

# The Monthly Marketing Budget Worksheet

Stop guessing your budget. Work backward from a revenue goal to the spend that actually gets you there — then split it across channels with intent.

## Step 1 · Work backward from your goal

**Monthly revenue goal (\$)** \_\_\_\_\_

How much new revenue you want marketing to drive.

**Average sale value (\$)** \_\_\_\_\_

Revenue from one new customer.

**Customers needed (goal ÷ avg sale)** \_\_\_\_\_

**Your close rate (%)** \_\_\_\_\_

Share of leads that become customers.

**Leads needed (customers ÷ close rate)** \_\_\_\_\_

## Step 2 · Set your efficiency targets

**Target cost per lead (\$)** \_\_\_\_\_

What you can pay for a lead and still profit.

**Target cost per customer (\$)** \_\_\_\_\_

Cost per lead ÷ close rate.

**Implied monthly budget (leads needed × target CPL)** \_\_\_\_\_

## Step 3 · Allocate across channels

Split your budget, then check it against the implied number above.

Channel	Monthly \$	Notes
Paid search		
Paid social		
SEO & content		
Email & automation		
Creative & video		
Tools & software		

Management		
TOTAL		

**ROI check:**  $(\text{customers} \times \text{avg sale}) \div \text{total budget} = \text{your return on every \$1 spent}$ . Under 3:1 usually means the leak is in conversion or follow-up, not budget.