

maas
a codesm company

The 2027 Retail and Franchise Marketing Plan Workbook

A fill-in-the-blanks plan for driving store traffic, repeat purchases and consistent marketing across every location in 2027. Complete it once for the brand, then have each store or franchisee complete the local sections for its own trade area.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our retail and franchise 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 multi-location retailers, franchise systems (brand marketing and local store marketing) and independent retailers with physical stores. 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

What do your stores do better than the big box and the marketplace app? Think product people can touch, staff expertise, exclusive brands, same-day availability, store experience and community roots.

WEAKNESSES

Where do you lose sales? Think price versus online, inconsistent experience across locations, thin or stale reviews at some stores, wrong listing data, no customer data capture, and off-brand local marketing.

OPPORTUNITIES

What could you capture in the next 12 months? Local inventory ads where competitors do not show stock, an underused loyalty or email list, new trade areas, competitor closures, AI search answers, and seasonal moments you have not owned yet.

THREATS

What could cost you share? Marketplace and big-box price matching, rising rents and occupancy costs, shifting foot traffic, discount-driven competitors, and compliance risk in how locations handle reviews, promotions and influencer posts.

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 Near-Me Shopper

Needs it today and picks the closest store that clearly has it.

Searches near me, checks hours, stock and reviews, and goes wherever the item shows as available with a good rating. Accurate listings, local inventory ads and fresh reviews win this shopper.

AGE AND HOUSEHOLD

TRADE AREA AND TRAVEL TIME

TYPICAL PRODUCTS NEEDED

SEARCH TOOLS USED (GOOGLE, MAPS, AI, APPS)

WHAT MAKES THEM CHOOSE A STORE

PICKUP OR IN-STORE PREFERENCE

WHEN THIS SHOPPER SEARCHES FOR OUR TOP 20 PRODUCTS NEAR A STORE, DO WE SHOW UP WITH STOCK AND HOURS?

WHAT WOULD TURN A ONE-TIME NEAR-ME VISIT INTO A SECOND VISIT?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Loyal Regular

Buys every few weeks and opens your emails.

Belongs to the loyalty program, knows the staff and values recognition, early access and convenience more than discounts. Most of your margin lives with this customer.

VISIT FREQUENCY

AVERAGE SPEND PER VISIT

LOYALTY TIER OR STATUS

PREFERRED CHANNEL (EMAIL, SMS, APP)

FAVORITE CATEGORIES

WHAT WOULD MAKE THEM VISIT MORE OFTEN

WHAT DO WE GIVE REGULARS THAT A DISCOUNT-HUNTING FIRST-TIMER DOES NOT GET?

HOW WOULD WE KNOW IF A REGULAR STARTED DRIFTING AWAY?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Occasion Planner

Shops for holidays, gifts, back-to-school, events or projects.

Researches online for days or weeks, compares across brands and responds to the retail calendar. Gift guides, Shopping ads and well-timed email move this shopper from browsing to buying.

OCCASIONS THEY SHOP FOR

BUDGET RANGE

RESEARCH SOURCES AND TIMING

BRANDS THEY COMPARE YOU WITH

GIFT OR SELF-PURCHASE

DECIDING FACTOR (PRICE, SELECTION, SERVICE)

WHICH THREE CALENDAR MOMENTS MATTER MOST TO THIS SHOPPER IN OUR CATEGORY?

HOW EARLY DO THEY START RESEARCHING, AND WHERE DO THEY SEE US FIRST?

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	GOOGLE RATING AND REVIEWS PER LOCATION	PRICE POSITION AND PROMOTION CADENCE	LOCAL INVENTORY AND PICKUP SHOWN ONLINE	LOYALTY PROGRAM AND MEMBER PERKS	EMAIL AND SMS FREQUENCY	SOCIAL PRESENCE AND CREATOR CONTENT
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 busy pet owners within ten minutes of a store, Brightside Pet Supply is the neighborhood pet shop that has your food in stock when the big box is out, because every store holds a 30-day buffer on the 200 items members buy most and shows live stock on Google.*

