

PLANNER WORKSHEET

USE THIS WORKSHEET TO **TARGET, PLAN AND ORGANIZE YOUR PROMOTION**

1. Target Objective

Your promotion may be aimed at a single objective—or many objectives. No matter, as long as you know what those objectives are. And settling on an objective is the first important step in your personal promotion. We have put together, for your benefit, a large enough list for you to at least start the wheels rolling—to enable you to zero in on those that most closely match your specific situation.

- Motivating salespeople
- Improving employee morale
- Helping consumers use product correctly
- Increasing dealer orders
- Encouraging more frequent use of product
- Increasing trade show traffic
- Promoting brand recognition
- Introducing new products or services
- Attracting new generation of buyers
- Developing corporate image
- Improving client or customer relations
- Promoting new facilities
- Introducing new salespeople
- Opening new accounts
- Announcing special sale
- Inviting the people to hospitality suite or cocktail party
- Welcoming new employees
- Welcoming stockholders
- Welcoming members
- Welcoming board of directors
- Introducing new use or application for existing product
- Announcing new technique
- Announcing new business opening
- Announcing new patent
- Announcing name or name change
- Announcing new packaging

- Announcing rebate program
- Educating present or prospective buyers
- Reactivating accounts
- Providing salespeople with new sales
- Enhancing advertising in other media
- Promoting employee safety
- Increasing unit of sale
- Others

2. Target Group

Who do you want to influence? Here you are faced with the choice of another target. And it's an important target because *one campaign rarely influences everybody*. And one promotional product may not necessarily hit the target for all groups, though many do have "universal appeal."

- Present customers
- Prospective customers
- Salespeople
- VIPS
- Employees
- Reps
- Dealers
- Managers
- Branch offices
- Children
- Teenagers
- Men
- Women
- Husbands
- Wives
- Singles
- Adults
- Senior citizens
- White collar workers
- Blue collar workers
- Professionals (name)
- Business owners
- Opportunity seekers
- Ethnic, racial or religious groups (name)
- High income
- Middle income
- Low income
- Others

3. Scope

How wide an area do you want your promotion to reach? Because tastes vary by region, this can be a critical consideration in any of your campaigns. If your intention is to hit the widest possible area, you will want to determine whether you want to do so with one campaign or several split up by area.

- Local
- Regional
- National
- Neighborhood
- International

4. Target Numbers

Based on the scope of your promotion, you will want to be certain as to the number of people who are to receive it. How many people do you want to reach with this promotion?

5. Dollars/Budget

Now it's budget time. In view of each of the proceeding points, how much do you want to spend per person reached by this promotion?

\$ _____ maximum

\$ _____ minimum

6. Theme

Let your imagination run free. And remember, "theme" is not always the same as "objective." Your objective may be simply to increase sales or create goodwill, but you may choose a special Christmas bonus on holiday travel as the theme.

Again, there are so many possibilities that it is impossible to list all of

them here. Let's start with some of the most commonly used themes:

holidays, special days, etc.

New Years Day
Chinese New Year
Valentine's Day
Mardi Gras
St. Patrick's Day
Mother's Day
Memorial Day
Father's Day
Independence Day
Labor Day
Thanksgiving
Christmas/Chanukah
Secretary's Day
Nurse's Day

Consider running reverse holiday celebrations similar to "Christmas in July." Or, consider your *own* holidays like:

Founder's Day
(Your own name) Day
Your own company anniversary
Serve your community Day
Others

7. Message (Imprint)

Here, you will want to be careful not to "load" a small space with too much information. If in doubt, it is usually wiser to say less than more. At times, the simple illustration and a couple of words is sufficient. At other times, copy alone is best. Either way, this is one more vital consideration in your campaign.

Name of your company
Name of individual receiving item.
Special Message
Photo of product, yourself,
salesperson, company, etc.
Company slogan
Company logo
Special telephone number
Other information

8. Fad & Current Events Tie-ins

They're as varied as their origins. Some come and go quickly and others establish themselves firmly in the fabric of our everyday lives. Depending on the preceding elements which you checked, you may want to latch onto a fad or a trend with far-reaching significance. Either way, you may want to take each into consideration as a possible tie-in for your campaign.

Air Pollution
Budget Trimming

Computer advertising
Drug Abuse
Elections, politics
Energy Conservation
Fund Raising
Gardening
Health care
Health foods
Inflation
Interest rates
Jeans
Jogging
Plants
Private labeling
Science Fiction
TV Games
Video recorders

9. Location

It is vital to know where you want the promotional product to be used to give you the most exposure. It must be seen and be seen often to be most effective.

In the office
● On the wall; on the desk
At home
● In the kitchen; by the phone
On person
In vehicle

10. Distribution

Now you will want to decide how you are going to get your promotion and the items you are going to use for that promotion into the hands of your target audience. Check those methods that best apply to your own situation:

Handed directly to customer as business gifts, by salesperson
Handed to visitors at trade shows
Mailed or shipped to customer as business gift
Given to salespeople by sales manager as motivator or incentive
Handed directly to customer as reward for trying new product
Presented to visitors by receptionist or "official greeter"
Mailed out upon request of customer
Handed or mailed to satisfied customer who refers someone who purchases your product or service
Mailed to credit card holders
Given as "dealer incentive" to retailers on condition that specified purchase of one or more products is made
Given free with purchase at time

of purchase, as:

● In-pack (product enclosed in product package)
● On-pack (attached to exterior of product package or riding with it in special sleeve, carton or film wrap)
Packed as part of point-of-purchase display, sent to dealers
Mailed with self-liquidator-consumer item offered for proof of purchase and cash amount to cover cost of merchandise plus handling and postage.

11. Packaging

You may want to vary the packaging. For instance, you might offer a promotional item as is or gift packaged, depending on your target group meeting certain qualifications. Or, consider attaching your items to other things like letters, flyers, brochures, etc.

Bulk
Tagged
Individually wrapped
Gift Wrapped
Special packaging for mailing

12. Results

What results are you looking for this promotion to accomplish? And once your promotion has been completed,

Were objectives met?
Was the target group covered?
Was the theme carried out?
Was the message understood?
Were favorable comments received?
What would you do differently next time?

13. Specialty Advertising Counselor

As your specialty advertising counselor, I can be a tremendous source of ideas for you... show you how to target in on the most important points in your plans... assist you in choosing the products that best match your ideas, enabling you to reach the goals that you've set. And I am always available for no-obligation counseling — just a phone call away. Now, let's start that new promotion.

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