

*infiltrate*

# RESOURCE GUIDE

**enter or gain access to an  
organization, place, etc.,  
strategically and systematically"**

COMPANION TOOLS & TEMPLATES TO HELP  
YOU CREATE YOUR MARKETING STRATEGY

# MARKET

## 1. MARKET ENTRY PLAN

### WHAT IT IS:

A comprehensive worksheet to define your market positioning, launch strategy, messaging, budget, and success metrics. This tool helps you answer: How will you enter your market? What will you say? Who will you reach? And how will you measure success?

### WHY YOU NEED IT:

The Market Entry Plan cards prompt you to consider positioning, channels, and launch strategy, but you need a structured approach to map it all out. This worksheet gives you a step-by-step framework to create a clear, actionable market entry plan.

### HOW TO USE IT:

**STEP 1:** Define Your Market Positioning Answer: What problem do you solve? Who is your ideal customer? What makes you different? Write your brand positioning statement using the formula provided.

**STEP 2:** Choose Your Entry Strategy. Decide: Will you do a soft launch, hard launch, stealth launch, or pre-launch? Map out your timeline (pre-launch, launch day, post-launch) and choose your announcement channels.


**STEP 3:** Craft Your Launch Messaging. Define what you want people to know, feel, and do. Choose your call-to-action (e.g., buy, sign up, join waitlist) and plan your launch content (e.g., announcement posts, behind-the-scenes content, testimonials).

**STEP 4:** Set Your Launch Budget Break down your budget: paid ads, content creation, tools, partnerships, and other expenses. Identify who's on your launch team (you, VA, designer, copywriter, etc.).

**STEP 5:** Define Success Metrics Decide how you'll measure launch success: sales/sign-ups, email list growth, website traffic, social media engagement, media mentions, or partnership inquiries. Set specific goals for each metric.

**STEP 6:** Plan Your Post-Launch Strategy What will you do after launch? Thank customers, collect feedback, analyze metrics, continue content marketing, and plan your next campaign.

 **Download:** [Market Entry Plan Worksheet PDF](#)

 **Tip:** Complete this worksheet 4-6 weeks before your launch. Share it with your team (or accountability partner) so everyone knows the plan. A clear plan = a confident launch.

# MARKET

## 2. CONTENT CALENDAR

### WHAT IT IS:

A 90-day content planning system to map out your content pillars, posting schedule, monthly themes, and content ideas. Includes a batching plan and repurposing strategy so you can create once and post everywhere.

### WHY YOU NEED IT:

The Content Calendar card asks you to plan 90 days of content—but without a structured system, it's overwhelming. This tool breaks it down into manageable steps: pillars, schedule, themes, batching, and repurposing.

### HOW TO USE IT:

**STEP 1: Define Your 3-5 Content Pillars**Content pillars are the main themes or topics you'll post about. Examples: Education, Inspiration, Behind-the-Scenes, Customer Stories, Promotions. Write yours down.

**STEP 2: Choose Your Content Formats**Decide what types of content you'll create: static posts, carousels, Reels/TikToks, Stories, long-form video, blog posts, email newsletters, live videos, podcasts, or other.

**STEP 3: Set Your Posting Schedule**For each platform (Instagram, Facebook, LinkedIn, TikTok, YouTube, Blog, Email), decide how often you'll post per week and the best days/times. Create a weekly content theme (e.g., Monday = Motivation, Tuesday = Tips, etc.).


**STEP 4: Plan Your 90-Day Content Themes**For each of the next 3 months, choose a monthly theme, key topics, and any campaigns or promotions you'll run.

**STEP 5: Batch-Create Content**Decide when you'll batch-create content (e.g., every Sunday), how many posts you'll create per batch, and what tools you'll use (Canva, CapCut, etc.). Schedule a day to upload and schedule content in Later, Buffer, or Planoly.

**STEP 6: Build Your Content Ideas Bank**Brainstorm 30 content ideas you can create right now. Keep this list handy for when you need inspiration or have extra time to create.

**STEP 7: Create a Repurposing Plan**Plan how you'll repurpose content across platforms. Example: Turn a blog post into a carousel for Instagram, a podcast episode into audiogram clips for Stories, a YouTube video into short clips for TikTok/Reels.

