



Annual Planning Guide

Contact Us

t- 210/476-8801

f- 210/476-8668

1114 S Saint Mary's, Suite #200
San Antonio, TX 78210

How to use this guide

1) Annual Planning Checklist

We have created a really simple checklist to help you prepare for 2020.

This preparation can take between an hour and a few days, depending on the number of marketing activities you undertake and the amount of data you have to gather, but nothing can affect your 2020 outcomes more than solid analysis and planning.

2) Activity Report

This template gives you an easy way to evaluate all the marketing activities from this past year. Why look back? Few people have the experience to build a marketing program from the ground up, determining audience size, outreach methods, budgets and anticipated results. Most small businesses are operating on a budget that is largely based on the prior year. So, looking at the last year closely, you can make sure that your budget is being allocated appropriately in 2020.

Don't be surprised if not all of the information is easy to gather, for example: It might be a pain to track down the expenses through your accounting team. It can be hard to quantify the time that was spent on projects if you don't track time. You may not have a clear report to run for results on certain types of projects. Don't let information gathering scare you off. Fill it in as best you can, delegate whatever you can, and don't sweat the information that is missing. Just going through this process will help you understand how quantifiable (or not quantifiable) your activities are.

After you have done your best, take a step back. It's so important that you look at all of your past activities together in one place. Look at them objectively, separating your feelings that may have swayed you from the cold hard facts about their effectiveness, time spent and cost.

3) Activity Planning and Schedule

In this template, write down everything you plan to do in 2020. Use last year's activities as a starting point. Eliminate those activities that didn't work and add new ones that you want to try. These are goals. You may not get to them all, but it's a good start to have them all written down. From there you can start planning how you want to get them accomplished.

We have used this method in workshops for more than 20 years and people regularly have an "AH-HA" moment when they look at their activities in this way. Being in business for 22+ years, we have helped hundreds of businesses with their marketing, branding and websites, and we have written more than 75 strategic plans (since we started counting). We can help ensure that your activities and budgets are aligned with company goals, and that tracking is set up to measure results against those goals.

We would love to help you start 2020 with a solid plan. Join us for a facilitated workshop to get your planning kicked off or have us develop your strategic marketing plan for you. Give us a call today to schedule a meeting.



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Annual Marketing Planning Checklist

- 1. Gather All Advertising, Marketing & 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. **(Use page 4 to do this)**
- 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. **(Use page 5 to do this)**
- 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.

