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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 [download this full collection of Excel templates](#) 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 BUDGET (MONTHLY)  Fill in your **projected expenses** here. (Those "\$100" entries are placeholders.)

2014 Projected Expenses	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 [budget template](#) 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 Benchmark Your Business Blogging Performance [NEW DATA]	Explain importance of blogging and how to benchmark your efforts to guarantee success	business blogging, blogging benchmarks	Owner Ollie, Mary Marketer	Free Report: Marketing Benchmarks from 7K Businesses
Due Date:	10/20/12					
Publish Date:	10/23/12					
TUESDAY						
Author:	Anum Hussain	Top SEO Tips Straight From the Industry Experts [INFOGRAPHIC]	Highlight SEO tips through expert advice while promoting complete guide	search engine optimization, SEO	Owner Ollie, Mary Marketer	Free Guide: Learning SEO from the Experts
Due Date:	10/20/12					
Publish Date:	10/23/12					
WEDNESDAY						
Author:	Maggie Georgieva	How to Craft the Right Questions for Your Next Marketing Survey	Use an excerpt from the Marketing Surveys ebook to provide readers beneficial survey best practices	marketing surveys, survey marketing	Owner Ollie, Mary Marketer	The Ultimate Guide to Using Surveys in Your Marketing
Due Date:	10/20/12					
Publish Date:	10/23/12					

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.

[Use this editorial calendar template](#) 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

Time Period (year, quarter, month, completion date):

Goal: Ex: 5% increase in leads every month



Specific
Measurable
Attainable
Realistic
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 [marketing objectives](#), but actually achieving them? Start with [these SMART goal planning templates](#). 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

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

STEP 1

		Persona 1	Persona 2	Persona 3	Look at the last 6 months of sales data to see how well you were able to close your leads from each persona category (or product) and each source. Take the average close rate and add it to the correct cell. Update this on a monthly basis as your channels will change over time
% Of Closing Lead To Customer	Persona				
	Inbound: Organic				
	Inbound: Social				
	Inbound: Email				
	Inbound: PPC				
	Outbound: Call/ Sales Rep				

STEP 2

		Persona 1	Persona 2	Persona 3	Look at the average sale price of each persona type and add that to the top cell in their respective column. This should also be updated on a regular basis.
Value Of A Lead	Persona				
	Average Sale Price				
	Inbound: Organic	\$0	\$0	\$0	
	Inbound: Social	\$0	\$0	\$0	
	Inbound: Email	\$0	\$0	\$0	
	Inbound: PPC	\$0	\$0	\$0	
	Outbound: Call/ Sales Rep	\$0	\$0	\$0	

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		
Enter your inputs in the blue shaded boxes.	Calculator results appear in the orange shaded 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.
Step 1	Enter your monthly revenue goal. How much new monthly booked revenue do you plan to generate from inbound marketing? New Monthly Revenue: <input type="text" value="\$25,000.00"/>	Enter as a whole number. Example: 5000
Step 2	Enter the % of new revenue needed from inbound marketing. What percentage of this revenue do you need to book from inbound marketing as opposed to other sources of new leads and customers? Percentage: <input type="text" value="80%"/>	
Step 3	What's your average revenue per new customer or new account? Avg. Revenue Per Client: <input type="text" value="\$10,000.00"/> Monthly New Customers: <input type="text" value="2.0"/>	Enter as a whole number. Example: 750

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	MoM Growth
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 [marketing metrics](#) 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, [check out these monthly marketing metrics templates](#) (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.