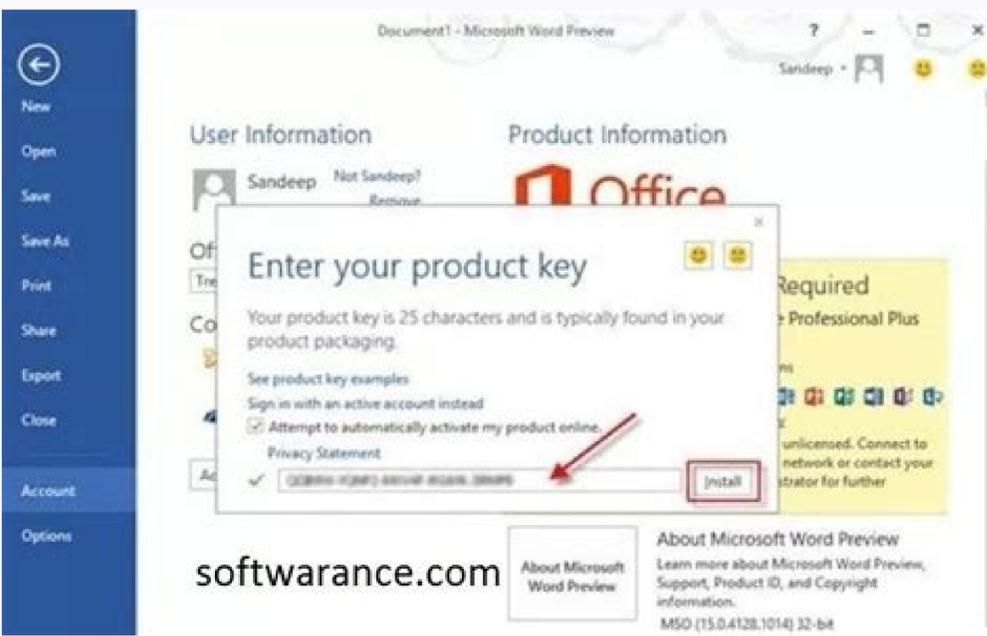
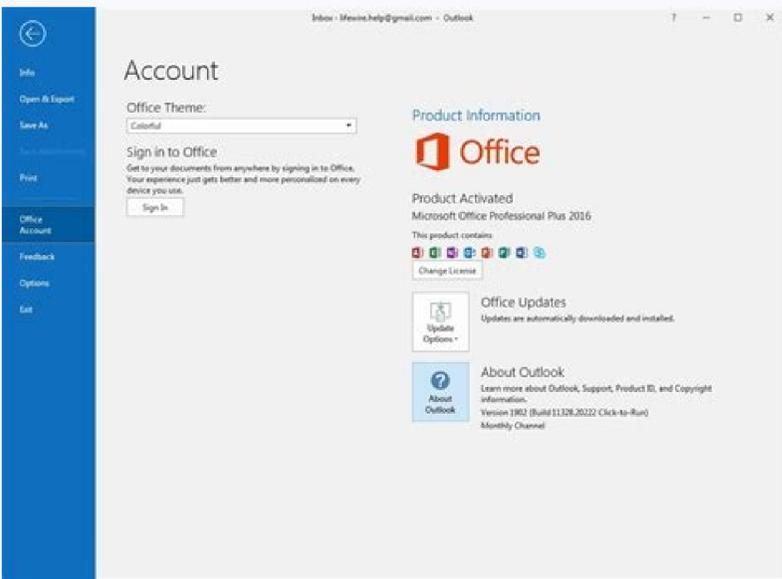
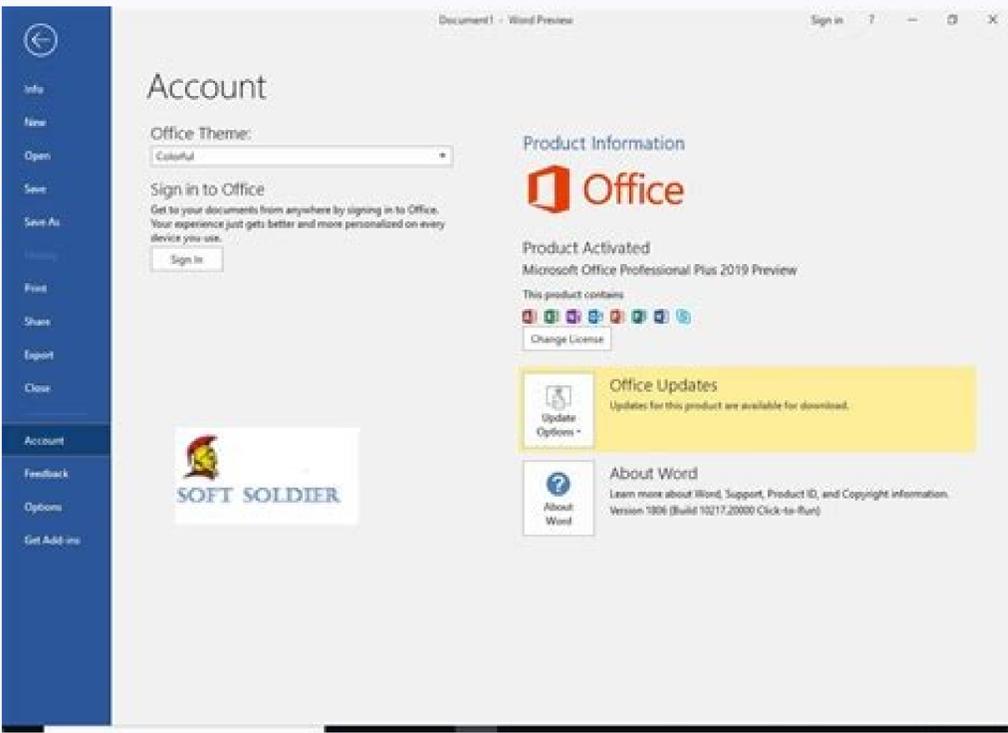


