



**YOUR  
PROMO  
PLANNER**



USE THIS **STEP-BY-STEP GUIDE** TO:

Build a great business plan

Launch a successful, affordable  
promotional program

*COMPLIMENTS OF*

# PLAN AND BUDGET

## EVENT DESCRIPTION

---

---

---

---

- Business-to-business     Business-to-consumer     Internal

**Budget:** \_\_\_\_\_

**Schedule:**

Date of event/program launch: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Order date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

In-hands date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## OBJECTIVES

What are you trying to achieve?

Employees	Customers	Awareness
<input type="checkbox"/> Motivate	<input type="checkbox"/> Thank you	<input type="checkbox"/> New product launch
<input type="checkbox"/> Improve morale/ performance	<input type="checkbox"/> Build loyalty	<input type="checkbox"/> Rename/reposition
<input type="checkbox"/> Performance rewards	<input type="checkbox"/> Encourage use/trial	<input type="checkbox"/> Promote
<input type="checkbox"/> Recognition	<input type="checkbox"/> Gift with purchase	<input type="checkbox"/> Cross/upsell
<input type="checkbox"/> Other _____		

## AUDIENCE

Who is your primary audience?

Present customers     Prospective customers     Employees     Students

Former customers     Top customers \_\_\_\_\_%

Job function or title \_\_\_\_\_

Other \_\_\_\_\_

# PLAN AND BUDGET

## AUDIENCE DEMOGRAPHICS

- Age range \_\_\_\_\_
- Men     Women
- Other: \_\_\_\_\_

## MESSAGE

**What major point do you want to communicate?**

---

---

---

**If you could sum up your message in one sentence, what would you say?**

---

---

---

## THEME

Does your promotion fit any theme? For ideas, check the list of 2020 events on the last page of this guide.

**What is the theme of your promotion?**

---

---

---

**What tone would you like to project?**

- Exciting                       Informative
- Urgent                          Authoritative
- Factual                         Competitive
- Educational                  Aggressive

# PLAN AND BUDGET

## MEDIUM

### What is the best way to reach your audience?

- |   |  |
|---|--|
| <input type="checkbox"/> Direct mail          | <input type="checkbox"/> Internet advertising  |
| <input type="checkbox"/> Hand-deliver         | <input type="checkbox"/> Networking            |
| <input type="checkbox"/> Phone                | <input type="checkbox"/> Ceremonies            |
| <input type="checkbox"/> Email                | <input type="checkbox"/> Trade shows           |
| <input type="checkbox"/> Fax                  | <input type="checkbox"/> Broadcast advertising |
| <input type="checkbox"/> Face-to-face meeting | <input type="checkbox"/> Gift with purchase    |
| <input type="checkbox"/> Fundraiser/event     | <input type="checkbox"/> Bundled with product  |

### How will the fulfillment be handled?

- Hand-delivered by assigned staff members
  - In-house mailroom
  - Outsourced fulfillment house
- 
- 
- 

### Are there any other sales collateral or marketing campaigns that this product must work with?

- Cover letter
  - Your catalog/brochure/flyer
  - Another promotional product
- 
- 
- 

### What type of packaging do you want to use?

- |   |   |
|---|---|
| <input type="checkbox"/> None                 | <input type="checkbox"/> Gift packaging |
| <input type="checkbox"/> Individually wrapped | <input type="checkbox"/> Custom         |
| <input type="checkbox"/> Other                | <input type="checkbox"/> Envelope       |
- 
- 
-

# PLAN AND BUDGET

## DEADLINE

Date and plan for educating your teams (marketing, sales, etc.):

Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**When and where must the message get to the audience for maximum effect?**

- Trade show date      \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Special event date    \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Holiday date            \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Specific date            \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Product intro date    \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Other date                \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## MEASURE SUCCESS

**How will you track the success of your program?**

---

---

---

---

## FINAL NOTES

Follow up by \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Additional notes:

---

---

---

---

# YEARLONG BUDGET WORKSHEET AND PLANS AT A GLANCE

	4 <sup>th</sup> Quarter	3 <sup>rd</sup> Quarter	2 <sup>nd</sup> Quarter	1 <sup>st</sup> Quarter				
Date								
Events								
Purpose								
Item/No. of Items								
Unit Cost								
Misc. Fee								
Total Cost								

(No. of Items x Unit Cost) + Misc. Fees = **Total Cost**

**Tip:** Remember to discuss setup charges, postage costs, packaging requirements and other line items with your distributor.

# 2020 CALENDAR OF EVENTS

## January 2020

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

National Mentoring Month

## February 2020

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Black History Month

## March 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Women's History Month

## April 2020

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Autism Awareness Month

## May 2020

S	M	T	W	T	F	S
						1 2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Mental Health Awareness Month

## June 2020

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

National Safety Month

## July 2020

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

National Ice Cream Month

## August 2020

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

National Wellness Month

## September 2020

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

National Literacy Month

## October 2020

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Breast Cancer Awareness Month

## November 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Diabetes Awareness Month

## December 2020

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Safe Toys & Gifts Month

### January 2020

- 1 New Year's Day
- 20 Martin Luther King Jr. Day
- 25 Lunar New Year

### February 2020

- 2 Groundhog Day
- 14 Valentine's Day
- 17 Presidents' Day

### March 2020

- 17 St. Patrick's Day

### April 2020

- 15 Tax Day
- 22 Earth Day
- 22 Administrative Professionals Day

### May 2020

- 5 Cinco de Mayo
- 16 Armed Forces Day
- 25 Memorial Day

### June 2020

- 14 Flag Day

### July 2020

- 1 Canada Day
- 4 Independence Day
- 14 Bastille Day
- 26 Parents' Day

### August 2020

- 19 National Aviation Day

### September 2020

- 7 Labor Day
- 11 Patriot Day

### October 2020

- 4 Start of Fire Prevention Week
- 5 Child Health Day
- 12 Columbus Day
- 16 Boss's Day
- 17 Sweetest Day
- 24 United Nations Day

### November 2020

- 11 Veterans Day
- 26 Thanksgiving
- 27 Black Friday
- 30 Cyber Monday

### December 2020

- 21 Shortest day of the year
- 10 First day of Hanukkah
- 25 Christmas Day
- 26 First day of Kwanzaa