



The Direct Marketing Campaign Planning Guide & Templates

Profits and Planning

Almost as much lip service is given to the critical importance of creating a direct marketing plan as the lip service traditionally accorded God, Motherhood, and the Boy Scouts. Yet, only a small percentage of the direct response programs produced each year are preceded by effective market planning. A pessimist might say that the marketing plan is your most effective tool to avoid disaster. A positivist might say that no other single factor has as much impact on your level of profit (or loss) as does the quality of the marketing plan.



Major Causes for “No Planning”

"If marketing plan development is of such critical importance, why do so few actually do it?" While the causes are legion, three major factors usually come into play. These are: 1) counterproductive top management pressure; 2) overloaded line operating staffs; and, 3) lack of overall experience in marketing strategy development.

Let's take top management pressure first. Usually it takes top management (or the owners in a medium size corporation or proprietorship) a long time to make up their minds to commit capital to a direct marketing program of any size or scope. Then, frequently, their correct understanding of the relationship between time and money causes them to impose program 'start deadlines' that force their people into implementation with too little (and sometimes no!) time allotted for marketing plan development.

Just as significant is the classic case of line management (or line marketing) personnel being overloaded with ongoing day-to-day operational activities. How many times have you heard line personnel say "Do you want me to plan it, or do it?", or "I'm surrounded by alligators and they want a plan to drain the swamp!" And in those instances where sufficient line operational time is available, those responsible for program implementation often have too limited a range of experience or knowledge to comprehensively develop a total marketing plan!

A recurrent example is the case of competent creative personnel who, while totally qualified to develop excellent direct mail packages, two minute TV solicitations, telephone sales scripts, radio spots, or direct response print space ads, really cannot create the marketing strategy that must be determined before their particular creative talents can profitably impact response levels. (It is not difficult to see when this has happened, because the creative aspects of the program usually 'ran away' with the total effort, resulting in artistic success and dismal marketing and business failure).

Enough.

If you are part of top management, do not impose deadlines on your people prior to making them specify the amount of time (both unit time, and chronological time) that they must have available to develop an in-depth plan. If you are one who must implement the program, resolve that you will hold up an "Emergency Stop Sign" in blazing red colors whenever you are asked to start a program for which no real marketing plan has been created.



DEFINING THE DIRECT MARKETING PLAN

It is important to define what is meant by a direct response marketing plan. Let us start with what a marketing plan is not: it is not simple listings of good ideas or tactics, media, lists, ads, copy approaches, layouts, etcetera. It is the written comprehensive and detailed product of direct marketing professionals engaged in creative problem solving, decision making, and specifying. Their product (the plan) identifies concrete strategy and corresponding direct response tactics developed to overcome specific obstacles that would otherwise block agreed-upon objectives.

This type of plan development, valuable to any form of marketing, is crucial in direct response marketing. Why? Because a direct marketer's most important resource is not the order, but the orderer; not the response, but the responder. Discovery, accumulation, retention, maintenance and retrievability of customer profiles and response history are the cornerstone of success in direct accurately defining customer profiles, searching out segments of the total potential customer base with similar characteristics, and then effectively soliciting and resoliciting these segments in order to maximize sales during responder life cycles.

PLAN SCOPE AND PROCESS

Various techniques can govern how the planning group and its individual members convene and interact, but no matter which is used, the sequence in which the subject matter is addressed should not vary.

A total view is necessary even if only one of many marketing projects is being addressed. Identification of each project's specific objective, market segment to be penetrated, and priority, is essential.

Whatever its complexity or size, the marketing plan approaches each project

or total program in a structured framework. The planning process should examine, in listed sequence, the following elements: background, objectives, obstacles, strategy, tactics, implementation timing and schedules, costs, yield levels, revenue potentials, profit and loss probability.

This logical structure allows a progression from identification and statement of problems through to their solutions with continual reference to cost and yield factors. The marketing plan can be brief or lengthy, but length is not the yardstick by which the plan is measured; whatever the length, each plan should be a comprehensive analysis of factors that are unique to the given situation, and their relationship to your total marketing effort.

This type of marketing plan provides the essential substructure for everything which follows ... the underlying strength for attaining the objectives established ... and the key to maximum profit.

PLAN CONTENT

Background

There is no such thing as too much background data—only too little. All information available, whether or not it appears to have immediate relevance, is gathered and organized from a marketing perspective. This includes, where possible:

- Customer profile(s)/buying history
- Buying process
- Product/service description and benefits
- Market position/sales history/competitive situation
- Marketing/advertising history
- Distribution and sales methods
- Manufacturing/marketing margins
- P & L history/potential

Only when the 'whole picture' is dissected and understood, can key relevant factors be isolated and dealt with.

Objectives

Expressing objectives in specific, meaningful terms is a difficult but critical part of marketing plan development. Generalizations such as "increase Profitability," "add sales dollars," "obtain leads," "build retail traffic," are not specific enough for direct marketing plan purposes.



Initial meetings should result in (1) making objectives more specific or precise, (2) quantifying objectives too generally stated, or (3) identifying additional objectives. Some practical examples ...

Industrial mail order-Eliminate 10% of current field sales calls by direct sale of low ticket product accessories to current customer base.

Fund raising-Upgrade previous donor contributions by \$10 per donor.

Business/Trade-Achieve 7% penetration of the existing national dealer network.