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Many of us remember the days in high school when we sat in math class and thought, "When will I ever use these things in the real world?" And then we suddenly find ourselves in the real world only to realize that numbers are central to everything we do, especially digital marketing. The problem is that many Excel templates and spreadsheets are filled with numbers and formulas that are not at all attractive. Building them from scratch can be especially intimidating. We won't mind but say that the benefits of using Excel features to organize information and streamline tasks are unmatched. To support those of you looking to improve your skills, we've put together a detailed list of ways to get started with Excel to make your marketing tasks easier. Along with templates, these suggestions will help you get started quickly. You can download multiple excel templates at once. Microsoft Excel has many options. It stores data and has data analysis tools. It performs calculations and allows code to be used for automation. And while many recognize it as a tool for calculating numbers and digits, it is much more than that. Using Excel requires learning and it takes time to master many of its uses. In addition to calculations, you can use the spreadsheet to create social media schedules, editorial calendars, campaign trackers, and more. Instead of time-consuming trial and error processes, you can use the following marketing templates to accelerate your company's success in marketing, sales, and project management. Excel Marketing Templates 1. Marketing Budget Template While marketing budgets vary from company to company, structure and a clear understanding of the alignment between goals and spending across all areas is essential. To make sure you are prepared for unexpected expenses, you need to allocate budget carefully and correctly. You also need to track how closely you stick to your projected expenses. If you want to avoid clutter at the end of the month or quarter, check out this collection of 8 marketing budget templates to help you better organize your marketing spend. From product marketing and website redesign to content and event marketing, these templates help marketers visualize and track spend to avoid overspending. The collection also includes a master marketing budget template that you can use to create an overall visualization of your marketing budget on a monthly and quarterly basis. 2. Marketing Dashboard for Excel There's no shortage of data to track when it comes to marketing, and if you feel like you're digging too deep into the weeds or missing important details like the dash above can help. This dedicated tool allows you to enter data by campaign to automatically populate visual and easy-to-read charts. As a result, you can visualize the effectiveness of spending and activities across different initiatives. 3. Monthly Marketing Report Template What better feeling than hitting all of your goals for the month? How about sharing your success with your boss? Excel spreadsheets allow you to create comprehensive reports on marketing metrics that you can send to your boss. You don't have to work from scratch. (After all, you worked so hard this month.) To simplify your reporting, try these monthly marketing indicator templates and their corresponding PowerPoint template. You can quickly and easily update them monthly to reflect monthly visits, leads, customers and conversion rates. From there, you have everything you need to track and report which channels are performing best. Every boss likes to see a return on investment, so these templates can't go wrong. 4. SMART goal matrix Whether you plan: Defining a clear set of goals on an annual, quarterly or monthly basis is critical to managing marketing efforts and priorities. Sometimes you may need help not only defining your marketing goals, but also achieving them. Get started with these SMART goal planning templates. Based on specificity, measurability, attainability, relevance, and timeliness, these templates will help set your team up for success. They will also provide you with a tool to help you identify your most important marketing needs. 5. On-Page SEO Template When it comes to SEO, marketers have a lot to do to see results. In other words, marketers have a lot to forget. As search engines evolve and algorithm changes alter your existing strategy, it's easy to feel overwhelmed and put off reviewing

