

Promotion Plan Worksheet



PROMOTION PLAN WORKSHEET

Project Name: _____

Today's Date: _____ Planned Promotion Date(s): _____

Brief Description of Objective(s): _____

Complete only those areas which are applicable to your promotion.

1 PRODUCT(S) EMPHASIS

PRODUCT(S)	TOTAL UNIT GOAL	TOTAL \$ GOAL
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2 TARGET MARKET

- Existing Clients (Specify _____) Non-Clients
- Demographics (Identify those that are appropriate) _____
- Combined household income level: \$ _____
- Ethnicity (if applicable): _____
- City and/or zip code(s) or census tract: _____
- Age range: _____ Gender: _____ Psychographics/Lifestyle: _____
- Homeowners (\$ _____ assessed value; _____ yrs. residency; _____ % LTV; _____ % current mortgage)
- Other: _____

3 COMPETITIVE ADVANTAGE/BENEFIT/SPECIAL FACTORS

	DESCRIPTION
<input type="checkbox"/> Competitive pricing rates:	_____
<input type="checkbox"/> Low fee/no service charge:	_____
<input type="checkbox"/> Speed of service processing:	_____
<input type="checkbox"/> Unique product or service feature:	_____
<input type="checkbox"/> Event:	_____
<input type="checkbox"/> Other:	_____

4 MEDIA

POINT-OF-SALE MATERIALS

		QTY.	SIZE
Posters:	<input type="checkbox"/> Easel Back <input type="checkbox"/> Lobby Display <input type="checkbox"/> Other: _____	_____	_____
Banners:	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	_____	_____
Buttons:	<input type="checkbox"/> Adhesive <input type="checkbox"/> Pin-Backed	_____	_____
Flyers:	<input type="checkbox"/> Flat <input type="checkbox"/> Folded	_____	_____
<input type="checkbox"/> Counter Card/Tent Cards <input type="checkbox"/> Window Graphics		_____	_____
<input type="checkbox"/> Other: _____		_____	_____

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PRINT ADS

Publication: _____ Frequency of Publication: _____

Insertion Dates: _____ Length of Run: _____

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Insertion Dates: _____ Length of Run: _____

DIRECT MAIL

All names that meet target criteria

Maximum Quantity: _____

EXECUTION

ELEMENTS

Statement Insert

Copy/Design

Postcard

Application (New Accounts)

Self-Mailer

Business Reply Mail (for response)

Direct Mail Letter

Tear-off Coupon (with special offer)

TELEMARKETING

Branch Office

Corporate Call Center Estimated # of calls: _____

Script needed

Prospect List needed

EXHIBIT

Trade Show

Employee Group

Community Event Description: _____

ELECTRONIC

Web Banner Ads

Email

Other: _____

Television

Radio

Social Media Sites

Purls

PUBLIC/COMMUNITY RELATIONS

Press Release: Announcing event/activity Announcing product/service

Sources to notify: _____

5 ADDITIONAL NEEDS

NOTES/SKETCHES

