disruptive, or unconventional?
- **The Magician** craves power. They're dreamers who believe anything can happen. You'll also find this often in entertainment brands as well as beauty.
 - Does your brand promise transformational experiences or results?
 - Is your brand associated with mystery, enchantment, or the supernatural?
- **The Hero** craves mastery. They don't back down from a challenge and display courage, honesty, and bravery – a common archetype in sportswear brands.
 - Does your brand aim to solve major problems or overcome challenges?
 - Is your brand associated with courage, boldness, and determination?

BRAND ARCHETYPES

- **The Lover** craves intimacy and focuses heavily on the senses. Popular lover archetypes are found in indulgent brands like chocolate, wine, fragrance, and cosmetics.
 - Is your brand passionate, sensual, or associated with romance?
 - Does your brand value intimacy, pleasure, and close relationships?
- **The Jester** craves enjoyment. They bring the fun to the party every time, and they're not afraid of a little mischief.
 - Is your brand fun, playful, and light-hearted?
 - Does your brand value humor, joy, and entertainment?
- **The Everyman** craves belonging. They are warm, friendly, and humble. This is perhaps the most flexible archetype and you can see it in a variety of industries.
 - Is your brand down-to-earth and relatable to the average person?
 - Does your brand value community, belonging, and equality?
- **The Caregiver** craves service. The main theme of this archetype is altruism. Nonprofit and sustainability brands depict this archetype often.
 - Is your brand nurturing, protective, and compassionate?
 - Does your brand aim to help, care for, or serve others?
- **The Ruler** craves control. They value organization, power, and status. You'll often notice this archetype in luxury vehicle brands.
 - Does your brand exude authority, leadership, and stability?
 - Is your brand associated with luxury, exclusivity, or dominance in its field?
- **The Creator** craves innovation. They're bold, creative, and aren't afraid to try new things. Technology brands like Apple and Adobe are perfect examples of this archetype.
 - Is your brand innovative, imaginative, and artistic?
 - Does your brand aim to create lasting value or legacy?

Why Businesses Should Figure Out Their Archetype

Emotional Connection: By aligning with a specific archetype, brands can tap into deep-rooted emotions and values that consumers inherently understand and connect with. This emotional connection can lead to stronger brand loyalty and trust.

Differentiation: In a saturated market, brands often struggle to stand out. By identifying and embracing a specific archetype, brands can differentiate themselves from competitors and carve out a unique market position.

Consistent Messaging: Understanding the brand's archetype provides a clear framework for all brand communications, ensuring consistency across all marketing channels. This consistency reinforces brand identity and makes the brand more recognizable to consumers.

Guided Decision Making: When a brand is aware of its archetype, it can make more informed decisions about product development, advertising campaigns, and customer engagement strategies that align with its core values and personality.

Authenticity: Consumers today value authenticity. By understanding and staying true to their archetype, brands can present themselves in a genuine and authentic manner, leading to increased trust and credibility.

Storytelling: Archetypes provide a foundation for compelling storytelling. Brands can craft narratives around their archetype, making their content more engaging and relatable to their target audience.

Cultural Resonance: Since archetypes are universal, they resonate across cultures and demographics. Brands that leverage archetypes can appeal to a broader audience and have a global reach.

How to Define and Create Your Brand Archetype

1. Identify Your Brand Mission & Values

Begin by looking at what your brand stands for and what it aims to achieve. Your values and mission form the core of your brand, and your archetype should be an extension of these. For example, if your brand values innovation and creativity, the Creator archetype can be an ideal fit. If safety and care are your brand's main goals, then the Caregiver can align better.

2. Understand Your Target Audience

Who are your customers and what do they care about? Understanding your target audience can help you select an archetype that resonates with them. Conduct market research to learn about your customers' needs, wants and expectations. This will also help you understand what kind of story your audience is likely to connect with.

3. Build On Emotion

Once you've identified your brand values and mission and understood your audience, think about the emotional response you want your brand to evoke. For example, if you have identified the explorer archetype, your goal should evoke feelings of freedom and adventure.

4. Ensure Consistency Across All Touchpoints

Once you've defined your brand archetype, ensure that all your branding elements, such as logos, color schemes, taglines and your marketing efforts (think social media posts and marketing campaigns) align with it. This creates a consistent brand experience that makes your brand more memorable.

Brand Archetype Worksheets

Part 1: Archetype Identification

For each archetype, rate how strongly it resonates with your brand on a scale of 1 to 5 (1 being "Not at All" and 5 being "Strongly Resonates").

Archetype Rating (1-5) Key Traits & Characteristics

The Innocent	Simplicity, purity, honesty.	Rating: _____
The Everyman	Relatability, community	Rating: _____
The Hero	Courage, determination	Rating: _____
The Outlaw	Rebellion, disruption	Rating: _____
The Explorer	Freedom, adventure	Rating: _____
The Creator	Innovation, imagination	Rating: _____
The Ruler	Authority, leadership	Rating: _____
The Magician	Transformation, mystery	Rating: _____
The Lover	Passion, intimacy	Rating: _____
The Caregiver	Nurturing, compassion	Rating: _____
The Jester	Fun, playfulness	Rating: _____
The Sage	Wisdom, knowledge	Rating: _____

Part 2: Reflection Questions

Which archetype(s) received the highest rating?

