

Step-by-Step Promotional Planning and Budgeting Guide

Promotional Themes

- Financial
- Safety
- Fitness
- Education
- Patriotic
- Recognition
- Hi-tech
- Sports
- Seasonal
- Motivation
- Cultural
- Fundraising
- Religious
- Outdoors
- On the Move
- Holiday
- Generational
- Health
- Spirit
- Business
- Mystery
- Traditional
- TV Shows
- Union
- Musical
- Internet
- Landmarks
- Hollywood
- Academia
- Performance
- Mythology
- Competition
- Events
- Artistic
- Cartoon
- Take Flight
- Medical
- Hobbies
- Mystical
- Sci-Fi
- Construction
- Network
- Community
- Travel
- Organize
- Gourmet
- Timely
- Modern
- Classic
- POP
- Essential
- Stress Relief
- Celebration
- Cyber
- Cool
- Rush
- Power
- Free
- Collectible
- Luxurious
- Kids' stuff

Event Description

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

Schedule:

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 morale/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 w/Purchase	<input type="checkbox"/> Cross/Up Sell
<input type="checkbox"/> Other		

Objectives

What are you trying to achieve?

- Present Customers
 Prospective Customers
 Employees
 Students
- Lost Customer
 Top Customers _____ %
- Job Function or Title _____

Prepared for:

Company: _____

Contact: _____

Phone: _____



Fax: _____

E-mail: _____

Audience Demographics

Income level _____

Geography _____

Age Range _____

Men Women

Other: _____

Audience Demographics

What major point do you want to communicate?

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

What are the copy limits, if any, you need to consider?

Theme

Does your promotion fit any theme? The list on page 2 may help you generate some ideas.

What is the theme of your promotion?

What is the best way to reach your audience?

- | | |
|--------------------------------------|--|
| <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"/> Aggressive |

Medium

What is the best way to reach your audience?

- | | |
|---|--|
| <input type="checkbox"/> Direct Mail | <input type="checkbox"/> Ceremonies |
| <input type="checkbox"/> Hand Deliver | <input type="checkbox"/> Trade Shows |
| <input type="checkbox"/> Phone Call | <input type="checkbox"/> Broadcast Advertising |
| <input type="checkbox"/> Internet Advertising | <input type="checkbox"/> Gift with Purchase |
| <input type="checkbox"/> Networking | <input type="checkbox"/> Bundled with product |

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?

- Envelope
- Cover letter
- Your catalog/brochure/flyer
- Another 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 | |

Calendar

	January S M T W T F S	February S M T W T F S	March S M T W T F S	April S M T W T F S	May S M T W T F S	June S M T W T F S	July S M T W T F S	August S M T W T F S	September S M T W T F S	October S M T W T F S	November S M T W T F S	December S M T W T F S
Order Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Logo and other Materials Due Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Delivery Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Drop Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Order Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Logo and other Materials Due Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Delivery Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Drop Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Order Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Logo and other Materials Due Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Delivery Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
Drop Date	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

Tip: Remember to allow for order processing, production time, artwork, proof approval and shipping time. Plan to place your order well enough in advance to meet your deadline.