Consumer/Retail-obtain a minimum of 21,000 cases of 'first trial' sales for a new discount product during a 4-day introduction period at seven area stores.



Obstacles

Sometimes major obstacles are readily apparent, sometimes they are more obscure. The importance of identifying and relating all major obstacles that could block achievement of each stated specific objective cannot be over-emphasized. Continuing the previous examples ...

Industrial mail order-Individual buying influences at current customer site locations have not been isolated, identified, and computerized.

Fund raising-Previous donors do not now perceive the real effect of their donation in terms of its amount.

Business/Trade-The wholesaler network between manufacturing and dealer is dominated by a strongly entrenched competitor.

Consumer/retail--Current customer traffic automatically conceives of low price as synonymous with poor quality.

Strategy

Creation of the right strategy requires skillful decisions on:

- Program scope-test/rollout of full program
- Basic offer-product, incentives and premiums
- Concept and theme
- Versioning and/or personalization
- Media selection: Cost effective for the product and situation

Conceptual strategy (once developed with reference to all obstacles related to

each objective) must be stated in simple, specific language.

Industrial mail order--Create "Preferred Customer Status" category and associated benefits; communicate benefits and incentives to the manager in each current customer site in such a way that he will respond giving names, titles, and functions of all buying influences at the site.

Fund raising--Create unique, high-quality solicitation package for previous donors detailing emphatically what each \$10 segment of their total donation can result in for donation recipients.

Business/ Trade-Bypass existing wholesaler network with direct solicitation to dealers emphasizing extraordinary benefit of direct-from-manufacturer relationship.

Consumer/Retail-Establish product quality with six-day intensive multi-media saturation within 20 mile radius of each store during introduction. Augment with display materials and samples in stores.

Tactics

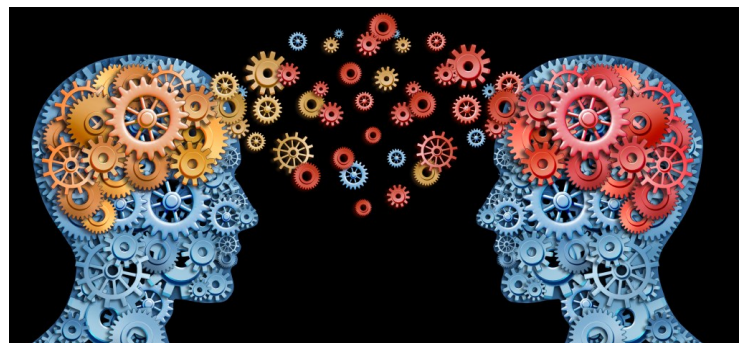
Specific tactics should only be addressed after background, objectives, obstacles, and strategic decisions have been made. Then details and specifications are developed as follows:

- Packaging: concept, components, copy, graphics
- Media Mix: direct mail, telephone, direct response space or broadcast, collateral, banner advertisements, e-mail, or a multi-media combination.
- Implementation specifications and procedures
- Timing/Scheduling
- Cost Estimates

Financial Analysis

All strategic and tactical decisions must be analyzed in terms of cost effectiveness, both before and after program implementation. To this end the marketing plan details:

- Breakeven calculations: Programs and life cycle



- Yield potentials: acquisition and life cycle at various response levels
- Specifications for response tracking, analysis, yield reports.

CRITERIA FOR PLAN CREATION

You can readily see, given the plan content just outlined, that it is not a project to be assigned a single person, no matter how talented or experienced. Clearly, plan development requires a number of differing functions, disciplines, and perspectives.

Consequently, top management must establish the criteria governing "How" the planning group is to develop the plan itself.

I recommend use of a master checklist to identify how the plan will be developed. Can you imagine a commercial airline pilot 'taking off' without having gone over his pre-flight and pre-takeoff checklist? While life or death is not at stake in marketing programs, in most cases a large amount of capital, human effort, and potential benefits for many are at stake. Subjecting your criteria to a pre-determined checklist of basics is clearly warranted.

What follows is not 'the' checklist to end 'all' checklists, but ten benchmark criteria I have found to be crucial for creating a marketing plan effectively.

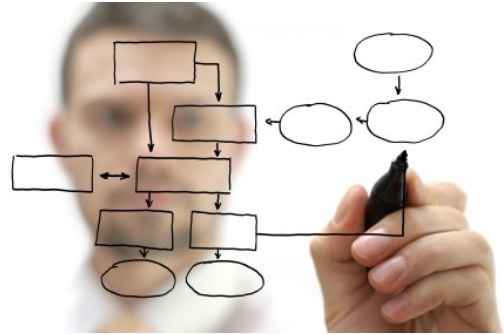
1. Task Method?
2. Involvement of All Direct Marketing Disciplines?
3. Job Captain?
4. Time Resources?
5. Written Format?
6. Planning Process?
7. Fail-Safe Data?
8. Predictive Yield Analysis?
9. Review, Study, Critique?
10. Freezing the Plan?

1. Did we use, and stick with, the task method?
Nearly everyone agrees with using the task method, but few actually do. The major reason given is, "Our budget is too small". The plain and simple fact is that even Fortune 500 companies do not have unlimited budgets. Available capital is nearly always a plan constraint. Contrary to conventional wisdom, this constraint is valuable, since it forces creativity in developing marketing strategy and tactics. In most instances, unlimited

capital (if it did exist) would create waste, poor decisions, and sloppy implementation.