Answer: _____

Why do you believe this/these archetype(s) resonate most with your brand?

Answer:

How do you envision this archetype guiding your future branding and marketing decisions?

Answer:

Part 3: Justification

Based on your reflections and the ratings above, identify the primary archetype for your brand.

Primary Brand Archetype: _____

Justification:

Explain why you've chosen this archetype as the primary one for your brand. Consider its relevance to your brand's mission, values, target audience, and overall brand narrative.

Answer:



Buyer Persona

Basic Demographics

Age

Income

Gender

Family Information

Their wants and aspirations

What they really think or feel

Their fears, frustrations, pains, and urgencies

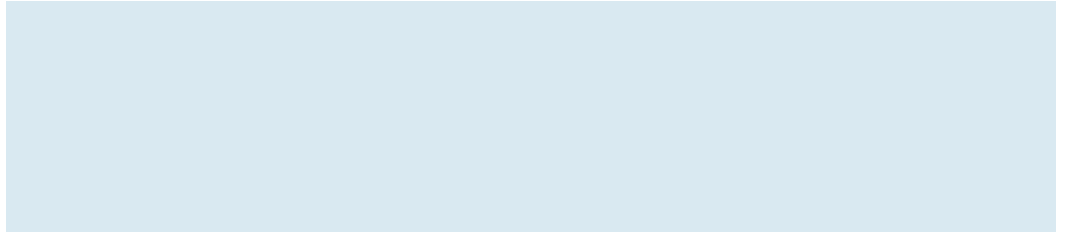
(What are their biggest problems?)

Your ideal customer is...