 **Download: [90-Day Content Calendar Sheet](#)**

 **Tip: Plan your content in batches (monthly or quarterly), but stay flexible. If something timely or trending happens, adjust your schedule. Consistency + flexibility = sustainable content strategy.**

# ORGANIC

## 3. ORGANIC GROWTH STRATEGY

### WHAT IT IS:

A step-by-step plan for audience growth without paid ads, covering goals, engagement strategies, hashtag use, collaboration, community-building, and a tracker for organic growth.

### WHY YOU NEED IT:

The Organic Growth cards offer ideas, but a structured plan is essential for consistent execution. This worksheet helps set goals, select tactics, and track progress for strategic audience growth.

### HOW TO USE IT:

#### Step 1: Set Organic Growth Goals

Define specific 3-month growth targets for followers, email lists, and website traffic.

#### Step 2: Choose Focus Platforms

Select 2-3 platforms for growth efforts, such as Instagram or LinkedIn.

#### Step 3: Plan Engagement Strategy

Decide on engagement methods and set a daily time commitment.

#### Step 4: Build Hashtag Strategy

Create four categories of hashtags with 5-10 per category and determine usage per post.

#### Step 5: Identify Collaboration Opportunities

List 10 potential partners for collaborations and decide on collaboration types.

#### Step 6: Build Your Community

Plan how to foster a community around your brand and define the value provided.

#### Step 7: Track Organic Growth Tactics

Use the tracker to document tactics, frequency, and platforms.

 **Download:** [Organic Growth Strategy Worksheet PDF](#)

 **Download:** [Hashtags Worksheet PDF](#)

 **Tip:** Commit to 3-5 tactics weekly for 90 days and track results monthly to optimize efforts.



# NETWORKING

## 4. NETWORKING & REFERRAL STRATEGY

### **\*Networking & Referral System Overview:\***

#### **What It Is:**

A system for building relationships and generating referrals, including networking goals, outreach templates, nurturing tactics, and a referral program.

#### **Why You Need It:**

Provides structure to ensure follow-ups and referrals are not overlooked, turning relationships into revenue.

#### **How to Use It:**

##### **Step 1: Set Networking Goals**

Define monthly connection and conversation targets.

##### **Step 2: Choose Networking Channels**

Identify platforms (e.g., LinkedIn, events) for networking.

##### **Step 3: Plan Networking Strategy**

Determine the conversation initiation methods and utilize the provided templates.

##### **Step 4: Nurture Relationships**

Follow up, send personalized messages, and celebrate others' successes.

##### **Step 5: Create Referral Strategy**

Generate referrals through customer asks, referral programs, and partnerships.

##### **Step 6: Track Networking Activity**

Log interactions with a tracker for consistency.

##### **Step 7: Identify Referral Partners**

List potential partners who serve your ideal customer without competing.

 **Download:** [Networking & Referral Strategy Worksheet PDF](#)

 **Tip:** Networking is about relationships, not transactions. Focus on giving value first (share their content, make introductions, offer help) before asking for anything. The referrals will come naturally.

# NETWORKING

referral

## 5. MARKETING METRICS TRACKER

### WHAT IT IS:

A comprehensive 8-sheet dashboard system to monitor your entire marketing ecosystem: Dashboard Overview, Monthly Tracker (daily metrics), Social Media Performance, Email Marketing Campaigns, Website Analytics, Paid Advertising ROI, Goals & Benchmarks, and Content Performance Analysis.

### WHY YOU NEED IT:

This tracker provides a centralized system to monitor your marketing performance across all channels, helping you identify what's working, what's not, and where to focus your energy and budget for maximum ROI.

### HOW TO USE IT:

#### Step 1: Set Goals & Benchmarks

Start by defining your marketing goals and targets in Sheet 1. Use industry benchmarks to set realistic expectations for your business stage.

#### Step 2: Track Daily Metrics

Log daily reach, impressions, engagement, and leads in the Monthly Tracker to monitor momentum and spot trends early.

#### Step 3: Monitor Social Media

Track platform-specific performance and post type breakdowns weekly to identify which platforms and content formats drive the best results.

#### Step 4: Analyze Email Campaigns

Evaluate each email campaign by tracking open rates, click rates, conversions, and revenue by email type (newsletter, promo, nurture, etc.).

#### Step 5: Review Website Analytics

Monitor monthly website traffic, conversion rates, bounce rates, and traffic sources to understand visitor behaviour and optimize your funnel.