So no matter how large or small the budget the task method should be used. First, determine the essential factors that must be addressed by your available money, time, skill, and conceptualize your strategies. Then, and only then, is it the right time to start modifying the program to make it fit the budget resource available. To do this you must:

- a. Prioritize everything you want to do in strict order of importance. This is an agonizing process, but it will enable you to eliminate those expenditures that are not absolutely essential to the first stages of your start up.
- b. Explore potential cost reductions via production technologies and efficiencies which may be available to you (and almost always are.)
- c. Examine your prioritized list to determine which tests are absolutely essential as first stage tests, and then make certain that you have specified the smallest test sizes that will be projectable. If, after all this attention to cost realities, you still have insufficient funding to implement all essential program elements, inform top management regarding how much of shortage there is, why additional capitalization is necessary, and seek alternate ways to get the monies needed. Undercapitalization of a marketing program-either a test program, or a total effort based on precedential information, will be as disastrous in direct marketing as undercapitalization is in any aspect of business.



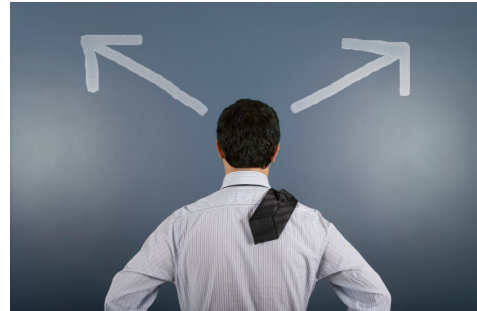
2. Have all major direct marketing disciplines participated in creating the plan?

I do not mean that every copywriter, sound mixer, graphic artist, assistant media analyst, data processing programmer, webmaster, or pressman should be involved. But I do mean that the head of each specialty function and discipline should be an integral part of the planning process. This includes internal functions like your marketing director, product managers, advertising director, data processing department head, plus external resources like account supervisor, account executive, creative director, graphic director, media manager, data processing specialist, etc. Realize that almost every marketing decision impacts creative, media, data processing, and every production area. Conversely, data processing or

production decisions can have a negative backlash effect on previously developed marketing or creative concepts. Given direct response marketing's steadily accelerating movement toward tighter and tighter customer profiles, plus offers and benefits that will be communicated to those profiles through multiple media, it is simply smart management to insure that all functions are fully involved in marketing plan decisions.

3. Have you established one final decision maker as a job captain responsible for overall development and completion of the marketing plan?

Given the necessarily different perspectives of each of your planning group members, it is critical that a 'Job Captain' be assigned and in control through out the entire planning process. Otherwise your group will create a camel instead of the horse you were trying to design. This Job Captain function should be assumed by a direct marketing generalist who comprehends each major direct response discipline from a conceptual standpoint. (Note: There will be, and should be, fundamental disagreement between group members on whether to take certain steps, or exactly how to implement them. If these disagreements do not occur, something is wrong with your group or your process.)



4. Has sufficient marketing plan development time been allocated for the planning group?

This subject has been discussed at length in the beginning of this essay. Suffice to say that each member of the planning group will have to 1) attend group meetings; and, 2) do individual work generated by decisions reached at those meetings. The number of hours required for group and individual activities should be estimated for each member, then integrated with their existing schedules, and a chronological lapse-time for plan completion established.

5. Has the entire marketing plan been committed to writing?

The importance of committing your marketing plan to writing cannot be overstressed. When studying it in written form, you and others who should read it will be surprised at the valid questions which evolve that did not occur (or simply were not asked) during the development decision-making process itself. Beyond this value of making you 'think it through again', the written plan can be reviewed by knowledgeable third parties who can then function as unbiased Devil's Advocates since they were not part of the plan

development. And, another major benefit is that the plan once written, becomes a 'control' tool throughout implementation.

6. Did you address major plan elements in strict sequence throughout the planning process?

Your planning groups' tendency, and greatest potential pitfall, will be 'to get ahead of itself'. Group members will constantly have to resist tactical discussion before strategy has been completed, strategy before objectives and related obstacles have been precisely identified and fully agreed upon, and so forth. (Note: While it is everyone's responsibility to stay 'in-sequence' the job captain has this responsibility as a prime function.)



7. Did we stop the planning process whenever essential data was not known?

While you will never have all the information you would like, you can often proceed with many data bits unknown. However, there is certain data that must be known, or you will be headed for disaster. These critical data elements generally are: customer profiles and buying history; the buying process itself; the prime benefit of your product or service; sales history, competitive situation, and market position; distribution and sales methods; manufacturing and marketing margins. Keep in mind that any given marketing situation may create additional critical information elements.

Stopping the market planning process does not mean 'scrapping' the project. It does mean getting the essential information needed. This information search need not necessarily be accomplished via formal research projects (mail or telephone research, focus group interviews, or direct marketing tests which provide response data, etc.) Often you can get the information you need by searching within your own organization. Talk to veterans in the company. Ask everybody to dig into those famous right hand drawers for previous memos, previous reports, 3/1 X 5/1 cards, or whatever. Talk to industry consultants who have motherlodes of case history information in their heads. Contact the DMMA Library/ Information Central in New York. Contact publications, or syndicators, or broadcast stations, for case histories on products or services that are similar to those you are offering (and have the same average order size, etc). In most cases you will be pleasantly surprised at how much information is available from sources like these. Of course, you will have

to organize it from a marketing standpoint, and then make interpretive judgments.

