**Campaign**

**Planning Workbook**

**CAMPAIGN PLANNING WORKBOOK**

One important lesson we learned is that marketing campaigns that produce significant results are complex to plan, execute and optimize. Today, companies have the resources to run their own campaigns, but planning those campaigns, selecting the right tactics, setting expectations and optimizing the performance remains challenging for a lot of people.

In the Campaign Planning Workbook, we outline the frameworks we use to plan client campaigns. You can use these same frameworks to plan your campaigns, select the correct tactics, optimize the campaign performance and improve your results.

**CAMPAIGN OVERVIEW.**

*Italics represent examples of actual campaign planning workbooks.*

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| --- | --- |
| Campaign Name: | *Sales Opportunity 60* |
| Buyer Journey Stages: | *Target prospects in the Consideration and Evaluation stages* |
| Targeted Personas: | *Facility managers or general managers actively planning to renovate and redesign a common space over 20,000 square feet* |
| Campaign Timing: | *90 days (August through October)* |
| Campaign Goals: | *Over campaign duration:*   * *60 sales-qualified leads (SQLs) per month* * *10 sales opportunities per month* * *180 SQLs* * *30 sales opportunities* |
| Campaign Messaging: | *Create a disruptive, emotional and compelling story. Make sure it fits in with the overall company story and messaging. Campaign messaging should be a piece of the bigger story.* |
| Campaign Offer: | *You’ll need an early buyer stage offer, like a piece of new educational content. You’ll need a middle buyer stage offer, like a webinar. Finally, you’ll need a late stage buyer offer, like a complimentary review, assessment or analysis – something your prospects value that sales can deliver during their initial qualification call.* |
| Campaign Tactics: | 1. *Content creation 1X/month* 2. *Email marketing 2X/month* 3. *Social media posting on Facebook, LinkedIn and Twitter 5X/week* 4. *Paid social advertising on Facebook and LinkedIn* 5. *Paid Google Ads* 6. *Late-stage buyer journey offers 1X/month* |
| Campaign Optimization Efforts:  *(These are designed to increase program performance to either hit goals or exceed goals. Having these preplanned helps you quickly apply them if and when needed.)* | 1. *CTA button title adjustments* 2. *Email subject line A/B testing* 3. *Landing page optimization – headline, subhead, form, page copy, images, page design, heat-mapping data* 4. *Paid social – ad design, ad copy* 5. *Paid Google Ads – ad design, ad copy* 6. *Late-stage buyer journey – offer copy, landing page design (see above)* |

**CAMPAIGN METRICS.**

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| --- | --- |
| Available Audience | |
| Total available people who fit the personas: | *Estimated at 10,000 nationally* |
| Audience Google Search: | *Estimated at 5,500 searches monthly* |
| Audience social: | *Estimated at 4,000 people* |

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| --- | --- | --- | --- | --- |
| **Email** | |  | **Social** | |
| Email marketing database: | *2,555* | Paid Google Ads impressions: | *1,000/month* |
| Email sends: | *5,000/month* | Paid Google Ads conversion rate: | *2.5%* |
| Open rate: | *20%* | Visitors to landing page: | *25* |
| Click rate: | *5%* | Paid social impressions: | *500/month* |
| Visitors to landing page: | *50* | Paid social conversion rate: | *8%* |
| Visitors to landing page: | *40* |

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| --- | --- |
| Landing Page Performance | |
| Total visitors to landing page: | *115/month* |
| Split on visitor offer display (early stage vs. late stage): | *50%/50%* |
| Landing page 1 (early stage)  Email, search and social landing page conversion rate: | *30%* |
| Leads generated from landing page 1: | ***17*** |
| Landing page 2 (late stage)  Late-stage buyer journey landing page conversion rate: | *40%* |
| Leads generated from landing page 2: | ***23*** |
| Total leads generated per month: | *40/month* |
| Total leads generated over campaign:  *(3 months)* | ***120 Total Leads*** |

**CAMPAIGN BUDGET.**

|  |  |
| --- | --- |
| Content creation: | *$5,000 per month* |
| Email marketing: | *$0* |
| Social media postings: | *$0* |
| Paid social media ads: | *$2,000 per month* |
| Paid Google Ads: | *$1,000 per month* |
| Late-stage buyer journey offer development: | *$1,000 per month* |
| Total monthly budget: | *$9,000 per month* |
| Campaign Total: | *$27,000 over campaign duration* |

**ROI CALCULATOR.**

|  |  |
| --- | --- |
| Total leads/SQLs/sales opportunities: | *120* |
| Conversion rate into proposals: | *10%* |
| Proposals: | *12* |
| Close rate: | *30%* |
| Projected new clients: | *4* |
| Average revenue from new clients: | *Initial projects $50,000;  ongoing lifetime value $90,000* |
| Revenue from new clients: | *$200,000* |
| Investment: | *$27,000* |
| ROI: | ***87%*** |

**About This Workbook**

Very few companies and campaign efforts are created equally. This workbook represents just a sample campaign. Campaign performance, campaign budgets, campaign expectations and campaign tactics will vary. Use this workbook as a framework to plan, execute and optimize your own campaigns.

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| Square 2 is a full-service revenue growth agency designed to produce results for clients. We help you understand the changing buyer journey and how revenue is directly related to marketing, sales and customer service execution.  We help you with strategy, tactics, analytics, and technology to build revenue generation machines that produce month-over-month revenue growth.  We use our Cyclonic Buyer Journey™ model to help you map your prospects’ buyer journeys to the right sales, marketing, and customer service tactics.  We use our Revenue Generation System (RGS) to help you install a repeatable, scalable, and predictable process to generate more leads, more sales opportunities and more new customer revenue.  Also, we are the ONLY agency to provide you with a dedicated team where one client team works on only one client at any time. This allows us to deliver six months of work in just 30 days and accelerate results for you from months to weeks or even days.  Square 2 provides you with a senior team with an average experience of over 10 years, and we choose (yes, choose) to only work with a handful of clients at a time. This enables us to dig in and provide you with a more intimate and efficient experience with our team.  Our mantra – we want you to #LOVEYOURAGENCY. To learn more, visit www.square2marketing.com. |