your SEO strategy. However, SEO should never be a chore. If you're looking for a light at the end of the tunnel, check out this handy SEO template created in Excel. This template has been designed to greatly simplify the process of managing your SEO efforts. Marketers can use this template to guide their step-by-step strategy or give it to their webmaster to serve as a helpful guide. It focuses on keywords and SEO best practices, offering tips and tricks to learn the nuances and increase productivity.

6. Tracking Google Ads campaigns Google Ads campaigns are probably not a cake walk if they are set up correctly. This is because you set up multiple campaigns with multiple ad groups for maximum profit. You also have variants of your campaigns, all with different content. Not only that, but you (hopefully) track these campaigns to see which ones to close, add more money to, or edit. Sounds like a lot to watch, right? But take a deep breath. This Google Ads tracking template is a marketing campaign template that will help you stay on top of your Google Ads game. This will help you detect errors and best practices for all the different campaigns and ad groups you run - top, middle and bottom of the funnel. It's the perfect complement to the SEO template you're already using.

7. Lead Counting and Tracking Template It's no secret that sales and marketing have a complicated history. Salespeople may think marketing isn't generating enough leads, while marketers may think their salespeople aren't taking advantage of the leads they convert. When it comes down to it, pointing fingers won't move a business forward. To better align your sales and marketing teams, use this template to create a Service Level Agreement (SLA). Typically, an SLA is an agreement that defines sales expectations for marketing leads (both quantity and quality) and marketing expectations for sales response to qualified leads. With this customizable SLA template in your toolbox, you'll have the information you need to take the pressure off and set a specific monthly lead generation goal. You can also track and measure the success of specific lead generation channels and keep a close eye on current sales close rates.

8. Lead and Traffic Calculator Need to set a lead goal but don't know where to start. Once you finally get this right, you will need to determine how much traffic you need to achieve this goal, but you also don't know which approach to take. Sounds like you could have a hand in calculating leads and traffic goals. Fortunately, there is an Excel template for this. You don't need to sort these numbers yourself. This template takes care of the math and gives you a clear idea of what you need to do to reach your traffic and lead goals. This will also ensure that your inbound marketing strategy works.

9. Essential KPI Tracker If you like the monthly metrics template (#3 on this list), you can get a copy of this template OK GOOD. The basic KPI tracker shown above collects the data your marketing team has agreed to track and describes it in more detail. A KPI is a key performance indicator. These are your most important metrics, each with a different purpose and place in your marketing strategy. This template allows you to assign specific contributors to each KPI, specify the frequency of monitoring each KPI's performance, and assign each KPI a color that reflects the quality of that KPI's performance. For example, if one of your KPIs is organic traffic, you can configure the template so that 100 pageviews per month are red (poor performance), 500 pageviews per month are yellow (stable performance), and 1000 pageviews per month are green (great performance)

Sales Excel Templates

1. Ecommerce Planning Kit Ecommerce stores have a lot of moving parts. Planning ahead can save you time and nerves later. This kit includes a marketing plan that helps with market research, target markets, channels and vendors, etc. Once your eCommerce store is up and running, you can use a conversion template to track conversions across sellers and platforms where products are listed to give you a comprehensive picture of your efforts.

