Promotional Plan

Eight steps to develop a marketing campaign

Step 1 – Business goals

Understand your business goals and develop your campaign to meet them

- think about what you need to accomplish
- identify all the goals that will need marketing support

#	Goal	Description/purpose of a marketing campaign used
1.	Generate new leads	To generate new leads.
2.	Qualify leads	To better qualify and rank leads so you can segment them and then follow up based on their timeframe and likelihood of buying.
3.	Nurture existing leads	To communicate with leads that are in the pipeline but may not be ready to buy or to take the next step; a nurturing campaign reminds them of your value and provides information that can help move them along.
4.	Direct sales	To close deals within a short time period - a campaign to encourage people to "buy now."
5.	Branding	To increase awareness of your company, product and/or people in your market; to communicate the value you provide and what you stand for.
6.	Cross-sell to existing customers	To encourage current customers to buy related products or services.
7.	Up-sell existing customers	To encourage current customers to upgrade their existing product, to increase the quantity or frequency of their purchases.
8.	Nurture existing customers	To communicate with existing customers and reinforce the value you provide.
9.	Generate referrals	To encourage customers or prospects to provide referrals.
10.	Training	To train current customers, new customers, or even prospects to use your product; to train distributors, channel partners, and even your own employees.
#	Goal	Description/purpose of a marketing campaign used
1.		
2.		
3.		

Promotional Plan

Step 2 – Campaign concepts

- What campaigns have you run in the past?
- Which ones worked well?
- Can you modify them?
- Can you use a similar theme?
- What campaigns your competitors run that you liked and saw were effective?
- Think about other industries – complimentary industries, what campaigns have they used that were effective?
- Consider making emotional connections with your audience instead of focusing on products/services, information, features or benefits

List your campaign creative ideas below.

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Promotional Plan

Step 3 – Identify your target market

Who is your target market? What is their customer persona?

[Identify your ideal customer](#)

Step 4 – Select your campaign media

Choose the most appropriate media for your target market. It may be one or more.

☐Internet

    ☐Content Marketing

    ☐SEM

    ☐SEO

    ☐Social Media

    ☐Online Advertising

    ☐Webinars

☐Email Marketing

☐Direct Mail

☐Telemarketing

☐Events & Trade Shows

☐Publicity

☐Traditional Media

    ☐Print   ☐Radio   ☐Television   ☐Outdoor

☐Salesforce

For the chosen campaign media develop your [marketing campaign action plan](#) (Who, What, Where, When, How, Budget, KPI, ROI)

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Step 5 – Timing
Consider:

- Length of time campaign should run for _____

  _____

  _____

- Booster periods _____

  _____

  _____

- Key dates – events, holiday periods etc

  _____

  _____

Add the timeframes to your [marketing campaign action plan](#)

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Step 6 – Determine your message and offer

Determine your key messages and offer. These should align with your goals. The detail may vary slightly for each media, but your key messages should be similar.

Media 1

What is your offer? _____

How valuable is it for your target market? _____

What action do you want people to take after seeing your campaign? _____

_____

What content do you need to include in your campaign? _____

_____

What space is required for that content? _____

_____

Media 2

What is your offer? _____

How valuable is it for your target market? _____

What action do you want people to take after seeing your campaign? _____

_____

What content do you need to include in your campaign? _____

_____

What space is required for that content? _____

_____

Media 3

What is your offer? _____

How valuable is it for your target market? _____

What action do you want people to take after seeing your campaign? _____

_____

What content do you need to include in your campaign? _____

_____

What space is required for that content? _____

_____

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Step 7 – Project your campaign ROI

Create estimates for the response rate from your campaign, the ultimate conversion ratio from responses to customers, and total revenue generated from the campaign.

Estimate your response rate – the percentage of people that respond to your offer

Create a campaign funnel, eg an example funnel could look like this:

Example campaign funnel		
Projected campaign reach		4000
Click link to land on website	5%	200
Fill out information request form	15% (of the above 5%)	30
Attend open day	25% (of the above 15%)	8
Negotiate purchase	50% (of above 75%)	4
Become a customer		

Campaign funnel		

Estimate your total gross profit from the campaign. Ie, subtract the total cost of goods (from your new customers) from the total campaign revenue.

Subtract your campaign budget from the gross profit to calculate your net profit (ROI)

example

- Total cost of goods $1000
- Total campaign revenue $300000
- Campaign budget $5000

Gross profit 30000 – 1000 = 29,000

Net profit 29,000 – 5,000 = 24,000

Promotional Plan

Step 8 – Outline your follow up

Your follow up processes directly affect your conversion rate, so it is vital that you outline your requirements

How will your market respond to your campaign and what will your response to that be?

Example:

How does someone take advantage of your offer?

☐Inbound phone call

☐Take action on your website, a distribution partner's website or a social media page

☐Sends an email

☐Fills out and mail a reply card (BRC)

How do you respond to their action?

☐Process an order

☐Mail fulfillment

☐Email fulfillment

Additional processes to consider

☐Transition account to salesperson

☐Transition account to marketing

☐Follow up with non-responders

How does someone take advantage of your offer?	How do you respond to their action?	Additional processes to consider
Inbound phone call	Process an order	Transition account to salesperson
Take action on your website, a distribution partner's website or a social media page	Automated email response and/or mail out information pack	Transition account to marketing
Sends an email	Email response within 12 hours	Follow up with non-responders