

# #14 - Master Your Marketing Calendar: A Simple System for Aging-in-Place Pros

Plan it once, work it weekly, grow all year

 by Aging in Place Directory



# Why This Webinar Matters

Hi, I'm Esther, a retired occupational therapist and certified aging-in-place specialist. Day after day I hear pros like you say:

| "I know marketing is important, but I never find the time."

This session shows you how to turn that stress into a clear, repeatable schedule you can finish in minutes a day. No tech jargon, no fancy software—just a pencil, a calendar, and a proven framework.



# Learning Goals

## 1 Understand Marketing Task Types

Explain the difference between daily, weekly, and monthly marketing tasks

## 2 Create Your Calendar

Build a 90-day marketing calendar that fits your real-life workload

## 3 Master Efficiency

Batch content creation so you stop "marketing on the fly"

## 4 Free Up Time

Automate or delegate low-value tasks to focus on clients

## 5 Measure Success

Track results with one simple scorecard, no spreadsheets required



Planning for  
tomorrow, today,



# CREATING A LIST OF ALL YOUR TASKS



## The Very First Step

The first thing to do before you start trying to assign daily, weekly or monthly tasks is to have a list of all the current tasks you are doing right now.

Know that this list will change because the one thing I learned in 25 years of marketing is that it is constantly changing. Especially when it comes to Internet Marketing.

# The Book - Atomic Habits

Written by James Clear, **Atomic Habits** offers a proven framework for improving every day through small changes. The book's core message aligns perfectly with our marketing calendar approach.

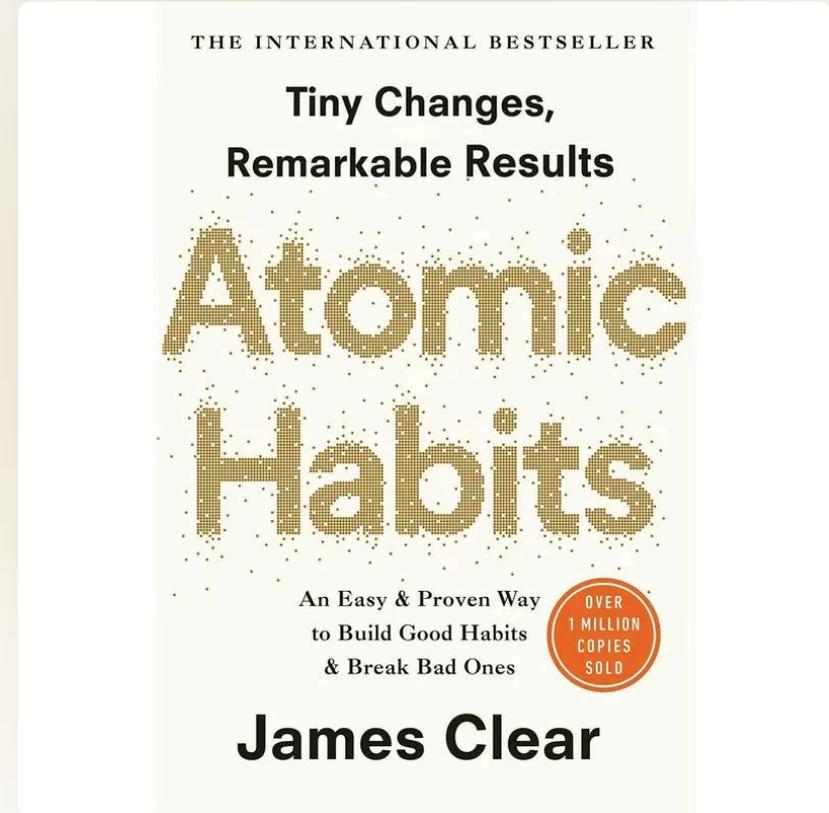
"You do not rise to the level of your goals. You fall to the level of your systems."

This is why having a **system** for your marketing is more powerful than just setting marketing goals.

## Key Concepts We'll Apply:

- 1% improvements compound over time
- Focus on systems instead of goals
- Identity-based habits stick better
- Environment design trumps willpower
- The four laws of behavior change: make it obvious, attractive, easy, and satisfying

These principles will help you transform marketing from an overwhelming task into a natural part of your business routine.



# An Example:

## In-Person Networking – *Weekly Breakfast Meeting*

**Goal:** Build relationships that lead to referrals.

### **Breakdown:**

- **Day Before the Meeting:**
  - Gather your business cards and flyers
  - Prepare a 30-second intro (what you do + who you help)
  - Review who's attending (if possible)
- **During the Meeting:**
  - Speak up when it's your turn
  - Listen for people who may need your help
  - Take notes on potential leads
  - Arrange for a coffee or lunch meeting with 1 person
- **After the Meeting:**
  - Send a follow-up message to 1–2 people
  - Connect with them on LinkedIn or Facebook

# ✓ 1. The Difference Between Daily, Weekly, and Monthly Marketing Tasks

Understanding *when* to do certain marketing tasks helps reduce overwhelm. You don't have to do everything every day. Here's how to break it down using **the 3 Bucket Rule**:

## ◆ **Daily Tasks** – Visibility & Engagement (5–10 minutes)

These are short, fast actions to stay visible and engaged.

