

Annual Marketing Planning Checklist

- 1. Gather All Advertising, Marketing and Visibility Materials**
Get it all in one place, all in the same room, all on the same table. It's really eye opening to see it all laid out in front of you. Include any new additions to your marketing/advertising this year as well as older materials that are still in use: copies of ads and campaigns, newsletters, sales materials, brochures, signs, promotions and printed screens from your website. Also include written materials: bios, history, service lists and press releases.
- 2. Sort & Organize**
Put everything in the proper stack and then group similar items. You can use folders, binders, or just piles. Also, this is the perfect time to separate out all of the "ideas" that were never put into use from the items that were actually implemented. Put those aside.
- 3. Start Writing It Down**
Just take inventory. If you have just a few initiatives, put them all on one list. If you have lots of moving parts, you can group items by campaign (1/2 off sale) or by type (all direct mail). Give each effort a short title, a date and only if necessary, an explanation.
- 4. Look for Measurements!**
You may have come across these numbers already, but if you didn't... go looking for them. Are there any numbers or response rates that will help you measure the success or failure of each specific effort? Print out detailed reports if possible and include them in the proper stack. Then add the numbers to your inventory sheet.
- 5. Gather Financials**
Gather all of the financial information to go along with each advertising/marketing activity. Ideally, run a full expense report as well as detailed sales reports. Again, include as much detail in the reporting as possible and add the numbers to the inventory sheet.
- 6. Estimate the Time Investment**
Take a moment to consider the time that went in to each of these activities. Try to separate emotions from numbers. Something that is fun may seem to take less time. Something that is challenging or even unpleasant may seem to take longer. Just try to get honest numbers added to the inventory sheet.
- 7. Rate/Grade Each Activity**
Now look through the list and give each item a score. Use letter grades or a 1-5 scale. Just give each item a simple score based on the overall success of the activity.
- 8. Identify Strengths & Weaknesses**
Include the entire management team so that everyone is on the same page moving forward. Decide which activities will be repeated and which won't. Look at individual efforts, but also review the overall messaging and imagery. Is your identity consistent through all of your materials? If not, that may need as much attention as the individual activities moving forward.
- 9. Plan Ahead & Write It Down**
Now that it's all out in front of you, prioritize, set budgets and goals for responses, designate who is responsible for each task. Put the entire plan on paper and make sure everyone has a copy.
- 10. Schedule Regular Meetings for the New Year**
Set monthly meetings. Have everyone add these dates to their calendar right now. Also, schedule an annual planning retreat at the end of the year.



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