

MARKETING BUDGET TEMPLATE

This marketing budget template:

- Records budget figures before the start of the year and actual spending figures throughout the year.
- It divides your overall budget into 7 individual budgets common to most marketing departments: advertising, events, agencies, printing and production, technology, data and brand.

Summary	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Annual
Advertising	£3,845	£3,793	£4,527	£3,857	£6,049	£4,286	£2,535	£3,012	£5,905	£4,007	£1,728	£5,040	£48,584
Events	£4,796	£5,060	£3,856	£1,973	£4,788	£5,014	£4,241	£5,499	£6,015	£2,441	£4,381	£4,708	£52,772
Agencies	£3,452	£4,616	£3,369	£4,917	£3,064	£4,306	£3,930	£4,957	£4,153	£3,714	£5,429	£2,486	£48,393
Printing & Production	£3,877	£4,631	£2,964	£3,009	£4,302	£6,289	£4,437	£2,041	£5,296	£4,982	£4,465	£5,331	£51,624
Technology	£6,219	£3,491	£3,963	£4,718	£5,562	£4,717	£5,955	£3,836	£4,483	£3,956	£3,225	£5,718	£55,843
Data	£5,782	£3,497	£5,735	£3,850	£3,451	£3,062	£5,677	£2,105	£3,805	£2,683	£5,241	£3,724	£48,612
Brand	£4,536	£4,301	£4,771	£3,357	£4,034	£6,036	£4,395	£2,482	£4,900	£2,388	£7,297	£2,828	£51,325
Total	£32,507	£29,389	£29,185	£25,681	£31,250	£33,710	£31,170	£23,932	£34,557	£24,171	£31,766	£29,835	£357,153

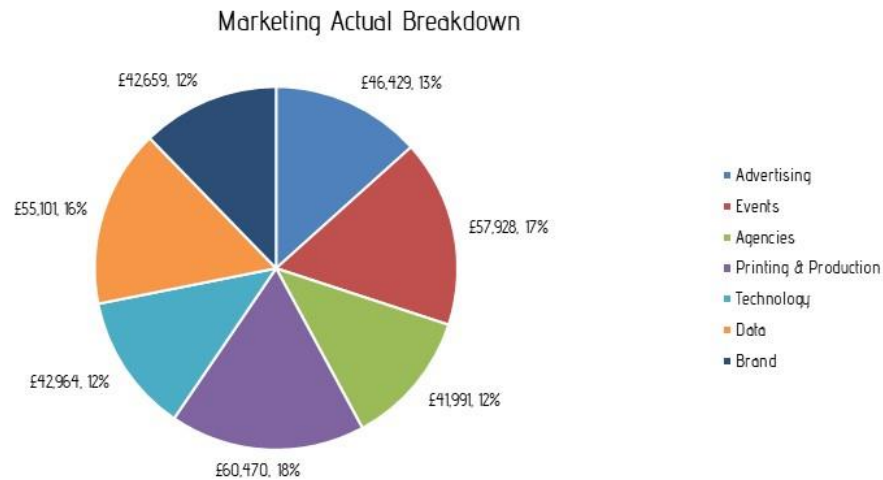
- The individual budgets can be renamed if required.
- It is massively automated. Your monthly tasks are limited to entering 7 numbers: the actual spend for each of the 7 individual budgets.
- It uses colours to highlight the size of over and underspends in the Summary worksheet.

Actual	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Annual
Advertising	£6,415	£2,888	£1,634	£2,133	£3,022	£2,449	£1,998	£4,513	£7,468	£5,682	£2,571	£2,711	£43,484
Events	£4,651	£7,174	£1,267	£4,013	£4,453	£3,548	£3,410	£5,198	£1,840	£6,398	£2,757	£6,962	£51,671
Agencies	£6,373	£3,927	£4,020	£5,558	£4,223	£6,778	£2,872	£7,492	£7,443	£2,983	£5,282	£2,944	£59,895
Printing & Production	£2,819	£6,972	£3,577	£6,651	£6,557	£4,202	£3,225	£910	£4,339	£1,405	£1,959	£2,934	£45,550
Technology	£1,853	£6,098	£5,363	£2,360	£5,997	£5,984	£1,240	£2,927	£3,077	£4,954	£2,294	£5,404	£47,551
Data	£4,157	£1,271	£2,043	£4,914	£1,716	£2,907	£7,029	£7,035	£4,154	£6,843	£7,098	£4,598	£53,765
Brand	£2,232	£1,479	£6,898	£5,425	£6,946	£3,390	£1,424	£6,269	£2,300	£4,981	£1,542	£6,199	£49,085
Total	£28,500	£29,809	£24,802	£31,054	£32,914	£29,258	£21,198	£34,344	£30,621	£33,246	£23,503	£31,752	£351,001

- A chart shows budget and actual spending for each month plus the year-to-date budget position. The same chart format is used for the overall budget and the 7 individual budgets.



- Pie charts show how the budget and actual spending is broken down between the 7 individual budgets.



- The sample data is randomly generated. It refreshes every time the spreadsheet recalculates. This happens, for example, when you save the spreadsheet or when you press F9.

Summary Worksheet

1. **Don't put any data into this worksheet.** The summary figures and charts are updated automatically based on the figures you enter into the 7 individual budgets.
2. The Summary block (A1 to N9) details your proposed budget for the year. Your 7 individual budgets are listed in Column A. Their monthly budgets are listed in Columns B to M. Column N shows you the annual budget for each of the 7.
3. The Actual block (A11 to N19) shows actual spending. This will be blank at the start of the year. The spreadsheet will compare actual spending to budgets as they appear. If the actual spending is over budget, the figure will show in red. If actual is under budget, it will be green.
4. The Year-To-Date block (A21 to M24) gives you your overall budget position. It shows you your total monthly budget in Row 22 and total monthly spending in Row 23. Row 24 shows you your balance. **NB: this is a Year-To-Date balance.** It is not the difference between the Monthly Budget and the Monthly Actual.
5. The combined bar and line chart shows the progress of your budget throughout the year.
 - a. The blue bar shows your budget.
 - b. The red bar shows actual spending.
 - c. The green line shows your Year-To-Date position. If the line is above the X axis, you have budget left - you have a surplus. If the line is below the X axis, you have overspent your budget - you have a deficit.
 - d. The charts have no borders on them so they can be inserted into presentations and other media more easily.
6. The first pie chart shows how your budget is broken down between the 7 individual budgets.

7. The second pie chart shows how your actual spending is broken down between the 7 individual budgets.

Individual Budget Worksheets

8. Change the first date in cell B1 to reflect the start of your financial year. Use the format dd/mm/yyyy. Once the first date is changed, all the other dates change automatically.
9. Enter a description of the activity in Column A.
10. Enter the monthly budget for that activity in Columns B to M.
11. The annual spend on that activity is automatically calculated in Column N.
12. The total spend for each month is calculated on Row 28.
13. Enter your actual monthly spend in Row 32.
14. Your Year-To-Date balance for this budget will be shown in Row 33. **NB: this is a Year-To-Date balance.** It is not the difference between the Monthly Budget and the Monthly Actual.
15. The chart shows the progress of your budget throughout the year.
 - a. The blue bar shows your budget.
 - b. The red bar shows actual spending.
 - c. The green line shows your Year-To-Date position. If the line is above the X axis, you have budget left - you have a surplus. If the line is below the X axis, you have overspent your budget - you have a deficit.
 - d. The charts have no borders on them so they can be inserted into presentations and other media more easily.