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 the average Google rating across 24 locations from 4.3 to 4.6, with at least 100 reviews per location, by December 2027. Grow email and SMS reachable customers from 18,000 to 40,000 by year-end. Lift loyalty-member share of sales from 35% to 45%. Increase Q4 2027 same-store sales 5% while holding promotional discounts at or below 12% of sales.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
Sales by location versus last year					
Transactions and average order value					
Loyalty-member share of sales					
New email and SMS opt-ins per store					
New reviews, rating and response time per location					
Business Profile calls and direction requests					

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
Need	Something runs out or breaks, or an occasion is coming up.	Replenishment emails, seasonal social, member reminders	
Search	Searches near me, asks an AI assistant or opens a marketplace app.	Google Business Profile, Apple Maps, location pages, AI answers	
Compare	Checks reviews, stock, price, hours and pickup options.	Local inventory ads, Shopping ads, review sites, product pages	
Plan the visit	Gets directions, calls, reserves or buys online for pickup.	Business Profile actions, buy online pick up in store, store pages	
Store visit	Judges displays, staff help and checkout speed.	Store team, signage, in-store displays	
Purchase	Buys in store, at pickup or through ship from store.	POS, e-commerce checkout, pickup counter	
Capture	Joins loyalty or opts in to email and SMS if there is a reason to.	Register prompt, receipt QR code, loyalty sign-up	
Follow-up	Decides whether the purchase was worth it.	Receipt email, care tips, review request, cross-sell	
Repeat	Comes back for replenishment, new arrivals or member offers.	Automated flows, member perks, new arrival alerts	
Advocacy	Leaves reviews, posts, refers friends or buys gifts for others.	Review program, UGC reshares with permission, referral offers	

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 (per location)**	Local visibility, calls and directions	Weekly posts, monthly photos, hours checked before holidays	Time plus listings tool	
☐	**Apple Business Connect**	Apple Maps and Siri visibility	Monthly updates	Free plus time	
☐	**Location pages on your website**	Local SEO and AI answers for each store	One page per store, refreshed quarterly	$150-$400 per page to build	
☐	**Google Shopping and Performance Max with local inventory**	Product discovery with in-store stock	Always on, daily feed	$1,500-$15,000/mo	
☐	**Google Search**	Brand, category and store-level intent	Always on	$1,000-$8,000/mo	
☐	**Meta and short video**	Local awareness, launches, retargeting	Always on plus event bursts	$1,000-$10,000/mo	
☐	**Email**	Retention, launches, replenishment	Weekly campaigns plus automated flows	$100-$1,500/mo platform	
☐	**SMS**	Time-sensitive offers and pickup alerts	2-4 messages per month	$100-$1,000/mo platform	
☐	**Loyalty program**	Visit frequency and data capture	Always on	Rewards cost plus platform	
☐	**Reviews program**	Fresh reviews and responses per location	Daily requests, replies within 48 hours	$50-$150 per location/mo	
☐	**Influencer and UGC**	Local discovery and social proof	1-3 creators per quarter per market	$200-$2,500 per post	
☐	**Local events and print**	Openings, community and seasonal presence	Monthly or seasonal	$250-$2,000 per event	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Roughly 50% short video, 25% carousels and product photography, 15% customer content and reviews, and 10% community. Corporate produces core assets monthly; each location adds 1 to 2 local posts a week, alongside 3 to 5 brand posts a week and a weekly email.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. New arrivals	Short video or carousel with stock by store	Weekly	Just landed this morning: the spring planters, and which three stores have the large sizes.
2. Staff picks	Short video with a named employee	Weekly	Dana has worked our paint counter for nine years. These are the two primers she actually uses.
3. How-to and product education	Short demo video or blog post	2 per month	How to pick the right running shoe in 60 seconds, without a treadmill test.
4. Bundles and gift guides	Carousel, email and landing page	Each calendar moment	Ten Mother's Day gifts under $40, all in stock at your nearest store.
5. Customer content	Reshared photo or video with permission and disclosure	2 per week	How a customer styled our oak console table in a 600-square-foot apartment.
6. Store moments	Photo or short video	Weekly per location	Behind the counter on opening morning at our newest location.
7. Member perks	Email, SMS and social	Monthly	Members shop the new collection 48 hours before everyone else.
8. Community	Photo and story	2 per month per location	Our Westside team spent Saturday stocking the food pantry at Jefferson Elementary.

