

Marketing Campaign Planning Worksheet

Project Description

Product Details

Describe what specific product(s) are being highlighted in this promotion.

Project Goal

Identify what the desired outcome of the project is (i.e., awareness, lead gen, conversion, profit or sales increase, etc.). Tie a numerical goal to this if possible—it should be trackable and within your control.

Budget

Deliverables Needed

Use this to identify what items are required and details of each.

- Direct Mailer**
 - Postcard | Size _____
 - Letter | Size _____
 - Folded Card | Size _____
 - Envelopes | Size _____

- Landing Page**
 - Graphics | Size _____
 - Video | Length _____
 - Storyboard
 - Copy
 - Page Copy

- Email**
 - Number of Emails _____
 - Graphics | Size _____
 - Copy

- Spotlight Image** | Size _____

- Blog Post**
 - Word Count _____
 - Graphic | Size _____

- Social Posts**
 - Graphic(s)
 - Video | Length _____
 - Storyboard
 - Copy
 - Page Copy

- Radio Ad** | Length _____
 - Storyboard
 - Copy

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Target Audience

Identify primary/secondary/tertiary audiences with as much information as possible (age, demographics, psychographics, needs, location, traits, etc.).

Competitors

List as many competitors as possible with objectives similar to this project's objectives/goals.

Key Message

Clearly state the main information you want your audience to take away.

Look/Feel/Voice

Identify your brand standards. Give some high-level direction on design expectations, concepts, etc.

Call to Action

Clearly state the project's one call to action.

Coordinating Materials/Mandatory Elements

Provide any additional materials that support this project.

Final Deliverable Due Date

Outline the timeline and due dates for the project.