9 Free Microsoft Excel Templates to Make Marketing Easier

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Many of us can recall a time in high school when we were sitting in math class and thinking, "When am I *ever* going to use this stuff in the real world?"

And then we suddenly find ourselves in the real world, only to realize that numbers actually do play a pivotal role in what we do -- especially in digital marketing.

Trouble is, many marketers are right-brained, meaning Excel spreadsheets riddled with numbers and formulas aren't all that inviting. Making them from scratch can be especially intimidating.

While we won't argue with that, we will say that the advantages of leveraging Excel's functionality to organize information and streamline tasks are unparalleled. To help those of you looking for a way to sharpen your skills, we've put together a detailed list of ways you can start using Excel to simplify your marketing tasks. Complete with templates, these suggestions will have you making strides in no time. Know what's even better? You can <u>download this full collection of Excel templates</u> in one fell swoop.

Download all 9 Excel templates right here.

How to Use Excel Spreadsheet Templates to Make Your Marketing Easier

1) Use It as a Budget Template

CONTENT BURGET (MONTUUM)		Hub\$	oot		in your pr e								
CONTENT BUDGET (MONTHLY)			رمرم	(Tho	se "\$100" e	ntries are	placeholde	rs.)					
2014 Projected Expenses													
CONTENT	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	2015 Total
SOFTWARE													
Design (e.g. InDesign)	\$100	\$100	\$100										\$300
Project management (e.g. Basecamp)	\$100	\$100	\$100										\$300
Analytics (e.g. TrackMaven)	\$100	\$100	\$100										\$300
Marketing automation (e.g. HubSpot)	\$100	\$100	\$100										\$300
Webinar hosting (e.g. WebEx)	\$100	\$100	\$100									•	\$300
PUBLISHING TOOLS													
Blogging platform (e.g. HubSpot)	\$100	\$100	\$100										\$300
Landing page/CTA system (e.g. HubSpot)	\$100	\$100	\$100										\$300
Premium content platform (e.g. SlideShare PRO)	\$100	\$100	\$100									_	\$300
SERVICES													
Storage/file-sharing (e.g. Box)	\$100	\$100	\$100										\$300
Stock photography subscription (e.g. ThinkStock)	\$100	\$100	\$100										\$300
Licensed/syndicated content (e.g. NewsCred)	\$100	\$100	\$100										\$300
Content curation (e.g. Curata)	\$100	\$100	\$100										\$300
FREELANCERS													
Writers	\$100	\$100	\$100										\$300
Designers	\$100	\$100	\$100										\$300
Developers	\$100	\$100	\$100										\$300
TOTAL	\$1,500	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,500

While marketing budgets vary from business to business, the need for structure and a clear sense of alignment between your goals and your spending is critical across the board. To ensure you're always prepared for unanticipated costs, it's important that you're not only allocating your budget thoughtfully and properly, but that you're also keeping tabs on how closely you're sticking to your projected expenses.

If you want to avoid a mess at the end of the month or quarter, take a look at this collection of 8 marketing budget templates, designed to help you organize your marketing spend better. From product marketing, to website redesign, to content marketing, to events, these templates serve as a guide for marketers to visualize and track their expenses to avoid overspending.

The collection also contains a master marketing <u>budget template</u> that'll help you generate a high-level visualization of your marketing budget on both a month-by-month and quarterly basis.

Download the marketing budget templates here.

2) Use It as a Blog Editorial Calendar

HubSpot		TOPIC/TITLE	CONTENT/DETAILS	KEYWORD(S)	TARGET PERSONA(S)	OFFER/CTA
MONDAY						
Author:	Pamela Vaughan	12 Revealing Charts to Help You			Owner Ollie, Mary Marketer	Free Report:
Due Date: Publish Date:	10/20/12 10/23/12	Benchmark Your Business Blogging Performance (NEW DATA)	benchmark your efforts to garuntee success	blogging benchmarks		Marketing Benchmarks from 7K Businesses
TUESE	DAY					
Author:	Anum Hussain	Top SEO Tips Straight From the			Owner Ollie, Mary Marketer	Free Guide: Learning
Due Date:	10/20/12	Industry Experts [INFOGRAPHIC]	promoting complete guide	optimization, SEO		SEO from the Experts
Publish Date:	10/23/12					
WEDNE	SDAY					
Author:	Maggie Georgieva	How to Craft the Right Questions for	Use an exceptt from the Marketing Surveys ebook	marketing surveys,	Owner Ollie, Mary Marketer	The Ultimate Guide to
Due Date:	Value Most Madesting Communication			survey marketing		Using Surveys in Your Marketing
Publish Date:	10/23/12		practices			Marken M

