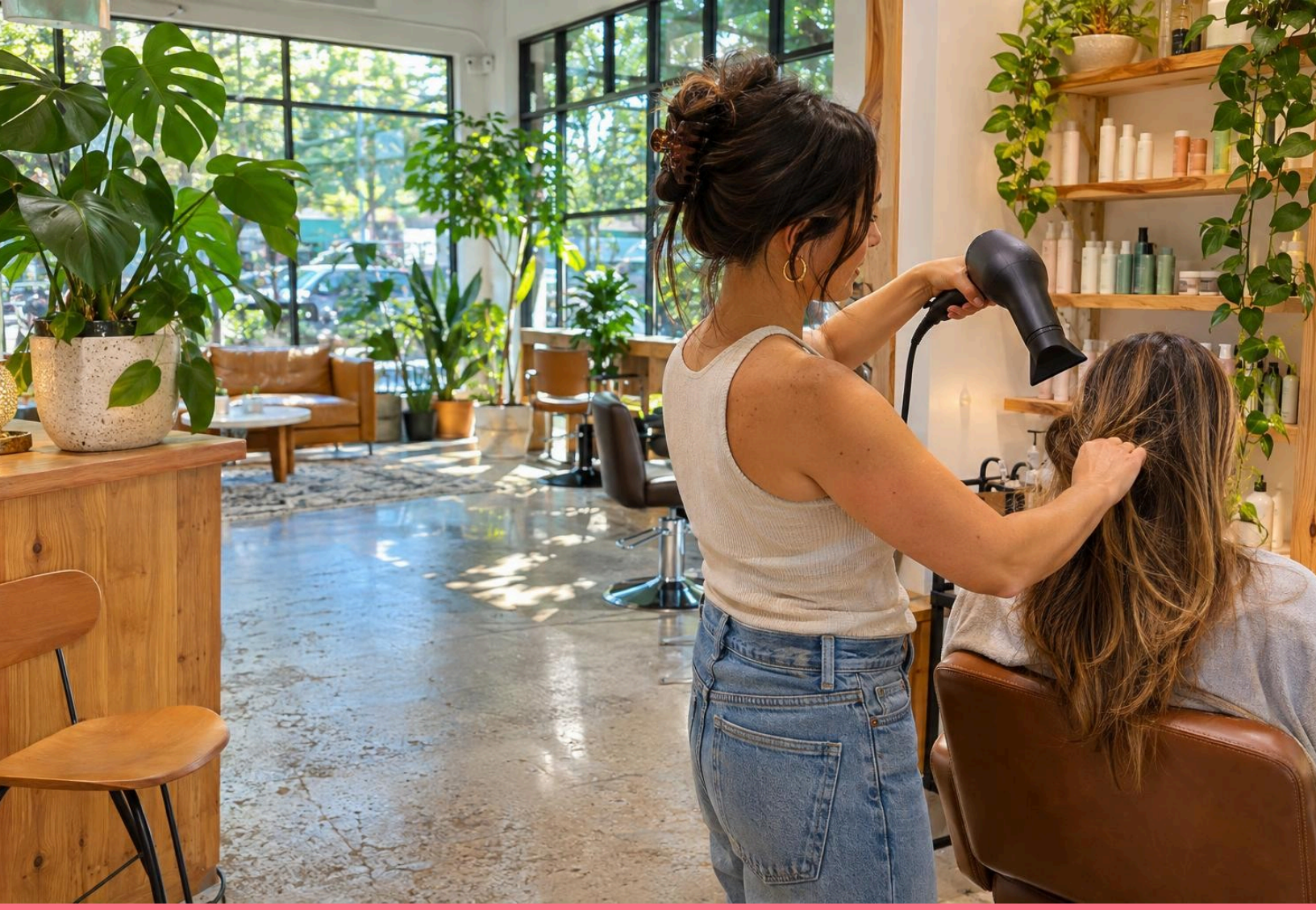


maas
a codesm company

The 2027 Beauty Business Marketing Plan Workbook

A fill-in plan for salons, spas, barbershops and med spas that want full books from clients who come back. Work through it in order and you will finish with your numbers, your clients, your channels, your budget and a weekly scorecard on paper.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our beauty business marketing plan guide at trymaas.com/blog. Read the guide once for context, then fill in one section per week. Every box in this PDF is a form field: type straight into it in Acrobat, Preview or your browser, then save.