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 Shopping, Performance Max and Search	28%	Product and local intent with in-store inventory		
Meta and short video ads	20%	Local awareness, launches and retargeting by trade area		
Content and creative production	14%	Photo, video and creator content for brand and local use		
Email, SMS and loyalty	12%	Platforms, automated flows and member offers		
Local SEO, Business Profiles and reviews	10%	Listings tools, location pages and review program		
Local events, print and community	8%	Openings, sponsorships and seasonal print		
Testing reserve	8%	Move money to what is working during a promotion		

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

- [ ] One owner account for every Google Business Profile, verified in bulk for 10 or more locations
- [ ] Apple Business Connect for every location
- [ ] Store codes matched across Business Profiles, Merchant Center and POS
- [ ] Merchant Center product feed plus local inventory feed
- [ ] GA4 with one UTM convention across all channels
- [ ] POS and loyalty data connected to email and SMS
- [ ] Email and SMS platform with consent capture and opt-out handling
- [ ] Review request and response tool with one policy for all locations
- [ ] Brand template library for local ads, print and social
- [ ] Shared marketing calendar visible to corporate and every location
- [ ] Creator agreement template with disclosure requirements
- [ ] Location-level reporting dashboard

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
Sales by location versus last year				
Transactions and average order value				
Loyalty-member share of sales				
New opt-ins per store				
Review count, rating and response time per location				
Business Profile calls and direction requests				
Email and SMS revenue per send				
Blended return on ad spend				

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; audit and fix every location's Business Profile and Apple listing		☐
Month 2	One review policy for all stores; POS opt-in capture and welcome email flow		☐
Month 3	Shopping and Performance Max with local inventory; 12-month retail calendar; weekly dashboard by location		☐
Month 4	Quarterly local marketing kit for stores or franchisees; spring and Easter campaign		☐
Month 5	Mother's Day and Father's Day gift guides; first creator program		☐
Month 6	Mid-year review by location; reallocate brand fund and local spend		☐
Month 7	Back-to-school campaign; replenishment and win-back email flows		☐
Month 8	Loyalty program launch or relaunch; location page refresh		☐
Month 9	Holiday creative, offers and inventory plan; Q4 kit to every location		☐
Month 10	Halloween and early holiday push; check AI and search answers for your brand by city		☐
Month 11	Black Friday and holiday campaigns; holiday hours updated on every listing		☐
Month 12	Holiday close-out and January reset plan; annual review and next year's plan		☐

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 Planning the brand fund and local marketing separately

Put national and local activity on one shared calendar so local efforts amplify brand campaigns.

- [ ] We do this today

02 Letting every location build its own listings and ads

Centralize Business Profile ownership, store data and templates, and give locations controlled access.

- [ ] We do this today

03 Gating or rewarding positive reviews

Ask every customer the same way, offer nothing tied to sentiment, and respond to negative reviews.

- [ ] We do this today

04 Measuring online ads on online sales alone

Use store visit reporting and POS or loyalty match-back before cutting Shopping and local campaigns.

- [ ] We do this today

05 Promotions without margin math

Set a yearly discount budget and judge each promotion on new customers and gross margin.

- [ ] We do this today

06 Influencer posts without disclosure

Require clear disclosure of gifted product and payment in every creator agreement.

- [ ] 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**	Complete the snapshot, personas and positioning for the brand.
☐	**Week 2**	Audit every Google Business Profile and Apple listing; fix duplicates, hours and categories.
☐	**Week 3**	Write one review policy for every store and set up review requests and response owners.
☐	**Week 4**	Turn on opt-in capture at the POS and on receipts; build the welcome email flow.
☐	**Month 2**	Launch Shopping and Performance Max with local inventory and one Meta campaign per region.
☐	**Month 3**	Lay out the 12-month retail calendar and the quarterly local marketing kit; build the dashboard.
☐	**Quarter 2**	Launch or relaunch loyalty, add replenishment and win-back flows, and run the first creator program.
☐	**Year 1**	Review results by location and reallocate the brand fund and local spend based on store sales.

NOTES

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

MaaS by CodeSM is the outsourced marketing team for multi-location retailers, franchise systems (brand marketing and local store marketing) and independent retailers with physical stores. 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



The outsourced marketing team for multi-location retailers, franchise systems (brand marketing and local store marketing) and independent retailers with physical stores.

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