Blogging plays a significant role in your ability to attract visitors and leads to your website. But managing a blog is one of those responsibilities that's easier said than done.

Whether you're struggling with ideation, consistency, or simply just lacking organization, an editorial calendar can often serve as the solution you need to refocus your blogging efforts and generate even more traffic and leads from your content. Visualize the blog posts you plan to publish in a given week or month makes it easier to define overarching themes, keep track of ideas, manage contributions, and prioritize strategic distribution.

<u>Use this editorial calendar template</u> as the starting point for keeping track of all of your business' content. It'll help you be more mindful of topic selection, buyer personas, keyword inclusions, and CTA alignment.

Download the blogging editorial calendar template here.

3) Use It to Set SMART Marketing Goals

SMART Marketing Goals Template	Remember to have SMART Goals:
Company: HubSpot	Specific
Time Period (year, quarter, month, completion date):	Measurable
Goal: Ex: 5% increase in leads every month	Attainable
HubSpot	Realistic
поозры	Timebound

What is your overall marketing goal?	Type your goal here.
Which situation best summarizes your marketing needs?	Please select one from dropdown menu.
Based on your answer above, set a specific number for an upcoming goal.	Type your specific numerical goal here.

Whether you're planning for a new year, quarter, or month, defining a clear set of goals is critical for driving the direction of your marketing efforts and priorities.

Do you need help not only setting <u>marketing objectives</u>, but actually achieving them? Start with <u>these SMART goal planning templates</u>. Rooted in specificity, measurability, attainability, relevancy, and timeliness, these templates will help you set your team up for success while providing you with a tool for identifying your greatest marketing needs.

Download the SMART goal planning templates here.

4) Use It as an On-Page SEO Template

	Social Media Sharing				Calls to Actions	
destination page(s)	y/n	Top of the Funnel (TOFU)	TOFU Pre Optimization Conversion Rate	TOFU Post Optimization Conversion Rate	Middle of the Funnel (MOFU)	MOFU Pre Optimization Conversion Rate
http://www.domain.com/Internal-page	Yes	whitepaper download	12%	25%	needs to be worked on	NA

When it comes to SEO, there's a lot for marketers to remember in order to see results. (Put another way, there's a lot for marketers to forget.) With search engines evolving and algorithm changes turning your existing strategy on its head from time to time, it can be easy to feel overwhelmed and push off revamping your SEO strategy. However, SEO should never be treated like an afterthought.

If you're looking for the light at the end of the tunnel, pull up this handy SEO template created in Excel. Designed to make the process of managing your SEO efforts a whole lot easier, marketers can use this template to guide their strategy step-by-step or pass it off to their webmaster to serve as a helpful guide. It focuses on not keywords and SEO best practices while providing tips and tricks to identify nuances and increase productivity.

Download the on-page SEO template here.