THE THIRTEEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Customer personas
4. Competitive analysis
5. Brand positioning
6. Goals and KPIs
7. Customer journey map
8. Channel strategy
9. Content strategy and calendar
10. Budget, stack and measurement
11. 12-month plan
12. Common mistakes
13. Quick start

> **Time budget.** Most sections take 30 to 60 minutes. Do them in order: positioning (section 5) only holds up once the snapshot, SWOT, personas and competitor work are done.

NEED HELP?

If you would rather have a team build and run this plan with you, MaaS by CodeSM is an outsourced marketing team for salons, spas, barbershops and med spas. Book a call at **trymaas.com/get-a-demo**.

SECTION 1 · WHERE YOU ARE TODAY

Business snapshot

One page that anyone on your team, or any partner you hire, can read in two minutes.

BUSINESS NAME

LOCATIONS / SERVICE AREA

CORE SERVICES OR PRODUCTS

AVERAGE SALE OR CUSTOMER VALUE

TOP THREE CURRENT SOURCES OF CUSTOMERS

REVENUE GOAL FOR THE YEAR

CURRENT MONTHLY MARKETING BUDGET

WHO OWNS MARKETING TODAY

WHAT MAKES CUSTOMERS CHOOSE US OVER THE ALTERNATIVES?

WHAT HAS WORKED IN MARKETING SO FAR, AND WHAT HASN'T?

SECTION 2 · HONEST INTERNAL AUDIT

SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about your market. Every weakness is a message you should not lead with; every opportunity is a campaign you haven't run yet.

STRENGTHS

Specialties, credentials and signature services; your location and parking; a loyal core of regulars; providers clients ask for by name; strong reviews or a distinctive look on Instagram.

WEAKNESSES

Provider turnover, thin or old reviews, no online booking or deposits, a confusing service menu, low rebooking at checkout, a client list that lives in providers' phones.

OPPORTUNITIES

Underserved services nearby (textured hair, men's grooming, lash and brow, medical weight loss), Spanish-speaking clients, bridal and event groups, memberships and packages, corporate wellness.

THREATS

Suite renters and independents nearby, marketplace apps that own discovery, discount chains, providers leaving with their books, ad policy and regulatory changes for med spas.

TOP TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING

THE ONE WEAKNESS TO FIX BEFORE WE SCALE SPEND

SECTION 3 · CUSTOMER PERSONAS · PERSONA 1

The Maintenance Regular

Books every four to eight weeks and wants it to feel easy.

Comes in for color, cuts, fades, nails, brows or facials on a steady cycle and values consistency and a provider who remembers them. The highest lifetime value in the business, and the biggest risk when a provider leaves.

AGE RANGE

SERVICE AND INTERVAL

AVERAGE TICKET

PREFERRED PROVIDER

HOW THEY REBOOK

WHAT WOULD MAKE THEM LEAVE

WHAT WOULD MAKE REBOOKING AT CHECKOUT AUTOMATIC FOR THIS CLIENT?

IF THEIR PROVIDER LEFT TOMORROW, WHAT WOULD KEEP THEM WITH THE BUSINESS?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Occasion Booker

Has a date on the calendar and needs to look right for it.

Books for a wedding, prom, quinceañera, graduation or holiday event, often for a group, after finding you on Instagram, TikTok or Google. A high ticket and low loyalty unless you give them a reason to come back.

EVENT TYPE

DATE AND LEAD TIME

GROUP SIZE

BUDGET

WHERE THEY FOUND YOU

FOLLOW-UP OFFER

WHERE DO PEOPLE IN YOUR AREA LOOK FOR EVENT HAIR, MAKEUP OR SKIN PREP?

WHAT OFFER WOULD TURN A ONE-TIME EVENT CLIENT INTO A REGULAR?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Results Researcher

Is considering a treatment and wants proof before committing.

Weighing a neurotoxin, filler, laser, body treatment or medical weight loss, and researching injector credentials, results galleries, reviews, pricing and safety for weeks. Needs education and a consultation before booking.