If, after all this effort, you still lack essential data, then you must build into your marketing plan the needed tests for formal research projects that must precede total implementation of your program. Keep in mind that nothing can be as costly to you as going ahead with deficient information in any of these key categories. You must discipline yourself to regard lack of essential information to be a deficiency that puts you into a crisis situation until you resolve it.

8. Did we complete predictive yield analysis and format our yield reports as an integral part of our written marketing plan?

To determine whether or not you will be able to accurately measure response and conversion, sales revenues, etc., format (content & sequence) your summary marketing yield reports. In some instances, your present data processing capabilities might not have been designed to record Recency/Frequency/Variety/Monetary statistics (or customer profile segmentation data), that are absolutely necessary for tracking response. The report formats will make your data processing people realize whether or not systems or programming work is required before response starts coming in. You may also have to orient personnel to new procedures and reporting techniques they have not dealt with in the past.



Once you have your report formats specified in terms of content and sequence, you should compute your numbers based on minimum and maximum expected yields (acquisition and life cycle) to backcheck the risk level based on estimated program costs.

9. Has each individual involved in creating the plan (plus some who were not) reviewed, studied, and critiqued the entire written plan?

Once your plan has been completed, the Job Captain should be responsible for having it committed to writing by a direct marketing generalist who has been totally involved in the planning process from inception. This written document should be distributed to all who were involved in the plan development, as well as some knowledgeable third parties who were not. All recipients of the plan should be given adequate time not only to

read it, but also to study and critique it.

10. Did we meet, as a group, for final review and agreement on the entire plan?

Prior to freezing the plan and starting implementation the group who reviewed the plan must meet for a final discussion and consensus approval of all plan elements. At the end of this meeting, plan modifications should be written into the plan and implementation begun at this time. It is important to make the decision that the plan is 'frozen', and no changes to essential factors will be allowed short of reconvening all involved parties.

This policy regarding change of essential plan elements does not mean that practical changes for production reasons, deadlines, surprises, etc., cannot be implemented during your start up. Flexibility must be allowed line managers and marketers implementing any given marketing plan. However, sound discretionary judgment is absolutely required to determine whether or not an essential component, or a non-essential component, of the plan is being changed. For example, any change to the basic offer is an essential change and should not be within the discretionary power of any individual. Just as obviously, substitution of paper stock is a decision that should be within the province of graphics, creative and printing directors.

SUMMARY

To sum up, effective direct marketing plan creation affects your profit more than any other single factor. Consequently, your organization must force itself to provide adequate time, money, and personnel to develop thorough, written direct marketing plans by means of the task method. Top management should establish criteria governing how the plan is to be created, and then insure that each specialist on the planning group (which is always to be headed by an experienced direct marketing generalist) be made aware of the ground rules for plan development. The plan, throughout its development and also when complete, is to be subjected to predictive yield analysis in order to identify the risk quotient. The completed, written plan is to be critiqued by all planning team members, as well as knowledgeable third parties. Once this group has met and frozen the plan, major changes can be made only by reconvening the planning group to analyze the impact of those changes, and approve changes. During implementation, marketing plan specifications govern the program .


About DWS Associates

Founded in 1982, DWS Associates is a full service marketing firm that develops and implements multi-channel marketing programs for organizations targeting business-to-consumer and business-to-business audiences in global markets. Our focus is on data-driven, innovative lead generation, lead nurturing, retention, and referral programs that attract, engage and retain profitable customers. Our staff is highly experienced in market research, competitive intelligence, business intelligence and analytics, strategic planning and campaign management - so we help you increase sales and marketing performance while building strong, unique, differentiated brands.

Services

- SalesGen2020 - Demand Generation & Lead Management Services
- Competitive Analysis & Market
- Opportunity Assessment Services and Software
- Digital - Social Media Consulting
- Strategic Marketing Consulting Services
- Direct Marketing Consulting Services
- Market Research Data-Driven Marketing and Analytical Consulting Services
- Marketing Applications and Tools Design Services

See more at: <http://bit.ly/dws-services>



Direct Marketing Campaign Planning Template

Published By: DWS Associates
(651) 315-7588

© Copyright 2014, All Rights Reserved



Use this guide and template to plan your direct marketing campaign, which may include one or more tactics or be a fully integrated direct marketing campaign. Each section includes instructions to guide you through the planning process and details each aspect of the campaign. This guide walks you through every step of direct marketing campaign planning, development and execution.