5) Use It to Keep Track of AdWords Campaigns

Keywords	Ad Variation I	•	Ad Variation II		Ad Variation III	
Campaign - Fruit						
AdGroup - Apples						
apples	Do You Like Apples?	19	Do You Like Apples?	19	This Title Is Way Too Long	26
delicious apples	www.mattsfruitstand.com/Apples	30	www.mattsfruitstand.com/Apples	30	www.mattsfruitstand.com/Apples	30
golden delicious apples	Matt's Fruit Stand: Apples Ebook	32	How About These Apples:		This Line Is Okay To Use	24
green apples mackintosh apples	How About Them Apples?	22	Matt's Fruit Stand Has Apples	29	This Line Is Way Way Way Way Too Long	37
mackintosh apples best apples						
best apples						
red delicious apples						
jonagold apples						
them apples						
AdGroup - Oranges						
oranges	Do You Like Oranges?	20	Do You Like Oranges?	20	This Title Is Way Too Long	26 31
florida oranges	www.mattsfruitstand.com/Oranges		www.mattsfruitstand.com/Oranges		www.mattsfruitstand.com/Oranges	31
california oranges	Matt's Fruit Stand: Oranges Ebook	33	How About These Oranges:	24	This Line Is Okay To Use	24
navel oranges	How About Them Oranges?	23	Matt's Fruit Stand Has Oranges	30	This Line Is Way Way Way Too Long	37
blood oranges						
valencia oranges						
Campaign - Vegetables						
AdGroup - Potatoes						
potatoes	Do You Like Potatoes?	21	Do You Like Potatoes?		This Title Is Way Too Long	26
baking potatoes	www.mattsfruitstand.com/Potatoes		www.mattsfruitstand.com/Potatoes		www.mattsfruitstand.com/Potatoes	32
russet potatoes	Matt's Fruit Stand: Potatoes Ebook	34	How About These Potatoes:	25	This Line Is Okay To Use	24
red potatoes	How About Them Potatoes?	24	Matt's Fruit Stand Has Potatoes	31	This Line Is Way Way Way Way Too Long	37
fingerling potatoes						
yukon gold potatoes						
blue potatoes						

If you're doing your Google AdWords campaigns right, they probably aren't exactly walks in the park. That's because to get the most bang for your buck, you've set up multiple campaigns with multiple ad groups and have variations of your campaigns -- all with different content. Not only that, you're (hopefully) also keeping track of those campaigns to determine which ones to shut off, add more money to, or tweak.

Sounds like a lot to keep track of, right? But take a deep breath. This Google AdWords tracking template can keep you on top of your AdWords game. It'll help you catch mistakes and implement best practices across all the different campaigns and ad groups you're running -- for the top, middle, *and* bottom of the funnel. Not to mention, it's a perfect complement to that SEO template you've started using.

Download the Google AdWords tracking template here.

6) Use It as a Social Media Content Calendar

	Holiday Campaign Ebook Webinar Blog Post SlideShare Product Experiment					
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

Since you're probably generating tons of clicks from your AdWords campaigns and writing awesome content thanks to your blogging editorial calendar, you're going to need some help figuring out how to spread the love on social. We've got just the thing.

The <u>social media calendar template</u> is the perfect resource for helping you scale and streamline your social media marketing. When you use Excel to break out separate worksheets for each social network you're using, you'll be able to keep a repository of content ideas so you're never struck by writer's block, and always have something to post.

It's also worth mentioning that Excel really comes in handy when it comes to Twitter, as it has the ability to count your characters to help you write tweets that stay within the 140 character limit.

Download the social media content calendar template here.

7) Use It as a Service-Level Agreement (SLA) Template

STEP 1

		Persona 1	Persona 2	Persona 3	
% Of Closing Lead To Customer	Persona				Look at the last 6 months of sales data to see
	Inbound: Organic				how well you were able to close your leads from
	Inbound: Social				each persona category (or product) and each
	Inbound: Email				source. Take the average close rate and add it
	Inbound: PPC				to the correct cell. Update this on a monthly
	Outbound: Call/ Sales Rep				basis as your channels will change over time
STEP 2					
STEP 2		Persona 1	Persona 2	Persona 3	<u> </u>
STEP 2 Value Of A Lead	Persona	Persona 1	Persona 2	Persona 3	
	Persona Average Sale Price	Persona 1	Persona 2	Persona 3	I nok at the average sale price of each person
		Persona 1	Persona 2	Persona 3	
	Average Sale Price				type and add that to the top cell in their
	Average Sale Price Inbound: Organic	\$0 \$0 \$0	\$0 \$0 \$0	\$0 \$0 \$0	type and add that to the top cell in their respective column. This should also be update
	Average Sale Price Inbound: Organic Inbound: Social	\$0 \$0	\$0 \$0	\$0 \$0	Look at the average sale price of each persons type and add that to the top cell in their respective column. This should also be update on a regular basis.

