

2025

MSP MARKETING PLANNING WORKBOOK

www.thebusinessgrowers.com



2025 MSP Marketing Planning Workbook

Welcome to your 2025 Marketing Planning Workbook from The Business Growers. Please use this worksheet alongside our 2025 MSP Marketing Plan webinar.

“If you fail to plan, you are planning to fail!” – Benjamin Franklin

No MSP will successfully grow in all the right ways without a plan. Just like your business, your marketing strategy needs to evolve. This workbook will guide you through backing into growth with your growth goals and numbers. Then, we'll create a comprehensive marketing plan specifically for your business.

Section 1: The Numbers: Know Your Goals

[» go.thebusinessgrowers.com/2025-worksheet](https://go.thebusinessgrowers.com/2025-worksheet)

1.1: Goal Setting

Make a copy of the worksheet.

	
Step 1: Revenue & New Customer Target	
2023 Recurring Revenue	\$1,400,000.00
2024 Target Recurring Revenue	\$1,550,000.00
Annual New Revenue Goal	\$150,000.00
MRR Monthly Sales Target	\$1,923.08
What is your average TOTAL MRR value per client?	\$500
How many new clients would be required to hit your monthly goal?	3.85
Step 2: # of leads required to hit target	
What is your average conversion rate from sales call/lead to new client?	10%
# of leads needed per month to hit target	38.46

1.2: Your Current Snapshot

Where are you today:

- ☐ Existing # of clients: _____
- ☐ Average MRR total: _____
- ☐ MRR vs. project % breakdown: _____
- ☐ # of New clients per month: _____
- ☐ Average MRR per client: _____
- ☐ Sales conversion rate _____

1.3: Your Future

What's your future vision (End of 2025):

- ☐ Existing # of clients: _____
- ☐ MRR total: _____
- ☐ MRR vs. project % breakdown: _____
- ☐ # of new clients per month: _____
- ☐ Average MRR per client: _____
- ☐ Sales conversion rate: _____

How many leads per month will you need in 2025 to achieve this according to the worksheet?

Now, the big question is **WHY?** Why is this important to you and your business? What will accomplishing this do for you? Write out your why:

Section 2: Your Marketing Strategy Starts with Knowing Yourself & Your Buyer

Before we dive into marketing tactics, let's ensure your core offering is positioned for success.

2.1: Unique Value Proposition

- Who do you primarily serve?
 -
- What problems do you solve for them?
 -
- What's your specific method or expertise (how do you do it differently)?
 -
- What sets you apart/what makes clients stay with you?
 -

Fill in your unique Value Proposition (UVP)?

I help <target audience> achieve/get <desired outcome> by <your unique approach/skills>, utilizing our <key differentiator>.

How can I take my UVP and immediately implement?

2.2: More detail about your ICP (Ideal Client/Customer Profile):

- Take some time to get crystal clear on who you serve:
 - Title
 - Age
 - Gender
 - Town size
 - Revenue
 - Employees
 - What keeps him/her up at night?
 - What does he/she aspire to be/do?
 - How could what you offer that can change their life entirely?

Section 3: Achieving Service Excellence

3.1: Service Audit

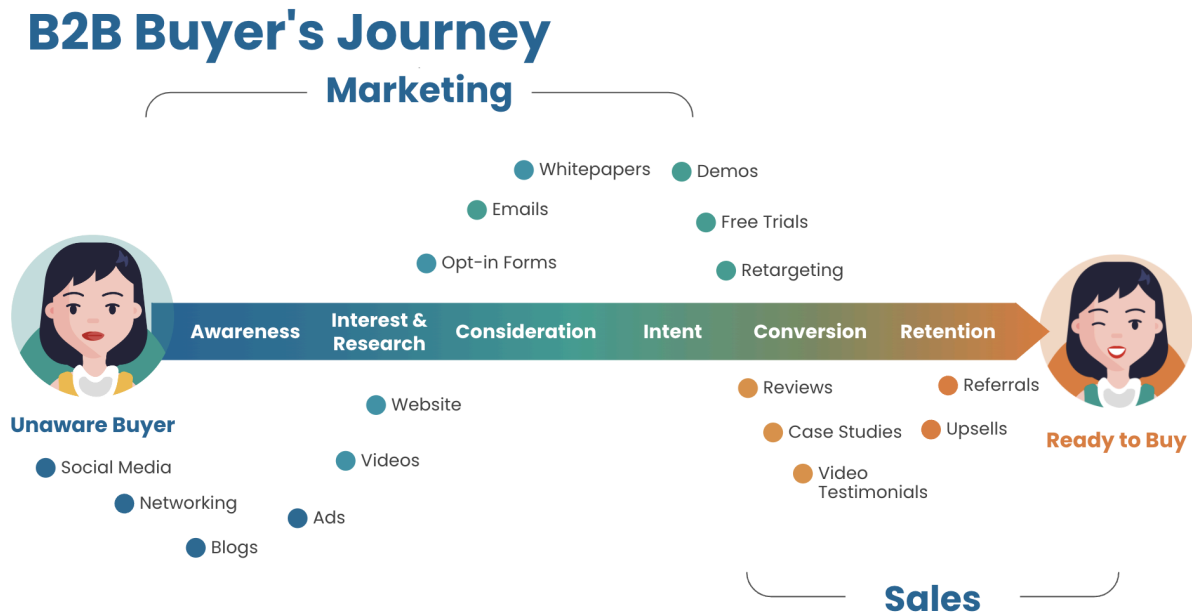
- List your current service offerings:
 - Service 1
 - Service 2
 - Service 3