COMPETITION TRACKER

COMPETITOR -

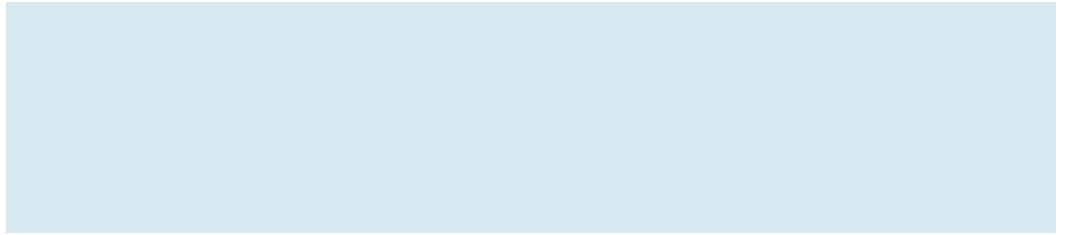
COMPETITOR EDGE -



WEBSITE -

COMPETITOR -

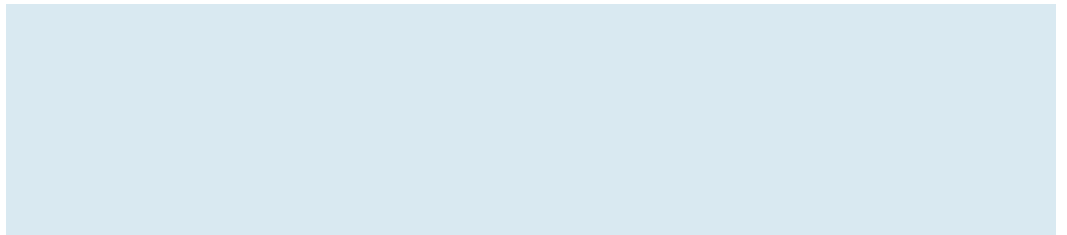
COMPETITOR EDGE -



WEBSITE -

COMPETITOR -

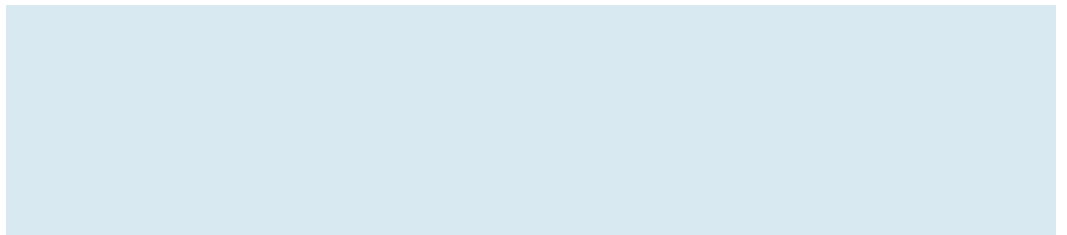
COMPETITOR EDGE -



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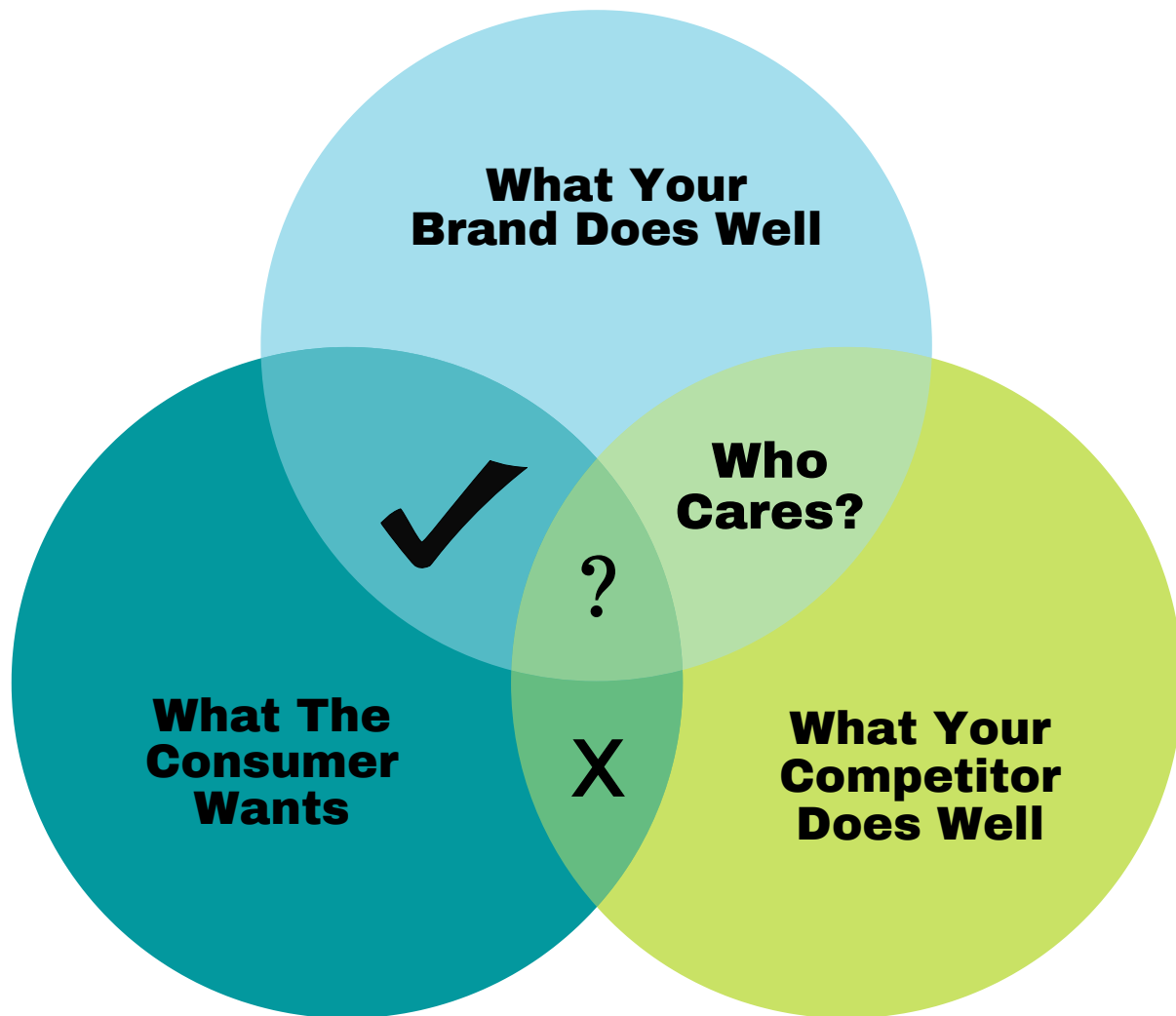
COMPETITOR -

COMPETITOR EDGE -



WEBSITE -

Unique Selling Proposition



Winning Zone-When you have exactly what your customer wants



Losing Zone-When your competitor does it better than you!



Risky Zone-No clear advantage over competitors-stand out!

Who Cares?

If the consumer doesn't want it-who cares!

The unique selling proposition is how your product or service is better than what else is available on the market. It's a way to differentiate yourself from the competition. Come up with one that is assertive but defensible, and focus on the value it provides your customers. It's more than just a pithy slogan.

Unique Selling Proposition Exercise

Brand Purpose

Why Was Your Brand Created?

Brand Core Values

Name Your Top 3 Core Values:

- 1.
- 2.
- 3.

How Will Your Brand Live Up To Them?

Goals and Needs

What goals does your buyer have?

What needs do they seek to meet?

Problems and Painpoints

What problems does your buyer face?

What pain points do they have?

How Your Brand Fits In

How does your brand solve these problems or pain points?

Brand Mission and Vision

Brand Mission

What are your current goals?

What needs does your brand meet for your target audience?

Brand Vision

What future does your brand want to create and why?

How does your brand plan to make it better for your target audience?

Value Proposition

How does your brand solve the audience's problems better than the competition?

Brand Position

What characteristics and emotions do you want people to associate with your brand?
How does this position set you apart from the competition?

Voice and Tone

How does your brand speak to its audience?

My Unique Selling Proposition is:

GET TO THE HAND RAISE!

How do you tell someone about your business? Does it get them to raise their hand and say "yes, that's me" or "yes, I want that!"? If not, spend time here writing out your perfect pitch! What problem do you solve with your product or service? What pain are you taking away from your customer? Who exactly do you help?

