

MARKETING INITIATIVE WORKSHEET

Initiative:

Date:

Goal(s):



WHAT IS THE AUDIENCE FOR THIS MARKETING INITIATIVE?

Research Resources / Who is the target? / What are their personas?



WHERE IS THE AUDIENCE FOR THIS MARKETING INITIATIVE?

Which strategies, mediums, and channels are the best way of reaching this audience? How is our competition reaching them?



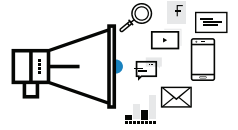
WHAT RESOURCES NEED ALLOCATED TO THIS MARKETING INITIATIVE?

Platforms / People / Budget / Time / Authorization for additional tools or external resources?



ARE THERE OTHER EFFORTS THAT WE CAN COORDINATE WITH TO MAXIMIZE THIS INITIATIVE'S RESULTS?

Omnichannel / Can we coordinate with other marketing initiatives to promote this one?



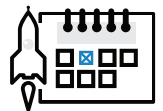
HOW WILL WE MEASURE WHETHER THIS INITIATIVE IS SUCCESSFUL?

Do we have pixels, analytics, and tags properly installed with event, campaign, and conversion tracking?



WHEN CAN WE TEST AND VALIDATE OUR HYPOTHESIS?

At what point should we decide to change or end the effort? / How can we test different iterations?



WHAT DID WE LEARN FROM THIS MARKETING INITIATIVE THAT CAN BE APPLIED TO THE NEXT?

What do we need to remember next time we try this? / What lessons can be applied to other efforts?