3.2: Service Gap Analysis

- What services are clients requesting that you don't offer?
 -
 -
- What emerging technologies or services should you integrate by 2025?
 -
 -
- Potential new service offerings in 2025:
 - Service 1
 - Service 2

- Service 3

Section 4: The Three Marketing Focus Areas



Around 3% of B2B buyers are considered “ready to buy” at any given time (the 3% rule).

Goal with marketing: Establish authority and exhibit omnipresence by showing up and answering questions.

4.1: Internal Marketing

Marketing to your existing clients and team.

Checklist:

- ☐ Client Communication Strategy
- ☐ Employee Engagement Programs
- ☐ Referral Systems

- ☐ Cross-Selling/Upselling Processes
- ☐ Client Education Programs

Time to plan. Using the ideas discussed in the webinar, list 3-5 specific initiatives you will commit to in 2025 to improve your internal marketing.

- 1.
- 2.
- 3.
- 4.
- 5.

4.2: External Marketing

Traditional outbound marketing efforts

Checklist:

- ☐ Community involvement
- ☐ Strategic partnerships
- ☐ Speaking engagements
- ☐ Industry events
- ☐ Local business networking

Time to plan. Using the ideas discussed in the webinar, list 3-5 specific initiatives you will commit to in 2025 to improve your traditional outbound marketing.

- 1.
- 2.
- 3.
- 4.

4.3: Digital Marketing

Online presence and digital communications

Checklist:

- ☐ Branding
- ☐ Messaging
- ☐ Website optimization
- ☐ SEO strategy
- ☐ Social media presence
- ☐ Email marketing
- ☐ Content marketing
- ☐ Paid advertising

**Critical Step: The entire webinar dedicated to digital marketing must-haves can be found [here](#). Be sure to watch this while determining these priorities for your MSP business.*

Marketing Action Plan

Internal Marketing

CLIENT COMMS + ENGAGEMENT	EMPLOYEE ENGAGEMENT	REFERRAL SYSTEMS	UPSELLS/ADD-ONS

Traditional Outbound Marketing

COMMUNITY INVOLVEMENT	STRATEGIC PARTNERSHIPS	SPEAKING ENGAGEMENTS	LOCAL BIZ NETWORKING

Digital Marketing

BRANDING/ MESSAGING	WEBSITE/SEO/ GOOGLE MAPS	ORGANIC SOCIAL	PPC

Digital Marketing (Continued)

PAID SOCIAL	EMAIL (Nurture/Cold)	AUTOMATION	TRACKING

What are your TOP action items/takeaways to implement in 2025:

- 1. Item 1
- 2. Item 2
- 3. Item 3

BONUS!

Section 5: Content Strategy

5.1: Build Authority with Content.

List the top 10–20 questions your prospects might be searching on Google:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Decide how you will answer their questions:

☐ **Format**

- ☐ Short form video (CapCut,
- ☐ Blog Content
- ☐ Webinar
- ☐ Infographic
- ☐ Whitepaper
- ☐ Social Posts

☐ **Distribution**

- ☐ Website
- ☐ Email
- ☐ LinkedIn
- ☐ YouTube
- ☐ Google Business Profile

5.2: Craft Content for Your Entire Year

Use prompts from the webinar to create your content, and put your action plan in place.

Content	Jan	Feb	March	April	May	June
Blog						
Infographic						
Webinar						
Podcast						
White Paper						
Testimonial						
Social Media						
Video						

Content	July	Aug	Sept	Oct	Nov	Dec
Blog						
Infographic						
Webinar						
Podcast						
White Paper						
Testimonial						
Social Media						
Video						