Direct Marketing Campaign Planning Guide

DIRECT MARKETING CAMPAIGN NAME:
<ul style="list-style-type: none">• <i>Enter campaign name.</i>
CAMPAIGN LAUNCH DATE:
<ul style="list-style-type: none">• <i>Enter launch date for campaign.</i>
CAMPAIGN END DATE:
<ul style="list-style-type: none">• <i>Enter end date for campaign.</i>
CONTACT NAME:
<ul style="list-style-type: none">• <i>Enter name(s) of primary contact(s) for campaign.</i>
PHONE:
<ul style="list-style-type: none">• <i>Enter phone number(s) of primary contact(s).</i>
EMAIL:
<ul style="list-style-type: none">• <i>Enter email address(s) of primary contact(s).</i>
BACKGROUND:
<ul style="list-style-type: none">• <i>This is a summary of where your company is and why?</i>• <i>What is the company's situation and reason for running this campaign?</i>• <i>What are the market conditions affecting your company?</i>• <i>Who are your competitors and where does your company rank in the competitive spectrum?</i>• <i>Where are your products and services in the product life stage cycle: entry, growth, mature, declining?</i>• <i>How are your company and your products and services positioned in the marketplace?</i>• <i>What are the characteristics of the end users of your products and services?</i>
SOLUTION, PRODUCT OR SERVICE DESCRIPTION:

<ul style="list-style-type: none"> Describe the solution, product and/or services being promoted in this campaign.
MARKET DEFINITION:
<ul style="list-style-type: none"> Describe the characteristics of the market that the company's solutions, products/services are intended to address through this campaign.
MARKET TRENDS:
<ul style="list-style-type: none"> What technology, economic, environmental, political, legal changes, etc., are taking place in the market that may be influential or important in terms of their impact on the customer's buying decision to purchase from your company?
COMPANY MARKET POSITION:
<ul style="list-style-type: none"> Give a description of your company's position relative to important competitors.
SOLUTION (PRODUCT / SERVICE) MARKET POSITION:
<ul style="list-style-type: none"> Give a description of your company's solution, product or service market position relative to those of your primary competitors.
COMPETITIVE TRENDS:
<ul style="list-style-type: none"> What kinds of competitive trends are taking place in the market that may impact your business and this campaign?
COMPETITIVE POSITIONING:
<ul style="list-style-type: none"> What differentiates your company from its major competitors?
TARGET MARKET(S):

- Describe the main characteristics of the group of potential buyers.
- What are the primary and secondary target markets for this campaign?
- Describe the industry segments and company size (revenue or employee size, if you are a business-to-business marketer.
- Describe the demographics if your target markets are consumers?)

TARGET AUDIENCES:

- For the target markets, describe who are the decision makers and influencers, either internal to the company or external to the company who play a role in or have an impact on the decision to purchase from your organization.
- If your organization markets directly to consumers, describe who the decision makers and influencers are. Internal could be family members, close friends, etc.,
- External consumer influencers could be publications, public figures, viral web, etc.
- Below, quantify the number of contacts for the campaign.
- If this is a business-to-business campaign, list the functional titles.

Business to Business

Total Quantity	Enter number
Number of enterprises	Enter number
Number of establishments	Enter number
Number of contacts per establishment	Enter number
Functional titles being targeted (e.g., CEO, CMO, COO, CFO, VP Marketing, VP Sales, VP Engineering, etc.)	Enter position titles

Consumer

Total Quantity	Enter number
Number of segments	Enter number
Segment names / descriptions	Enter names

TARGET AUDIENCES' PERCEPTIONS:

- What are the target audiences' perceptions of your organization and the products/services being offered in this campaign?
- What are their key issues?
- What advantages and disadvantages do your company and the product/service being advertised have in the customers' eyes?
- Why would the target audience buy from your company and buy this product/service?

- *What are the key decision criteria used by your target consumer to make a purchase decision?*

CONSTRAINTS/CONCERNS:

- *What factors or constraints may have an impact on the success of the campaign?*
 - *These may be internal or external.*
 - *Internal factors may be company policies, staffing, etc...*
 - *External factors could be legal, etc.*
- *What actions can be taken to minimize or limit the impact of these constraints or concern?*

CAMPAIGN TYPE: (Check one.)

<input type="checkbox"/>	<p>Single Tactic</p> <p>(A "tactic" is a single event, call, mail piece, email message, etc. A tactic is intended to build immediate results.)</p>
<input type="checkbox"/>	<p>Marketing Program</p> <p>(A "marketing program" is made up of single tactics. These tactics are integrated and sequential and move the target customer through the buying cycle, usually focusing on a single product or service. A "marketing program typically runs 2 to 6 months from initial planning to execution. A marketing program is a set of integrated tactics.)</p>
<input type="checkbox"/>	<p>Integrated Marketing Campaign</p> <p>(A "marketing campaign" is made up of sequential targeted marketing programs that move a defined customer set through the entire buying cycle identifying their wants and needs from a solution perspective (integrating multiple products and services). A marketing campaign is made up of integrated marketing programs that can run from 12 to 18 months from planning through execution.)</p>

CAMPAIGN DESCRIPTION:

- *Describe in general terms the type of campaign that is being proposed.*
- *Is it an integrated campaign?*
- *What types of media will be involved?*
- *Will it involve 'calls-to-action' and offers to drive prospect response?*
- *What will be the focus?*
- *What is it supposed to communicate to the various audiences?*
- *Will it involve fulfillment kits, white paper, etc.?*
- *Is it a 'push' or 'pull' or combination 'push-pull' campaign?*

- *Will there be a contest, free giveaways?*
- *Any other general details about the campaign.*

CAMPAIGN OBJECTIVES:

- *What objectives are you trying to achieve by running this campaign?*
 - *Increase awareness?*
 - *Drive sales?*
 - *Drive multi-channel retail traffic; generate inquiries or leads; or, some combination of these?*
 - *Your objectives should be quantifiable and measurable.*
- *What action do you want the advertising to persuade the audience to take?*

☐ Revenue

☐ Inquiries (building a database, fostering relationships, driving traffic to a storefront or website, etc.)

