



Inbound Marketing Goal Planning Worksheet for Businesses

What job do you need your inbound marketing to do? In order to attract the right visitors to your website (where most of your inbound marketing will play out), you must select a purpose for your marketing efforts.

Setting your goals

What do you want to achieve with your inbound marketing efforts? What do you hope your targeted visitors will do? Consider your answers to these questions to get started:

1. What marketing challenges does my company need to solve?
2. What do I hope the outcome of this effort will be?
3. What are the risks/outcomes if these efforts don't work?
4. How will these efforts support our mission and values?
5. Who will need to be involved?
6. What is my budget for achieving this?
7. How long do I have to see success from these efforts?

Documenting SMART goals

As you answer the above questions, you will record these goals using SMART steps. They need to be focused, concrete, and quantifiable goals. SMART is simply an acronym to help you remember how to define your goals. Here are the definitions for SMART goals:

Specific:

What exactly do you want to achieve? Answer specifically, the who (who is involved), what (what must be done), where (location-specific, if it applies), when (the time frame), why (the purpose), and how for your goal. The more specific your description, the more likely you are to achieve it.

Measurable:

Establish how you will quantify your results (traffic, leads, downloads, enrollments, tour requests, etc.). Can you assign a numerical value to these measurements? Or compare where you started, where you are at certain increments, and where you want to be by a given time period. How will you determine if the effort was effective or not?

Attainable (or Agreed Upon):

Create goals that are possible, but it's okay to reach for the stars because even if you don't make the goal, you'll have made progress. Do the effort, time, and costs make the goal worthwhile? If you are working with a team, you might use the word "agreed upon" instead to assure you are all in agreement with the goal and its value.

Relevant:

How does your goal align with your entity's mission? Will it contribute to its overall success? Ask yourself, "What is the objective behind the goal?" and "Will this goal achieve it?" "Will a successful outcome benefit our company, our clients, our brand, or engage our community?"

Time-based:

Set deadlines and plan your days and weeks so you can meet those deadlines. It's okay to be flexible, but commit to the deadlines you set. If there are steps that must be accomplished in a specific order to be effective, include this information as well.

SMART Goal Example:

Goal: Increase our client base

Specific: I will work with Jerry and Meg to develop content specific to the interests of small business owners and high net worth individuals.

Measurable: We will increase our active client base over last year by 3%.

Attainable: Using information from online resources and databases, we will develop informative content to highlight the benefits of our services.

Relevant: In coordination with our social media (if appropriate), website, and communications efforts, all of our messaging will provide an evidence-based commitment to our clients' financial bottom line.

Time-Based: We will have eight months to increase our client base.

SMART Goal: *"We will increase our client base by 3% with a first-year focus on small businesses and high net worth individuals. We will schedule website news articles, social media posts, and targeted marketing content each month, beginning in May and continuing through January."*

The example goal above covers just one selected goal of our firm's fictional inbound marketing priorities. We would also create similar goals for the various stages to implement an inbound marketing strategy like developing personas for each of our

targeted audiences, writing and designing content for mailings, revising the website content, creating and scheduling social media posts, and developing the informational downloads (content gifts) to nurture prospects along the path toward their decision (hopefully, choosing your services).

However you decide to record your goals, be sure to look at each of the areas represented by the acronym, and you will be less likely to miss something important in your planning.

Here are a few SMART goal examples from other blog posts you can use as inspiration:

[Kuno Creative Smart Goal Examples](#)

[HubSpot Smart Goal Examples](#)

Now it's your turn. Use the worksheet below to answer these vital questions, and then apply SMART strategies to your goals. Your goal is to end up with a clear and actionable marketing goal for your company.



My Inbound Marketing Goal

Complete the following questions to develop your primary inbound goals for your business:

1. What marketing challenge does my company/firm need to solve?
2. What do I hope will be the outcome of this effort?
3. What are the risks/outcomes if these efforts don't work?
4. How will these efforts support our company's mission and values?
5. Who will need to be involved?
6. What is my budget for achieving the goal?
7. How long do I have to see success from these efforts?

Reviewing each SMART step above, incorporate them into the details of your goal, and then craft a summary goal in the space below.

- Specific: what are the details (what, by whom, when, and how)?
- Measurable: have you quantified your outcomes and decided how you will measure success?
- Attainable or Agreed Upon: what have those involved agreed upon (tasks), and are the goals attainable? (But don't be afraid to stretch either.)
- Relevant: does this goal align with your company's mission and benefit your clients and team?
- Time-Based: have you attached a time frame to your goal for each required stage?

Now, write your inbound marketing goal:

Repeat this process for each of your inbound marketing goals!