TREATMENT OF INTEREST

MAIN CONCERN OR FEAR

RESEARCH SOURCES

BUDGET PER VISIT

CONSULT STATUS

DECISION TIMELINE

WHAT QUESTIONS DOES THIS PERSON ASK BEFORE THEIR FIRST TREATMENT, AND WHERE DO YOU ANSWER THEM?

WHAT PROOF OF SAFETY AND CREDENTIALS CAN YOU SHOW WITHOUT BREAKING AD RULES?

SECTION 4 · KNOW THE FIELD

Competitive analysis

List the four or five businesses your customers compare you with, including the ones that aren't really competitors but win the same budget. Fill in what you can see from the outside.

BUSINESS	PRICE OF CORE SERVICE	GOOGLE RATING AND REVIEW COUNT	ONLINE BOOKING AND DEPOSIT POLICY	INSTAGRAM ACTIVITY	SPECIALTIES AND CREDENTIALS	OFFERS OR MEMBERSHIPS
Us						
Competitor 1						
Competitor 2						
Competitor 3						
Competitor 4						
Competitor 5						

WHERE WE CLEARLY WIN

WHERE WE LOSE TODAY, AND WHY

SECTION 5 · ONE SENTENCE THAT DECIDES EVERYTHING

Brand positioning

Positioning is the reason a customer should pick you. Write it before you write a single ad.

For [who you serve] who [need or problem], [your business] is the [category] that [main benefit]. Unlike [main alternative], we [proof].

WORKED EXAMPLE

> *For working professionals in North Dallas who want color that still looks good at week eight, Copper and Comb is the color-specialist salon that matches every client with one stylist and one formula card, because every colorist trains in our system and rebooks you before you leave.*

OUR POSITIONING STATEMENT

PROOF POINT 1

PROOF POINT 2

PROOF POINT 3

SHORT VERSION FOR THE WEBSITE HEADLINE

SECTION 6 · WHAT WINNING LOOKS LIKE

Goals and KPIs

Three to five SMART goals: specific, measurable, achievable, relevant, time-bound.

#	GOAL	CURRENT	TARGET	BY WHEN / OWNER
1				
2				
3				
4				
5				

Examples. Raise rebooking at checkout from 48% to 65% by June 30, 2027. Cut no-shows and late cancellations from 9% to under 3% within 90 days of introducing deposits. Grow Google reviews from 120 to 300 at a 4.8 average or better by December 31, 2027. For a med spa, sell 150 memberships by the end of Q3 2027 with monthly cancellations under 4%.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
New clients booked, by source					
Rebooking rate at checkout					
No-show and late-cancel rate					
Utilization of chairs or rooms					
New reviews and average rating					
Retail as a share of service revenue					

SECTION 7 · FROM FIRST SEARCH TO REPEAT CUSTOMER

Customer journey map

Where your customer is, what they are doing, and where you meet them. Fill in the last column with what you will do at each stage.

STAGE	WHAT THE CUSTOMER DOES	WHERE WE MEET THEM	OUR ACTION
Discover	Sees a Reel or TikTok, searches for a service nearby, or hears about you from a friend.	Instagram, TikTok, Google search and Maps, referrals	
Evaluate	Checks reviews, the portfolio, prices, provider profiles and credentials.	Google Business Profile, website service pages, Instagram grid	
Book	Tries to book online, calls or requests a consult. Drops off if it takes too many steps.	Booking page with deposit, phone, DMs	
Prepare	Wants to know what to expect and how to prepare.	Confirmation, reminders, intake and consent forms	
Visit	Judges the service, the consult and the front-desk experience.	In person	
Checkout	Is happiest right now and most open to booking the next visit.	Rebooking, home care recommendation, review request	
Aftercare	Wants the result to last and reassurance after medical treatments.	Follow-up text or email, care instructions, check-in	
Return	Needs a nudge when the service interval comes around.	Interval-based reminder, waitlist and openings texts	
Loyalty	Becomes a regular and starts recommending you.	Memberships, packages, referral rewards	
Win-back	Has gone 90 days past their usual interval and may have drifted to a competitor.	Personal note and a return offer	

SECTION 8 · WHERE THE BUDGET GOES

Channel strategy

Tick the channels you will run this year and name an owner for each. Investment ranges are planning ranges; adjust to your market.

