

PROMOTIONAL • CAMPAIGN • CHECKLIST

Date: _____

Client: _____

OBJECTIVE

1. What is your objective(s)? That is, what do you want the marketing piece to do for you? Please be specific.

(Check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Get your name out there | <input type="checkbox"/> Solicit a call |
| <input type="checkbox"/> Educate about our service(s) | <input type="checkbox"/> Share new product idea |
| <input type="checkbox"/> Sell the specific product that is being sent out | <input type="checkbox"/> Customer appreciation |
| <input type="checkbox"/> Generate sales leads | <input type="checkbox"/> Generate referrals |
| <input type="checkbox"/> Warm up a cold call/open doors | <input type="checkbox"/> Create goodwill/enhance image
(create a positive attitude/feeling towards you/company) |

Other (be specific): _____

2. What is the main message you want to convey? _____

TARGET AUDIENCE

3. Who, specifically, is your target audience? That is, who do you want to influence with your promotion?

- Current customers
- New prospects or revive old client(s)
- Industry: _____
- Department(s): _____
- Geographic location(s): _____
- Size of company: _____
- Demographic profile of recipient: Age Group(s): _____ Gender: _____
- Lifestyle profile: conservative trendy

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4. How many people do you want to reach with this promotion?_____

5. Do you have a target list for this marketing piece (with contact names and addresses)?

Yes

No _ How are you going to generate your target list?_____ SKIP TO QUESTION 8

6. How did you generate your target list?_____

7. How many contacts are on your list?_____

PRODUCT AND PACKAGING

8. Your ideas for themes that best fit your objective(s):_____

9. Your ideas for product(s) that will most impact your target group and meet your objective(s).

Please list item and explain why this is a good fit.

Product name:_____ Item #:_____ Why is this item a good fit?_____

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10. Your ideas for packaging:_____

Product name:_____ Item #:_____ Why is this item a good fit?_____

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DISTRIBUTION

11. How will you reach your target audience?

- Mail
- Personally deliver
- E-mail
- Other (specify):

12. What is your timeframe to implement this piece?_____

BUDGET

13. How much are you willing to spend per person for this promotion?_____

BUDGET

14. How will you follow up with your target audience?_____

15. How will you measure the success of the project?_____

16. What do you like in a supplier?_____

17. What do we need to do to secure future orders?_____