☐ Qualified leads

☐ Awareness

CAMPAIGN STRATEGIES:

- *Describe the variety of campaign techniques that will be used in order to accomplish the objectives.*

KEY MESSAGES:

- *What is the overall positioning of the campaign to the customer?*
- *What are the key messages that you want this advertising to communicate?*
 - *About your company?*
 - *About your service?*
 - *About the product/service being advertised?*
- *What benefits, both product and those related to the customers purchasing from your company, do you want to communicate?*

CALLS TO ACTION / OFFER STRATEGY:

- *What factors constitute the offer?*
 - *The product/service?*
 - *Any support provided to the buyer?*
 - *Credit and other terms offered to the customer who makes the purchase?*
 - *What kinds of incentives are offered to spur the purchase?*
 - *What kind of time constraints or time limits are part of the offer?*
- *What does the buyer have to do and when to take advantage of the offer?*
- *How does the offer compare to those being made by the competition? How is the audience likely to respond to the offer?*
- *Has the offer been tested and validated prior to this campaign?*

CAMPAIGN TACTICS:

- *Give a general overview of the various tactics that will be used as part of this campaign.*

CAMPAIGN ELEMENTS: (Check all that apply.)

<input type="checkbox"/>	Market research
<input type="checkbox"/>	Market segment study
<input type="checkbox"/>	Competitive analysis study
<input type="checkbox"/>	Market opportunity assessment study
<input type="checkbox"/>	Focus groups
<input type="checkbox"/>	In market product / pricing testing
<input type="checkbox"/>	In market advertising testing
<input type="checkbox"/>	Site selection study
<input type="checkbox"/>	Traffic study (outdoor advertising)
<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>	Print Advertising
<input type="checkbox"/>	Newspaper
<input type="checkbox"/>	Magazine
<input type="checkbox"/>	FSI (free standing insert)
<input type="checkbox"/>	Bound-in insert
<input type="checkbox"/>	Supplement
<input type="checkbox"/>	Directories
<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>	Direct Mail
<input type="checkbox"/>	Solo mailer
<input type="checkbox"/>	Multi mailer (multiple products on individual flyers in single envelop)
<input type="checkbox"/>	Card deck
<input type="checkbox"/>	Coupon deck
<input type="checkbox"/>	Catalog
<input type="checkbox"/>	Package Insert
<input type="checkbox"/>	Newsletter
<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>	Broadcast
<input type="checkbox"/>	Commercial TV

<input type="checkbox"/>	<input type="checkbox"/>	Commercial radio
<input type="checkbox"/>	<input type="checkbox"/>	Satellite radio
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>		Telemarketing
<input type="checkbox"/>	<input type="checkbox"/>	Inbound telemarketing – lead generation
<input type="checkbox"/>	<input type="checkbox"/>	Outbound telemarketing – lead generation
<input type="checkbox"/>	<input type="checkbox"/>	Outbound telemarketing – contact discovery
<input type="checkbox"/>	<input type="checkbox"/>	Outbound telemarketing - profiling
<input type="checkbox"/>	<input type="checkbox"/>	Telesales
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>		Internet (Electronic)
<input type="checkbox"/>	<input type="checkbox"/>	Email
<input type="checkbox"/>	<input type="checkbox"/>	Email newsletter
<input type="checkbox"/>	<input type="checkbox"/>	Website
<input type="checkbox"/>	<input type="checkbox"/>	Micro website / landing page
<input type="checkbox"/>	<input type="checkbox"/>	Banner ad
<input type="checkbox"/>	<input type="checkbox"/>	Blog
<input type="checkbox"/>	<input type="checkbox"/>	YouTube (web video)
<input type="checkbox"/>	<input type="checkbox"/>	Social media (LinkedIn, MySpace, Facebook, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	eBay, Amazon, etc.
<input type="checkbox"/>	<input type="checkbox"/>	Twitter
<input type="checkbox"/>	<input type="checkbox"/>	SMS Text Messaging
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>		Outdoor Transit Advertising
<input type="checkbox"/>	<input type="checkbox"/>	Billboards
<input type="checkbox"/>	<input type="checkbox"/>	Bus Posters
<input type="checkbox"/>	<input type="checkbox"/>	Mobil billboards
<input type="checkbox"/>	<input type="checkbox"/>	Airport advertising
<input type="checkbox"/>	<input type="checkbox"/>	Outdoor posters
<input type="checkbox"/>	<input type="checkbox"/>	Subway posters
<input type="checkbox"/>	<input type="checkbox"/>	Transit shelter posters
<input type="checkbox"/>	<input type="checkbox"/>	Outdoor bulletins
<input type="checkbox"/>	<input type="checkbox"/>	Street furniture
<input type="checkbox"/>	<input type="checkbox"/>	ATM advertising
<input type="checkbox"/>	<input type="checkbox"/>	Blimps
<input type="checkbox"/>	<input type="checkbox"/>	Elevator advertising
<input type="checkbox"/>	<input type="checkbox"/>	Restroom advertising
<input type="checkbox"/>	<input type="checkbox"/>	Car / truck wraps
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>		Sales Promotion
<input type="checkbox"/>	<input type="checkbox"/>	Event
<input type="checkbox"/>	<input type="checkbox"/>	Conference
<input type="checkbox"/>	<input type="checkbox"/>	Trade Show
<input type="checkbox"/>	<input type="checkbox"/>	Seminar
<input type="checkbox"/>	<input type="checkbox"/>	Webinar
<input type="checkbox"/>	<input type="checkbox"/>	Teleconference
<input type="checkbox"/>	<input type="checkbox"/>	Product promotion
<input type="checkbox"/>	<input type="checkbox"/>	Contest / Sweepstakes
<input type="checkbox"/>	<input type="checkbox"/>	Coupons
<input type="checkbox"/>	<input type="checkbox"/>	Advertising Support Programs (Cooperative Advertising)

