

Goals [1]

What is the problem you are trying to solve? (1 sentence)

Primary SMART GOAL

Secondary SMART GOAL (optional)

Big Picture Objective (Personally)

Big Picture Objective (Business)

About Your Business [2]

What do you do?

How do you do it differently than your competitors?

Why do you do it this way?

Why is that important to you?

If your brand was a person, what words would you use to describe them?

Which of these best accurately describes your sales process?

Who are your main competitors?

What are the top 5 questions you receive from your clients?

Focus Areas of Campaign [3]

Is there a key message or focus to this campaign? (Optional)

Which products/services would you like to focus on?

Which products/services should be excluded?

Geographies for Campaigns

Geographies for Ads

Geographies to Exclude [4]

What is your existing marketing mix?

A-Clients [5]

Group					Group Name 5
B2B or B2C?					
Catalyst/Buying Situation					
Beliefs/Attitudes					
Hobbies/Interests					
Purchase Frequency					
Geography					
Income					
Age					
Gender					
Marital Status					
Children					
Education Completed					

Preferred Device (nice to know if available)				
How do you want them to reach out to you?				
Want-to-know moments				
What kinds of questions are people asking that would lead them to you? (Think researching a solution to a problem they are experiencing)				
Want-to-go moments				
(near me, directions to, looking for physical products to see i.e. showroom)				
Want-to-do moments				
(how to, tutorials, DIY) [6]				
Want-to-buy moments				
(searching brands, price, reviews, specific product SKUs etc.)				

B2B Only [7]

Roles i.e. Roles we want to get in front of in the organization				
Organizations i.e. types of companies that they want to get in front of				
Websites i.e. Websites for these companies				
Company Size				
Company Industry				
Company Business Type				
Years in Business				

Business Chassis

Increase Percentage		Increase	
Leads		Leads	0.00
Conversion rate		Conversion rate	0.00%
Number of customers	\$0	Number of customers	0.00
Frequency of purchase/year		Frequency of purchase/year	0.00
Avg Sale		Avg Sale	\$0.00
Revenue	\$0.00	Revenue	\$0.00
Margin [8]		Margin	0.00%
Gross Profit	\$0.00	Gross Profit	\$0.00
Lifetime of Customer in Years		Lifetime of Customer	0.00
Lifetime Value in Revenue		Lifetime Value	\$0.00

**Key Messages
(To Be Completed By Ops Team) [9]**

Key Messages (What theme runs throughout the moments?)				
Recommended Channels				

Sample CTAs

Other Notes

[1] The goals section helps frame the overarching strategy of the marketing campaign. Try to be as specific as possible.

[2] The "About Your Business" section provides helpful information so that our team understands how your business is differentiated from competitors. It helps our team understand why you do what you do (your motivations).

[3] This is your opportunity to tell us which area of your business you would like to focus this marketing campaign on. Please be as specific as possible.

[4] The "Buyer Personas" section is used to help our team understand your target audience groups, including their buying situations, purchase journey and common characteristics. For example, if you ran a Staples Store, a Buyer Persona group could be teachers who are looking to purchase supplies for their classroom. This group of people share a common buyer journey and common characteristics.

The better we know your target audience groups, the better we can actively target them to help achieve your campaign goals.

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[6] Please add in the required fields only if you are targeting Business-2-Business customers.

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[8] *Only to be completed by the operations team

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