#### Step 6: Track Paid Advertising

Log ad spend, ROAS (Return on Ad Spend), CPC (Cost Per Click), and platform-by-platform performance to maximize your advertising budget.

# NETWORKING

## referral

## 5. MARKETING METRICS TRACKER


### Step 7: Evaluate Content Performance

Analyze which content types and topics perform best to guide your content strategy and double down on what resonates with your audience.

### Step 8: Review Dashboard & Adjust

Use the auto-populated Dashboard for weekly quick checks and monthly deep dives. Assess what's working, what needs adjustment, and set priorities for the next period.

 **Download:** [Marketing Metrics Tracker Google Sheet](#)

 **Tip:** Set a recurring calendar reminder every Monday morning to update your metrics. Tracking = accountability. If you don't track, you can't improve.

# QUICK Tools

## QUICK LINKS & TOOLS

### 1. MARKETING STRATEGY & PLANNING

- [HubSpot Marketing Plan Template](#) Free downloadable template with step-by-step guide to building your marketing plan
- [Neil Patel's Marketing Strategy Guide](#) Comprehensive guide covering marketing fundamentals, strategy development, and execution
- [CoSchedule Marketing Strategy Templates](#) Collection of free templates for marketing calendars, campaigns, and strategic planning
- [\\$100M Offers by Alex Hormoz](#) Learn how to create irresistible offers that make your marketing 10x more effective (free book + resources)

### 2. CONTENT CREATION & SCHEDULING

- [Canva Design School](#): Free tutorials on graphic design, branding, and visual content creation
- [Buffer's Content Marketing Library](#) Articles, guides, and templates for content strategy and scheduling
- [Loom Video Tutorials](#) Learn how to create quick video content for social media and marketing

### 3. SOCIAL MEDIA MARKETING

- [Meta Blueprint \(Facebook & Instagram Training\)](#) Free official training courses for Facebook and Instagram marketing
- [Later's Instagram Marketing Blog](#) Up-to-date strategies, algorithm updates, and best practices for Instagram
- [LinkedIn Marketing Solutions Learning](#) Official LinkedIn guides for B2B marketing and professional networking

### 4. EMAIL MARKETING

- [Really Good Emails](#) Inspiration gallery of high-performing email designs and copy
- [Mailchimp Email Marketing Guide](#) Comprehensive guide covering strategy, design, automation, and analytics
- [OptinMonster Email Marketing Resources](#) Tutorials on list building, segmentation, and conversion optimization



# QUICK Tools

## QUICK LINKS & TOOLS

### 5. SEO & WEBSITE OPTIMIZATION

- [Moz Beginner's Guide to SEO](#): Complete SEO fundamentals course from keyword research to link building
- [Google Search Central](#): Official Google documentation for SEO best practices and guidelines
- [Ahrefs SEO Blog](#): Advanced SEO strategies, case studies, and actionable tutorials

### 6. PAID ADVERTISING

- [Google Ads Skillshop](#) Free official certification courses for Google Ads and YouTube advertising
- [Facebook Ads Library](#) Search and analyze competitor ads across Facebook and Instagram
- [WordStream PPC University](#) Free courses on pay-per-click advertising strategy and optimization

### 7. ANALYTICS & TRACKING



- [Google Analytics Academy](#) Free certification courses on Google Analytics setup and data analysis
- [Hotjar Academy](#) Learn heatmaps, user recordings, and conversion optimization techniques
- [Databox Metrics & KPIs Library](#): Comprehensive library of marketing metrics definitions and benchmarks

### 8. NETWORKING & PARTNERSHIPS

- [SCORE Mentorship Resources](#): Free business mentorship and networking resources for entrepreneurs
- [Alignable Local Business Network](#) Platform for connecting with local business owners and building partnerships
- [Partnership Marketing Guide by Impact](#): Complete guide to building strategic business partnerships and collaborations

### 9. PR & MEDIA OUTREACH

- [HARO \(Help A Reporter Out\)](#) Connect with journalists and get featured in major media publications
- [Cision PR Resources](#) Media lists, press release templates, and PR strategy guides
- [Podcast Guest Academy](#) Learn how to pitch yourself as a podcast guest and leverage audio content

 **PRO TIP:**Bookmark this page and revisit these resources as you work through each INFILTRATE card. Don't try to consume everything at once—focus on the category you're currently implementing in your 90-day marketing plan. Quality over quantity. Master one channel before adding another. 



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