<input type="checkbox"/>	<input type="checkbox"/>	Short Term Allowances
<input type="checkbox"/>	<input type="checkbox"/>	Sales Incentives or Push Money (Spiffs)
<input type="checkbox"/>	<input type="checkbox"/>	Coupons
<input type="checkbox"/>	<input type="checkbox"/>	Rebates
<input type="checkbox"/>	<input type="checkbox"/>	Promotional Pricing
<input type="checkbox"/>	<input type="checkbox"/>	Trade-In
<input type="checkbox"/>	<input type="checkbox"/>	Loyalty Programs
<input type="checkbox"/>	<input type="checkbox"/>	Sampling and Free Trials
<input type="checkbox"/>	<input type="checkbox"/>	Free Product
<input type="checkbox"/>	<input type="checkbox"/>	Premiums
<input type="checkbox"/>	<input type="checkbox"/>	Demonstrations
<input type="checkbox"/>	<input type="checkbox"/>	Personal Appearances
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>	<input type="checkbox"/>	Alternate Media
<input type="checkbox"/>	<input type="checkbox"/>	CR-ROM
<input type="checkbox"/>	<input type="checkbox"/>	Fax
<input type="checkbox"/>	<input type="checkbox"/>	Public Relations
<input type="checkbox"/>	<input type="checkbox"/>	Press Release
<input type="checkbox"/>	<input type="checkbox"/>	Media Relations
<input type="checkbox"/>	<input type="checkbox"/>	Media Tours
<input type="checkbox"/>	<input type="checkbox"/>	Annual Report
<input type="checkbox"/>	<input type="checkbox"/>	Organization Backgrounder
<input type="checkbox"/>	<input type="checkbox"/>	Newsletter
<input type="checkbox"/>	<input type="checkbox"/>	Special Events
<input type="checkbox"/>	<input type="checkbox"/>	Speaking Engagements
<input type="checkbox"/>	<input type="checkbox"/>	Sponsorships
<input type="checkbox"/>	<input type="checkbox"/>	Employee Relations
<input type="checkbox"/>	<input type="checkbox"/>	Community Relations
<input type="checkbox"/>	<input type="checkbox"/>	Philanthropy
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>	<input type="checkbox"/>	POS (Point of sale displays, signage)
<input type="checkbox"/>	<input type="checkbox"/>	Personal Selling
<input type="checkbox"/>	<input type="checkbox"/>	New Business Development
<input type="checkbox"/>	<input type="checkbox"/>	Account Management
<input type="checkbox"/>	<input type="checkbox"/>	Order Taking
<input type="checkbox"/>	<input type="checkbox"/>	Sales Support
<input type="checkbox"/>	<input type="checkbox"/>	Other (describe):
<input type="checkbox"/>	<input type="checkbox"/>	Data Build
<input type="checkbox"/>	<input type="checkbox"/>	Collect contact data from internal resources
<input type="checkbox"/>	<input type="checkbox"/>	Receive contact data from external resources
<input type="checkbox"/>	<input type="checkbox"/>	Purchase data from external resources
<input type="checkbox"/>	<input type="checkbox"/>	Purchase data overlays (psychographic, demographic, SIC, purchase behavior, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	Database cleanup
<input type="checkbox"/>	<input type="checkbox"/>	Other
Notes		
MEDIA STRATEGY / CIRCULATION STRATEGY:		

- *From the checklist above, elaborate on the campaign elements that will be used and how they will be used.*
- *Identify the specific lists and/or media placements that may be used in the campaign.*
 - *Lists should include company internal as well as possible purchased lists and/or overlay data. Includes a summary description of each list and/or recommendations.*
 - *For lists, identify the list name/source, selection criteria, estimated name universe based on selection criteria, estimated order quantity, estimated net quantity, list cost per thousand (CPM) and total list rental cost.*
 - *For print or other media, should include name/source, expected audience, cost per placement, number of placements, applicable discounts and total cost.*

CREATIVE / FORMATS STRATEGY:

- *Describe the creative objectives, creative strategy, buyer perceptions/barriers to overcome, critical sales messages, and design direction for all deliverables.*
 - *The creative objectives outline what the creative work is supposed to deliver.*
 - *The creative strategy describes the main ways the creative is supposed to accomplish the objective.*
- *Creative work needs to address anticipated barriers and negative buyer perceptions as part of the message content.*
- *What tone and manner should be used to talk to the audience?*
- *What will be the look and feel of the campaign?*

CAMPAIGN FORECASTS:

- *What are the projected results of the campaign?*
- *What are the projected response rates?*
- *What are the expected conversion rates from leads to sales?*

TOTAL BUDGET:

- *Provide a summary of the total budget allocated for this campaign, including materials, creative, production, and media. Also include any other costs such as sales promotion, public relations, event and event supporting costs.*

CAMPAIGN IMPLEMENTATION:

- Address these issues as they affect campaign implementation: media and list acquisition; response handling; in-bound and out-bound call handling, external resource identification and contracted support, prospect database, and fulfillment.

