

Communications Planning and Budget Checklist

With 2012 fast approaching, *now* would be a good time to start planning your marketing and communication goals for next year. Use these five easy steps to complete your planning worksheet. The worksheet will show you ways you can effectively market your organization and communicate with your customers and prospects. By first evaluating your current marketing activities (what works and what doesn't), you will be able to identify gaps and begin the planning and budgeting process to achieve your marketing and communications goals.

Step 1. Set your budget.

It varies by company and industry, but a common marketing budget is 3-5% of total sales.

Step 2. Determine your marketing goals and objectives.

Your objectives might be to increase sales, or gain new clients, for example.

Step 3. Identify the strategies and tactics that support your goals.

If your goal or objective is to gain new clients, one strategy might include; devising new reasons for potential clients to engage your services or buy your products, using a combination of updated new business/lead generation vehicles supported by updated sales support materials. Incorporating a tactic of a new direct mail campaign with updated brochures will help increase sales.

Step 4. Create a timetable.

Use your annual plan to schedule your marketing activities throughout the year. Some initiatives will be conducted multiple times during the year.

Step 5. Estimate your costs.

Earmark dollars for your key initiatives, budgeting for them on a monthly basis. Then, track your actual expenses against your budget.

WISSH Graphics can help.

WISSH Graphics can be your source for strategic marketing solutions and advice, as well as the resources to execute your marketing programs in a timely and cost-effective way. *Contact us and we can help you get started today.*

GRAPHIC DESIGN • WEBSITE DESIGN • PRODUCT ILLUSTRATION

Marketing Communications Goal: _____

Marketing Budget: _____

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
IDENTITY MATERIALS													
Logo Design													
Business Cards													
Business Stationery													
Others: _____													
CUSTOMER COMMUNICATIONS													
Direct Mail													
Customized PURLS													
Newsletters													
E-Marketing													
Social Media Marketing													
Customer Appreciation													
Satisfaction Surveys													
Others: _____													
NEW BUSINESS / LEAD GENERATION													
List Creation / Purchase													
Direct Mail													
Customized PURLS													
Tele-Prospecting													
Trade Shows													
Website													
SEO, Local Search													
E-Marketing													
Yellow Pages (print & online)													
Magazine Ads													
Networking Memberships													
Other: _____													
SALES SUPPORT MATERIALS													
Presentation Folders													
Brochures													
Promotional Products													
Sell Sheets/Flyers													
Thank You Notes													
Case Study Reports													
Powerpoint Presentations													
Other: _____													
EVENT PLANNING													
Trade Shows													
Powerpoint Presentations													
Direct Mail													
Customized PURLS													
Signs, Posters, Banners													
Invitations													
Brochures													
Promotional Products													
Follow-up Materials													
Other: _____													
EMPLOYEE RELATIONS													
Employee Manuals													
Newsletters													
Awards & Recognitions													
Apparel													
Other: _____													
Monthly Cash Budget													