
MARKETING CAMPAIGN STRATEGY - CHECKLIST

A campaign strategy is a document that outlines the point of the campaign, sets boundaries, limitations and risks, and planned delivery.

All stakeholders should have access to read a copy and be able understand the core details of the campaign from initial read. It needs to be clear and concise, not be so long otherwise the results will reflect this. This saves time in communication and smoother integration with other mediums.

CHECKLIST **Does your strategy campaign include the following?*

- 1. STRATEGIC OVERVIEW:** *This is a paragraph summary of the foundations of a campaign.*
 - Rationale: *Explain the reasoning for the need for the campaign*
 - Objectives: *What is the overarching SMART objective.*
 - Timing: *When does the campaign start, and when will it finish.*
 - Resources: *Briefly list equipment, locations, etc. that you have.*
- 2. STAKEHOLDERS:** List all people who will be involved in the campaign. Departments, freelancers, agencies, etc. You could include this above in the summary if the campaign is predominantly in-house.
- 3. RESOURCES:** List any equipment you have or whether you will need to source in. Or if minimal include as above.
- 4. TARGET MARKETS and AUDIENCE:** Clarify the target market, industry and audience segmentation.
- 5. SWOT & PESTEL:** Go through each point for SWOT and PEST around your business, product and/or Industry.
- 6. COMPETITOR ANALYSIS:** Do a SWOT for min 3 primary competitors. This will highlight gaps and opportunities in the market.
- 7. BUDGET:** State the complete budget available, or preliminary budget and whether you will need to hire/outsourcing or rent equipment.
- 8. KEY DATES:** List any key dates that could affect the campaign. Such as Christmas, Bank Holidays, partner campaigns, etc.

9. MARKETING CHANNELS

For each marketing activity, make sure you cover each point in brief, below.

- **OBJECTIVE:** What you want to achieve by using this channel.
- **RATIONALE:** Reason to use this channel, e.g. it's where one of your target segmentations are. (This supports/reinforces internal buy-in).
- The specific **TARGET AUDIENCE** for this channel
- **ACTION:** What will be implemented, how, and when.
- **BUDGET:** Percentage of the budget and cost of any purchase using this channel. If you can't be specific with budget you can specific percentage of your time compared with other channels. This helps to define ROI once you have received results
- **METRIC:** What are you KPIs (what will you measure?) of this channel and what will it tell you?
- **TIMING:** What will happen at each stage and when will it happen (this is often monthly if you don't have exact dates).
 - **Planning & Research stage**
 - **Creation stage** (always takes longer than people expect, especially with many stakeholders involved.)
 - **Delivery stage:** Implementation
 - **Metrics stage:** When it starts and how regularly.

ACCOMPANYING DOCUMENTATION

Once a marketing strategy has been researched, agreed and signed-off, it should also be accompanied with:

- A concise Calendar Time Plan showing timed actions and stakeholder responsibilities, for each activity. Use my Marketing Strategy and Time Plan template for this.
- Static Details document that holds important information that is unlikely to change, such as core campaign title, campaign hashtags, websites, online profiles, dates, email address. This could be done for each marketing medium, if needed. It let's all stakeholders have access to read but not amend, keeping everyone on target.
- Keep in-depth strategies, such as Content Marketing, PPC and Social Media strategies, external to the Campaign strategy. There is too much data to include and it will dilute the important integrated details of the campaign. Refer to these strategies and have them as additional documents.

Need help developing your own marketing strategy? Ask Kathryn how she can help you develop your own. hello@kathrynmcmann.com www.KathrynMcMann.com

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