CAMPAIGN TIMING: (Critical Dates and Dependencies)

- *List all critical dates that affect campaign implementation and execution.*
 - *What is the desired delivery date to the marketplace?*
 - *When does data work to support the campaign have to be completed?*
 - *When do insertion and list orders have to be placed?*
 - *When do sales scripts for telemarketing resources have to be completed?*
 - *When does training of all sales resources have to be completed?*
 - *When does inventory to support the campaign have to be delivered to the channel or available for shipment to customers from inventory?*
 - *When do orders for products have to be placed?*
- *Develop a separate campaign calendar to support this document.*

DATABASE AND LIST MANAGEMENT STRATEGY/REQUIREMENTS:

- Specify the database procedures for the campaign: lists of script codes, activity codes, when and how to use codes. Specify the source of data for the campaign.
- Will it come from external sources or internal sources or a combination of both?
- Do target customers/accounts/contacts already exist in the CRM and SFA systems or is some data importation required?
- If outside data is acquired, are there contracted limits on how the data can be used?
- Can the external account data be loaded into your existing database systems or will alternate databases be required?
- Is some contact discovery required?
- Is a pre-call required to gather any required data for the campaign?
- What are the selection criteria?
- How will overlay data be used?
- Develop activity/source codes and "campaign" key codes.
- Determine the current buyer profile to make sure they match the target audience profile.
- Determine what kinds of segmentation techniques will be applied to the data based on the type of campaign and overall campaign objectives.
- Will data be flagged to include interest tags and suppress names?
- Does all of the required product information appear in the CRM / SFA databases or does some data need to be entered or is another source required?
- How will contacts or accounts that express no interest be handled in subsequent tactics?

- *Will codes be assigned to them to exclude them from future tactics in this campaign?*

POST CAMPAIGN ANALYSIS:

- *Specify the criteria for campaign success (# of sales, # of inquiries, # of leads, # of qualified leads, # of clicks, revenue, and qualification criteria). Where will measurement components come from? Specify the techniques for obtaining information for reporting results of the campaign. Techniques might include: actual counts, customer or market surveys, data from order entry system, etc.) Evaluate actual performance against pre-established metrics for the campaign:*
 - *# contacts, # responses, response rate*
 - *Cost per contact*
 - *Cost per response*
 - *Leads*
 - *# generated*
 - *# qualified*
 - *# closed*
 - *% leads vs. planned target*
 - *Cost per lead*
 - *Response to qualified lead rate*
 - *Lead conversion rate*
 - *Revenue per close*
 - *Awareness, attitudes, usage (attitudinal) shifts*

RESPONSE METHOD AND HANDLING:

- *Describe how the customer responds to the offer and how the responses will be handled as they are received.*

LEAD MANAGEMENT SUMMARY:

- *Develop detailed lead plan.*
 - *The lead plan should show the migration through the lead sales cycle, appropriate hand-offs, anticipated lead flow through the various campaign tactics, etc.*
 - *Who will touch the leads?*
 - *Where will they go?*
 - *Who's responsible for them?*
 - *How will leads and lead status be reported?*

Lead hand-off identification Criteria used to classify leads according to lead status.				
Qualified Lead description:				
<ul style="list-style-type: none"> Describe the characteristics of a qualified lead for this campaign. 				
Lead Phase (Use your definitions for the lead phase and the identification criteria you use to describe that phase.)		Lead Phase Identification Criteria		
1	Inquiry			
2	Lead			
3	Qualified lead			
4	Opportunity			
5	Qualified opportunity			
6	Proposal			
7	Demonstration			
8	Close			
Action Summary Description of required actions, responsibilities, and timeframes.				
Communications vehicle: <input type="checkbox"/> CRM systems <input type="checkbox"/> Email <input type="checkbox"/> Paper Forms <input type="checkbox"/> Other				
Hand-off Phase	Action Taken	Responsibility	Lead Recipient	Timeframe

Feedback Requirements

Description of feedback content, timing, and recipients for each lead phase.

Communications vehicle: ☐ CRM systems ☐ Email ☐ Paper Forms
☐ Other

Hand-off Phase	Information Required	Lead Frequency	Recipient

CAMPAIGN FULFILLMENT AND OPERATIONAL REQUIREMENTS:

- *What is the fulfillment plan for the campaign and what fulfillment actions need to take place?*
- *How will the various types of responses (email, website, fax, telephone, business reply cards, etc.) to the campaign be treated?*
- *How will entry of responses into the marketing and sales databases (CRM system) be handled.*
- *Describe the database programming requirements for the campaign.*
- *Describe the lead management coding process for follow up contact.*
- *What types of marketing collateral needs to be inventoried to send to customers, sales executives, etc.?*
- *What will be sent to respondents?*
- *How will fulfillment of these materials be handled?*
 - *Internal or external resources?*
- *What are the guidelines for delivery of marketing materials and products?*
- *How will in-bound order processing be handled?*
- *Training process for all customer touch point areas (sales, customer service, etc.)*

NOTES:

- *Use this space to enter any notes relevant to campaign planning, implementation, and or execution.*





LEAD PROJECT WORKSHEET:

[illegible]