

Digital planning guide

Strategy Formulation and Digital Planning Guide

How to Use This Template

This digital planning guide will help establish a strategy and plan for developing supporting specified Program goals and objectives. It is designed as an integral part of the overall planning process involving multiple roles and organizations.

This document will assist in formulating components in a clear, easy-to-follow process. The information compiled in this Guide can be utilized in the actual implementation of digital projects and as part of creative briefs and internal communication documents.

Digital planning guide description

1. Campaign Mission and Objectives

Marketing Programs address the objectives of Firm Marketing Goals as defined by the Partners, Marketing Directors, and Subject Matter Experts. Individual Campaigns would take shape as Acquisition, Retention, Cross-Sell/Up-sell, Reactivation and Referral initiatives.

2. Campaign Description

A Campaign is a group of marketing activities that supports Program objectives. Marketing Project Managers develop the implementation strategies to address individual goals and objectives of the specified campaign.

3. Campaign Instances

A Campaign Instance is an individual tactic/activity consisting of a specific segment and tactics creative, message and offer.

4. Approval

The Marketing Project Manager reviews the Campaign Planning Guide with key Stakeholders who provide approval.

Campaign Plan Version:

	Date:
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Prepared by:

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Project manager:

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Project team:

Name	Role	Name	Role

Digital Project Mission and Objectives

Complete the table below to provide the context and high-level goals for the project and project Instances.

Program Type:	<input type="checkbox"/> Acquisition <input type="checkbox"/> Retention <input type="checkbox"/> Up Sell/Cross-Sell <input type="checkbox"/> Reactivation <input type="checkbox"/> Referral
Campaign Name:	
Target Responses Description:	
# Projected Target Responses:	

Project description

Project Name: <Insert Here>

The questions below can assist in further developing the details for the marketing opportunity identified in the Brainstorming session.

- What impact will this Campaign have on the prospects/client's experience with CCB?
- What compelling reason /offer will stimulate response? What incentive opportunities, if any, should be considered to boost response?
- What primary (i.e., event invitation) and secondary (i.e., thought leadership or follow-up) messages will be used to influence the prospect/client's current attitude or behavior?
- What is the expected change in prospects/client attitude or behavior?
- When will our prospects/clients be most receptive to this offer?
- Who (internally and externally to CCB) may be impacted by the execution of this Campaign?
- What are the critical success factors of the Campaign?
- What marketplace intelligence can CCB gain from launching this Campaign?

Project status and logistics

Refer to the Campaign/Campaign Project Plan for:

- Campaign Schedule/Timeline
- Issues Log/Action Items

Media channel

☐ Email ☐ Direct Mail ☐ Event ☐ Web ☐ Other:

Check all that apply

Target prospects/segments

Describe each client/prospect to be targeted in this project (a more defined sub-set of the Leads described at the Project Level). Define the characteristics and estimate the number of leads for each Segment. If there is more than one target segment, define this information for each.

Lead Segment Characteristics	
Sub-segment Characteristics	1
	2
	3
Estimated Number of Targets	

Market considerations

Review market information, competitive information and company information and identify any considerations that may impact the Project response rate and conversion.

Considerations	Impact

Forecast costs/Level of effort (hours)

Identify additional costs associated with the successful execution of this Campaign.

Budget Item	Cost in \$'s	Est. Internal hours
Design	\$	
Copywriting	\$	
Mailing (Postage, Mailing House, Email)	\$	
Printing	\$	
Data Entry	\$	
Web Site Development	\$	
Event	\$	
Other*	\$	
Total Projected Expense:	\$	
Total Projected Budget	\$	
Total Projected Difference	\$	

Forecasted results

Utilize available business intelligence including behavior, historical data, life cycle stage data, and client needs to estimate potential responses to the project.

Estimated:

# of Responses	
# of Opportunities	
Revenue	
Projected ROMI	

Campaign Instance Level Details

Campaign Instances

Use the table below to describe the all of the Campaign Instances and their descriptions that apply to this Campaign.

Instances	Description
<Campaign Instance 1>	
<Campaign Instance 2>	
<Campaign Instance 3>	

Test Objectives

Testing is an important component of any Campaign. A Campaign can be comprised of one or many associated Campaign Instances. Campaign Instances can be designed to test one or more components against others. Define the test objective and each different case scenario.

Test Matrix (if Testing)

Construct the Campaign Instance Test Matrix below by identifying the possible elements of the Campaign Instances which will be tested.

<Campaign Instance 1> List breif description here		
	Test A <insert Description>	Test B <insert Description>
Variable 1		
Unique Code		

<Campaign Instance 2> List breif description here		
	Test A <insert Description>	Test B <insert Description>
Variable 1		
Unique Code		

<Campaign Instance 3> List brief description here		
	Test A <insert Description>	Test B <insert Description>
Variable 1		
Unique Code		

Response/Fulfillment Management Details

Elaborate on the process and vendors required to manage client responses to the Campaign Instances above.

Channel:	Process	Point-of-Contact
Email		
Web		
Call		
Other:		

Describe the process and communication that will be used to follow-up with late or non-responders.

	Timing of Follow-up	Message/Communication	Medium
Late-Responders			
Non-Responders	Future Phase		

Wrap up – closing the loop

Specify Campaign Instance actual response rates so that the project team can make informed strategic decisions prior to full implementation of the Campaign and to future initiatives.

Campaign Instance 1:

Metric	Actuals
Number of Responses:	
Number of Completed Appts:	
Number of Qualified Leads:	
ROMI:	

Conduct Project Review (Process Review- If needed)

Approval:

Project Manager

Date

Assistant Managing Editor, Online

Date

Director, Digital Strategy

Date