USE	CHANNEL	ROLE	CADENCE	TYPICAL INVESTMENT	OWNER
☐	**Google Business Profile**	Map Pack visibility, reviews and a Book button	Weekly posts and photos, reply to reviews within days	Free, about 1 hour a week	
☐	**Website service pages and local SEO**	Rank for each service and treatment in your area	1 to 2 new pages or posts a month	$500 to $2,500 a month	
☐	**Google Search Ads**	Capture high-intent searches for your most profitable services	Always on, weighted to slow days	$500 to $3,000 a month for salons, $1,500 to $6,000 for med spas	
☐	**Instagram and TikTok organic**	Portfolio, discovery and education	4 to 6 posts a week plus daily Stories	Time plus photo and video production	
☐	**Meta ads**	Retargeting, service launches and filling slow weeks	Always-on retargeting plus monthly campaigns	$300 to $2,000 a month	
☐	**Booking marketplaces**	In-app discovery by new clients	Keep profile, photos and prices current	Platform subscription or new-client fees	
☐	**SMS and email**	Rebook reminders, openings, memberships and win-back	Automated flows plus 2 to 4 campaigns a month	$50 to $300 a month, often included in booking software	
☐	**Referral program**	The highest-trust new clients	Always on, asked at checkout	Service credits	
☐	**Creator collaborations**	Local reach with visible proof	1 to 2 a month, with disclosure	Comped services	
☐	**Memberships and packages**	Retention and predictable revenue	Review pricing and uptake quarterly	The discount or credit built into the price	
☐	**Events**	Bridal trials, injector days and gift card pushes	Seasonal	$250 to $2,500 per event	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Plan 50% to 60% short-form video, 20% to 25% carousels, daily Stories for openings and behind the scenes, and one or two emails a month. Aim for four to six feed posts a week.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Transformations	Reel or carousel	Weekly	Box dye to lived-in blonde in one appointment, with the client's written OK.
2. Process and technique	Reel	Weekly	How a skin fade is blended, in 30 seconds.
3. Meet the provider	Talking-head video	Twice a month	Why our lead injector always starts conservative with first-time clients.
4. Education and myth-busting	Carousel	Weekly	Three things a chemical peel will not do.
5. Aftercare and maintenance	Stories or carousel	Weekly	How to keep your gloss bright until week eight.
6. Seasonal and trends	Reel	Twice a month	Prom looks booking now: here is what is trending this year.
7. Client stories	Video or quote card	Twice a month	She drove 40 minutes for her cut. Here is why she keeps coming back.
8. Openings and offers	Stories and SMS	As openings appear	Two spots open Thursday afternoon. Tap to book.

OUR THREE CONTENT PILLARS THIS YEAR

SECTION 9 · CONTENT AND SOCIAL

30-day content calendar

Plan one month ahead. Write the post idea and the channel in each day you publish.

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

SECTION 10 · BUDGET ALLOCATION

Budget allocation

A starting split for a typical business in this industry. Write your own percentages and monthly dollars next to it.

TOTAL MONTHLY MARKETING BUDGET (AD SPEND + PEOPLE + TOOLS)

BUCKET	EXAMPLE	WHY	OUR %	MONTHLY $
Google Search Ads	25%	Your two or three most profitable services and treatments		
Meta ads	20%	Retargeting, launches and slow-week campaigns to the booking page		
Photo and video production	20%	Monthly content shoot and editing		
Retention	15%	SMS, email, CRM and membership promotion		
Reputation and local SEO	10%	Review requests, Google Business Profile, service pages		
Referrals and creators	5%	Referral credits and comped creator services		
Testing reserve	5%	New channels, offers or services		