### **Examples:**

- Reply to comments or messages on your business page
- Post a quick behind-the-scenes photo or story (“Installing grab bars today!”)
- Like, comment, or share a post in a local Facebook group
- Say thank you to a new client or referral partner

**Goal:** Stay top-of-mind without overthinking

## ◆ **Weekly Tasks** – Value & Outreach (1–2 hours)

These actions help you connect deeper and educate your audience.

### **Examples:**

- Write and schedule one helpful social post (e.g., “3 signs your parent needs home safety updates”)
- Send a short email tip to your list
- Publish a short blog or LinkedIn article
- Reach out to 1–2 referral partners (“Hi Susan, I thought of you for a client today...”)

**Goal:** Build trust, grow your reputation

## ◆ **Monthly Tasks** – Growth & Strategy (2–3 hours)

These tasks help you attract new leads and adjust your strategy.

### **Examples:**

- Review what marketing worked (check leads, calls, comments)
- Record a quick client success story for social media
- Attend a networking event or host a workshop
- Update or boost your Google Business Profile or directory listings

**Goal:** Bring in new leads and plan smarter

## 2. Build a 90-Day Marketing Calendar That Fits Your Real-Life Workload

You don't need to do *everything*. You need a plan that works **with** your schedule—not against it.

### Step 1: Choose 2–3 Marketing Channels You Can Stick With

Pick where your audience hangs out (and what you can handle).

Examples:

- Local Facebook groups
- Google Business Profile
- Email newsletter
- Your blog or LinkedIn

### Step 2: Plug In Recurring Tasks

Use this simple grid:

Task	Frequency	Example
Social post	1x/week	“Before-and-after bathroom photo”
Email tip	2x/month	“Fall Prevention Checklist”
Referral check-in	1x/month	“Call from OT to home care company”
Networking	1x/month	Attend senior expo or Chamber event
Blog post	1x/month	“How to Help Seniors with Low Vision at Home”

### 3. Batch Content Creation So You Stop “Marketing on the Fly”

Batching means creating several things at once while you're “in the zone.” Instead of scrambling every day, you set aside time once a week or month.

#### Example: 1-Hour Content Batching Session

Let's say you're an OT or contractor:

- Topic: Fall prevention
- An example of batching your tasks is as follows:
  - Monday - create a list of 40 topics / titles on the topic of Fall Prevention ([info on Webinar #2](#))
  - Tuesday - create images (if needed) to go with these 40 topics / titles ([info on Webinar #13](#))
  - Wednesday - create an article on one of these topics ([Use AI prompts on Webinar #6](#))
  - Thursday - create 2 or 3 (or more) social media posts based on the information in the article.  
Copy and paste the text of the article and go to your AI program. Use the prompt:  
*Please give me 5 social media posts based on the information in this article.*  
And then paste the article you copied.
  - Friday - Post the article on your social media platform(s).

## 4. Automate or Delegate Low-Value Tasks to Free Up Client Time

Your time is valuable. Don't waste it on the things that a tool—or another person—can do for you.

### ◆ Automation Ideas (Free or Low-Cost Tools):

- Social media scheduling: [Buffer.com](https://buffer.com) or [Later.com](https://later.com) (schedule a week's worth of posts at once)
- Email marketing: [Brevo.com](https://brevo.com) (set up welcome emails or tip sequences)
- Appointment reminders: [Calendly.com](https://calendly.com) or [Squareup.com](https://squareup.com)

### ◆ Delegation Ideas:

- Ask a teen, VA, or family member to:
  - Post photos or quotes for you
  - Update your Google Business listing
  - Upload testimonials from clients
  - Help write captions based on your voice

 *Tip:* Start with one task—don't try to delegate or automate everything at once.

## 5. Track Results With One Simple Scorecard (No Spreadsheets Required)

You only need to track a few numbers to know if your marketing is working.

### Easy Weekly Scorecard (Paper or Digital)

Just write down each week:

Metric	What to Track	Example
Leads	New calls, form submissions, DMs	“3 new calls from Google”
Engagement	Likes, comments, shares, replies	“12 likes, 4 shares”
Content	Did I post/send something this week?	“Yes: tip email sent”
Conversions	New clients from marketing?	“Signed 2 home safety evals”
Time	Time spent marketing	“45 minutes this week”

# Key Takeaways Cheat-Sheet



## Three Bucket Rule

Every task fits into Daily Visibility, Weekly Value, or Monthly Growth



## 90 Day Marketing Calendar

Build a list of tasks for 90 days.



## Batching Tasks

Batch your tasks so that you're just working on one sub-task at a time



## Automate and Delegate As Much As Possible

Start with free tools, level up to email sequences only when needed



## Measure, Measure, Measure

A 30-minute self-audit keeps your plan fresh