2. Lead List Template In business, your customers or customer base are the most important people. While your current customers need ongoing care, it's also important to focus on your prospect list. A prospect is a person, company or organization who might be interested in your products or services. It could be someone who has shown interest or someone who could benefit from your business. A lead list allows you to focus on leads that are similar to your existing customers. The information needed to create a lead list is basic. Begin this list with the person's name, job title, and company, location, and contact information. They may contain additional information: employee size, company description and pain points. After using such a template, you can switch to a CRM that stores the same information in a more user-friendly format.

3. Sales Forecast Template The sales forecast is similar to the weather forecast. Without the right tools, it's impossible to get an accurate picture of what to expect. While meteorologists can use Doppler radars and satellite data for their forecasts, your business can use the sales forecast template above. Sales forecasts help with business planning, budgeting and risk management. Overall, it helps to reinforce the strategy you are creating for your business. With this template, you'll be able to track your company's revenue, accurately forecast sales revenue, and plan for future growth. Sales forecasting is hard, but this spreadsheet formula makes the process easy.

3. Sales Ratio Calculator Template Selling is hard. When you add sales figures to that, the complications increase. There are many numbers and figures to calculate, track, record and document. This interactive Excel spreadsheet will help you get the job done. This template not only helps you track sales but also suppliers. Use the sales rate calculator template to calculate customer retention rates, win rates, product returns, employee turnover rates, and more.

Project Management Excel Templates

1. Social Media Scheduling You may already be using Social Media Scheduling to manage and publish your posts weekly, but you still need a place to social copy and decide which posts go to which social networks. Since most social media planning tools allow you to upload social copies in bulk from a spreadsheet, it's best to use an Excel template designed for this purpose. With this in mind, we created the Excel template shown above. This social media posting plan allows you to design every social post a) Posting time, the post you want to post, and any links you want to include in the post (blog post, registration page, ebook landing page, etc.). Once you have designed all your social media posts for a week, month, or quarter, you can sort them by social media and upload the Excel file to your social media platform of choice.

2. Editorial Blog Calendar Blogging plays an important role in attracting visitors and leads to your site. But managing a blog is one of those tasks that is easier said than done. Whether you're struggling with resourcefulness, consistency, or just a lack of organization, an editorial calendar can often serve as the solution you need to refocus your blogging efforts and generate even more traffic and leads from your content. Visualizing the blog posts you plan to publish in a particular week or month makes it easy to identify common themes, track ideas, manage posts, and prioritize strategic distribution. Use this editorial calendar template as a starting point for keeping track of all your company's content. This will help you think better about topic selection, buyer personas, keyword inclusion, and call-to-action targeting.

3. WIP Template How do you track your company's daily progress, especially when it comes to monitoring people, tasks, and schedules? A WIP (work in progress) template is needed to keep track of things. If you're not ready to use project management software like HubSpot Projects, you can still use a spreadsheet to manage your projects and processes. This template provides a design overview that makes tracking easier than ever. The Project Manager WIP template tracks tasks, time, costs, and workload. It also allows your team to change the view of the work (to-do list, spreadsheet, calendar) based on preference. This template contains all the data you need to track the lifecycle and progress of your projects.

4. Social Media Content Calendar you're probably generating tons of clicks from your Google ad campaigns and writing amazing content with your editorial blog calendar, you're going to need some help figuring out how to spread the love on social media. We have the same. The Social Media Calendar Template is a great resource to help you scale and improve your social media marketing. By using Excel to create separate worksheets for each social network you use, you'll be able to maintain a storehouse of content ideas so you never hit writer's block and always have something to post. It's also worth mentioning that Excel marketing calendar templates are useful when using Twitter as they can count your characters to help you write tweets under 280 characters.

5. Launch Plan A well-organized product launch can be the key to successful marketing and early adoption. The right plan can provide clarity and purpose as you move forward and communicate the existence of a new product to your customers and prospects. This product launch plan will help you organize your thoughts on competitor analysis, positioning and product strategy. It even provides help with brainstorming, presenting evidence and key messages for a campaign. Improve your marketing process. Data is every marketer's friend. Although it seems like spreadsheets have been around forever, Microsoft Excel is so powerful that it remains a great resource for displaying, organizing, analyzing, and analyzing data. With a little Excel magic, you can streamline your workflow and benefit from data analysis.

Editor's note: This post was originally published in March 2019 and has been updated for completeness, complexity.