WHAT WE WILL CUT FIRST IF RESULTS LAG, AND WHAT WE WILL ADD FIRST IF THEY BEAT TARGET

SECTION 10 · TOOLS AND MEASUREMENT

Tech stack and weekly dashboard

STACK CHECKLIST

- [ ] Booking software with online booking, deposits and card on file
- [ ] Required referral source field on every new client
- [ ] Google Business Profile with Book button and current photos
- [ ] Website with one page per service or treatment
- [ ] Automated confirmations and 48 and 24 hour reminders
- [ ] Review request at checkout plus an automated follow-up text
- [ ] SMS and email consent captured at booking
- [ ] Interval-based rebook reminders and a 90-day win-back flow
- [ ] UTM-tagged links in every bio, ad and text
- [ ] Tracking phone number on paid ads
- [ ] Written photo and testimonial consent form
- [ ] Med spas: ad copy checked against Meta and Google health policies

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
New clients by source				
Cost per new client				
Rebooking rate at checkout				
90-day return rate of new clients				
Utilization				
No-show and late-cancel rate				
Average ticket and retail share				
Review count and average rating				

SECTION 11 · THE YEAR AT A GLANCE

12-month action plan

The order we suggest. Move rows to fit your season, add an owner, and tick each one off.

WHEN	FOCUS	OWNER	DONE
Month 1	Snapshot, personas, positioning; booking link, Google profile and deposit policy in place		☐
Month 2	Review habit at checkout; four posts a week; first Google Search campaign		☐
Month 3	Retention automations: rebook reminders and 90-day win-back		☐
Month 4	Membership or package launch; Meta retargeting		☐
Month 5	Referral program and first creator collaborations		☐
Month 6	Mid-year review of cost per new client and 90-day return rate by channel		☐
Month 7	New service pages for local SEO; Spanish-language basics where relevant		☐
Month 8	Back-to-school and fall campaigns; refresh portfolio content		☐
Month 9	Holiday booking push opens; gift card campaign planned		☐
Month 10	Holiday events, gift cards and party bookings		☐
Month 11	Peak season: fill gaps with waitlist and openings texts		☐
Month 12	Annual review; set next year's goals and budget from source data		☐

SECTION 12 · WHAT TO AVOID

Common mistakes

The patterns we see most often in this industry, and the fix for each. Be honest about which ones apply to you.

01 Discounting the first visit too deeply

Offer value a regular would want, such as an add-on or consult credit, instead of half off.

- [ ] We do this today

02 Sending social traffic to the homepage

Link every post, bio and ad straight to booking for that service.

- [ ] We do this today

03 No deposit or card-on-file policy

Publish a policy, apply it consistently and send reminders 48 and 24 hours ahead.

- [ ] We do this today

04 Client list in providers' phones

Keep every client, note and photo in the business's booking system.

- [ ] We do this today

05 Med spa ads that break platform rules

Write ads to Meta and Google health policies first, then to the offer.

- [ ] We do this today

06 Reporting likes instead of bookings

Track new clients, rebooks and revenue by source every week.

- [ ] We do this today

SECTION 13 · STARTING FROM SCRATCH

Quick start

If you only have a few hours a week, do these in order.

DONE	WHEN	TASK
☐	**Week 1**	Fill in the snapshot, personas and positioning; pull rebooking, no-show and retail numbers.
☐	**Week 2**	Complete your Google Business Profile and use one booking link everywhere.
☐	**Week 3**	Introduce deposits or card on file and set up reminders.
☐	**Week 4**	Start asking for reviews at checkout and by text after every visit.
☐	**Month 2**	Post four times a week and launch one Google Search campaign.
☐	**Month 3**	Automate rebook reminders and a 90-day win-back message.
☐	**Quarter 2**	Add memberships, a referral program and Meta retargeting.
☐	**Year 1**	Compare channels by cost per new client and 90-day return rate, then reallocate.

NOTES

You have the plan. Want a team to run it with you?

MaaS by CodeSM is the outsourced marketing team for salons, spas, barbershops and med spas. One team for strategy, creative, paid media, SEO, web and reporting, without hiring a department.

01

A marketing audit

We review your listings, website, reviews, ads and reporting and show you where leads are slipping.

02

See where you stand

We compare your search visibility, reviews and ads with the competitors your customers actually consider.

03

A 90-day plan

You leave with a prioritized 90-day plan: channels, budget, content and KPIs.

04

Or we run it with you

Strategy, creative, paid media, SEO, web and reporting from one outsourced marketing team.

Book a call

trymaas.com/get-a-demo



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