It's no secret that sales and marketing are known to have a pretty rocky relationship history. Sales might think marketing isn't generating enough leads, while marketing might think their sales reps aren't capitalizing on the leads they're sending over. When it comes down to it, though, finger-pointing doesn't grow a business.

In an effort to better align your sales and marketing teams, turn to this template for creating a service-level agreement (SLA). Generally speaking, an SLA is a contract that defines the expectations sales has for marketing leads (both quantity and quality), as well as the expectations that marketing has for how sales will act on qualified leads.

With this customizable SLA template in your toolbox, you'll have the information you need to reduce tension, define a concrete monthly lead generation goal, track and measure the success of specific lead generation channels, and keep close tabs on your current sales close rates.

Download the service-level agreement (SLA) template here.

8) Use It as a Leads and Traffic Goal Calculator

	Inbound Marketing Traffic & Leads Calculator										
		appear in the orange ed boxes.	Note: This calculator is intended to help you set goals. Schedule a free session with an inbound marketing specialist who will evaluate your marketing and give actionable suggestions to help you reach these goals.								
	Enter your monthly rev	enue goal.									
Step	How much new monthly	booked revenue do you	plan to generate from inbo	und marketing?							
200,	New	Monthly Revenue:	\$25,000.00	Enter as a whole number. Example: 5000							
	Enter the % of new rev	enue needed from int	bound marketing.								
Stelly	What percentage of this	revenue do you need to	book from inbound market	ing as opposed to other sources of new leads and customers?							
egg,		Percentage:	80%								
	What's your average reve	enue per new customer	or new account?								
Step3	Avg. Re	evenue Per Client:	\$10,000.00	Enter as a whole number. Example: 750							
9,	_	y New Customers:	2.0	·							
		_									

You have to set a leads goal, but you don't know where to start. Then, once you finally figure that out, you have to determine how much traffic you need to hit that goal ... but you're not sure what approach to take there, either.

Sounds like you could use hand calculating your leads and traffic goals. Luckily, there's an Excel template for that. Rather than try to sort of these numbers on your own, this template is designed to take care of the math and leave you with a clear picture of what you need to accomplish in order to achieve your traffic and leads goals *and* ensure the health of your inbound marketing strategy.

Download the leads and traffic goal calculator here.

9) Use It to Report on Your Monthly Marketing Metrics

	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	MoM Growth
Direct Traffic	1	1	2	2	2	3	3	4	4	5	5	6	20%
Email Marketing	1	1	2	2	2	3	3	4	4	5	5	6	20%
Organic Search	1	1	2	2	2	3	3	4	4	5	5	6	20%
Paid Search	1	1	2	2	2	3	3	4	4	5	5	6	20%
Referrals	1	1	2	2	2	3	3	4	4	5	5	6	20%
Social Media	1	1	2	2	2	3	3	4	4	5	5	6	20%
Other Campaigns	1	1	2	2	2	3	3	4	4	5	5	6	20%
Offline Sources	1	1	2	2	2	3	3	4	4	5	5	6	n/a
	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	MoM Growth
Total	8	8	16	16	16	24	24	32	32	40	40	48	20%
Total Online	7	7	14	14	14	21	21	28	28	35	35	42	20%
	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	
Grand Total	20	20	30	30	30	35	35	40	40	40	45	50	11%
% Customers from Marketing	40%	40%	53%	53%	53%	69%	69%	80%	80%	100%	89%	96%	8%

Is there a feeling sweeter than hitting all of your goals for the month? How about communicating your success to your boss? Excel spreadsheets can be used to prepare comprehensive reports of your <u>marketing metrics</u> to send off to your boss -- and there's no need to work from scratch. (After all, you've already so worked hard this month.)

To simplify your reporting, <u>check out these monthly marketing metrics templates</u> (and the corresponding PowerPoint template). Each, month, you can update them quickly and easily to reflect your monthly visits, leads, customers, and conversion rates. From there, you'll have everything you need to accurately track and report on which channels are performing best. Every boss loves to see ROI, so you can't go wrong with these templates.

Download the monthly marketing metrics templates here.

How do you use Excel to streamline your marketing? Share your favorite techniques, tips, and templates in the comment section below.

Editor's Note: This post was originally published in October 2013 and has been updated for accuracy and comprehensiveness.