



Step-by-Step Promotional Planning and Budgeting Guide

All the steps are included in this guide to help you build and execute a successful promotional program. Plan out the steps and get started.

EVENT DESCRIPTION

- Business-to-Business
 Business-to-Consumer
 Internal

Schedule:

Date of event/program launch: ____ / ____ / ____
 Order Date: ____ / ____ / ____
 Production Date: ____ / ____ / ____
 Delivery Date: ____ / ____ / ____
 Drop Date: ____ / ____ / ____

OBJECTIVES

What are you trying to achieve?

Employees	Customers	Awareness
<input type="checkbox"/> Motivate	<input type="checkbox"/> Thank	<input type="checkbox"/> New product launch
<input type="checkbox"/> Improve moral/performance	<input type="checkbox"/> Traffic Builder	<input type="checkbox"/> Rename/ reposition
<input type="checkbox"/> Performance rewards	<input type="checkbox"/> Encourage use / trial	<input type="checkbox"/> Promote
<input type="checkbox"/> Recognition	<input type="checkbox"/> Gift with purchase	<input type="checkbox"/> Cross / up sell
<input type="checkbox"/> Other _____		

AUDIENCE

Who is your primary audience?

- Present customers
 Prospective customers
 Employees
 Lost customer
 Top customers _____%
 Job function or title _____

AUDIENCE

Income level

Geography

Age Range

Men Women

Other:

MESSAGE

What major point do you want to communicate?

If you could sum up your message in one sentence, what would you say?

THEME

Does your promotion fit any theme? The list on the first page of the guide may help you generate some ideas.

What is the theme of your promotion?

What tone would you like to project?

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Exciting | <input type="checkbox"/> Informative |
| <input type="checkbox"/> Urgent | <input type="checkbox"/> Authoritative |
| <input type="checkbox"/> Factual | <input type="checkbox"/> Competitive |
| <input type="checkbox"/> Educational | <input type="checkbox"/> Agressive |

MEDIUM

What is the best way to reach your audience?

- | | |
|---|--|
| <input type="checkbox"/> Direct mail | <input type="checkbox"/> Networking |
| <input type="checkbox"/> Hand deliver | <input type="checkbox"/> Ceremonies |
| <input type="checkbox"/> Phone call | <input type="checkbox"/> Trade shows |
| <input type="checkbox"/> Email | <input type="checkbox"/> Broadcast advertising |
| <input type="checkbox"/> Fax | <input type="checkbox"/> Gift with purchase |
| <input type="checkbox"/> Face-to-Face Mtg | <input type="checkbox"/> Bundled w/ product |
| <input type="checkbox"/> Internet advertising | |

How will the fulfillment be handled?

- Hand delivered by assigned staff members
- In-house mailroom
- Outsourced fulfillment house

Are there any other sales collateral or marketing campaigns that this product must work with?

- Cover letter
- Your catalog / brochure / flyer
- Any promotional product

What type of packaging do you want to use?

- | | |
|---|---|
| <input type="checkbox"/> None | <input type="checkbox"/> Gift packaging |
| <input type="checkbox"/> Individually wrapped | <input type="checkbox"/> Custom |
| <input type="checkbox"/> Other | <input type="checkbox"/> Envelope |

DEADLINE

Date and plan for educating internal teams (marketing, sales, etc.).

Date ____ / ____ / ____

When and where must the message get to the audience for maximum effect?

- Trade show date ____ / ____ / ____
- Special event date ____ / ____ / ____
- Holiday date ____ / ____ / ____
- Specific date ____ / ____ / ____
- Product intro date ____ / ____ / ____
- Other date ____ / ____ / ____ _____

MEASURE ITS SUCCESS

How will you track the success of your program?

FINAL APPROVAL

Signature _____ Date ____ / ____ / ____

Signature _____ Date ____ / ____ / ____

Follow-up by _____ Date ____ / ____ / ____

Additional Notes:
