



2020 Vision: Campaign Planning Templates



Template directory

Inside, you'll find these templates:

- Campaign vitals—campaign planning (high-level)
- Campaign content—content planning
- Content assessment—content planning (ensuring balanced mix)
- Campaign strategy—campaign planning (actionable)
- Campaign performance measurement—campaign KPIs
- Product launch at-a-glance—campaign planning



How to use these templates

Turn your great ideas into an actionable plan.

These templates can help you put some structure around your ideas. Use them to:

- Communicate your plans to senior management and sales teams
- Understand your marketing workload for the coming quarters
- Ensure you have enough content to support your campaigns
- Help track your results



Campaign vitals

Use this template to define campaigns for a product or service.

Campaign Title	Enter Title Here	Market Better in 2020	Title #3
High-Level Messaging	Describe the messages you want this campaign to communicate.	Adopting best marketing practices and new technologies in 2020 will help businesses grow and win.	
Topics (maps to content planning worksheet, see slide #5)	Which topics will this campaign cover?	Plan for Success, Replace Spreadsheets with Marketing Automation, Do More with Your Marketing Automation Platform	
Products / Solutions / Offers	Which products, solutions, and offers will this campaign promote?	Marketo Engage	
Buyer Need / Pain-Point	Which buyer pain points will this campaign address?	Improve marketing performance, run more campaigns without adding headcount,	
Target Personas	Which personas will this campaign target?	Marketing Managers at B2B Enterprises ("Sue" and "Dave")	
Target Industries	Which industries will this campaign target?	Finance, Manufacturing, Technology	
Goals and KPIs (e.g., expected # of leads, etc.)	How many leads will this campaign generate? What other benchmarks will it meet?	150 new names at target accounts	



Campaign content

Use this template to flesh out topics and content modules for each campaign.

The are stages in the customer journey. Adjust as needed.

Campaign title: Campaign #1

Topics		Suggested Content		
		STAGE 1 (DISCOVER)	STAGE 2 (EXPLORE)	STAGE 3 (EVALUATE)
Topic title	1-2 sentence description of the story your content will tell.	<ul style="list-style-type: none">List the content you will create for the first step in the customer journey	<ul style="list-style-type: none">List the content you will create for the second step in the customer journey	List the content you will create for the third step in the customer journey
Replace Spreadsheets with Marketing Automation	Tracking campaigns with spreadsheets is time-consuming, costly, and error-prone. Switching to marketing automation can save time and money while improving results.	<ul style="list-style-type: none">5 Ways Spreadsheets Are Bad for Your Marketing Program, blog post (1,000 words)How Tracking Campaigns with Spreadsheets Is Costing You Money, eBook (4 pages)	<ul style="list-style-type: none">How to Choose a Marketing Automation Platform, eBook (8 pages)Are You Ready for Marketing Automation? Quiz (5 questions)	Spreadsheets vs. Marketing Engage: A Point by Point Comparison, checklist (2 pages) What Happened When Acme Switched to Marketo Engage, case study (4 pages)



Content assessment

Use this template to ensure you're planning a "balanced diet" of content to address the full spectrum of prospects' needs.

Legend:

Green = Campaign #1

Blue = Campaign #2

Red = Campaign #3

//* = Refresh of existing content

Quarter	Messaging Arc	Product Launches	Trend Related	Partner/ Thought Leader	Educational
Quarter1	<ul style="list-style-type: none">• Why Marketing Needs AI, video• Are You Ready for AI? Quiz• 5 Ways Revenue Attribution Can Improve Results, blog post (800 words)• 5 Ways Spreadsheets Are Bad for Your Marketing Program, blog post (1,000 words)	•			
Quarter2					
Quarter3					

REMINDER! Refreshing existing assets is a quick and cost-effective way to populate your content calendar.



Campaign strategy

Use this template to map out your campaign strategies for the next quarter.

Legend:
Green = Campaign #1
Blue = Campaign #2
Red = Campaign #3

Activities	MONTH #1	MONTH #2	MONTH #3
Events	AI in Marketing Summit CFO Conference	MarCom Stars Conference	MarTech Alliance Conference
Email	AI nurture sequence 0% financing offer sequence	AI nurture sequence (continued) Marketing attribution ROI sequence 0% financing offer sequence (continued)	Marketing attribution ROI sequence (continued)
Direct mail			
Social media			
SEO			
Pay-per-click			
Content syndication			
Webinars			



Campaign performance

Use this template to summarize your campaign's performance.

Adjust according to your customer lifecycle

Activity	Cost	Leads	MQLs	SQLs	Opportunity	Closed
Content syndication (How to Choose a Marketing Automation Platform eBook), February 2020	\$35,000	50	33	15	8	5 (value = \$375,000)
Activity 2						
Activity 3						
Activity 4						
Activity 5						
Activity 6						



Product launch at-a-glance

Use this template to quickly communicate your product launch plan.

Product : Product #1

Email Tactics	Content	Events	Lead Generation Tactics
Welcome Email	Ebook	Webinar 1	Social
Nurture Series	Cheat Sheet	Webinar 2	PPC Campaign
Deal Acceleration Email	Datasheet	In-Person Event	Paid Email Campaign
	Blog Post	In-Person Event1	Direct Mail
	Product Releases		Sales Call-Down
	Ebook		SEO

Need more?

You can find more planning resources on our website.

Download:

- The Definitive Guide to Pipeline Marketing:
<https://www.marketo.com/definitive-guides/the-definitive-guide-to-pipeline-marketing/>
- Demand Planning Model
<https://engage.marketo.com/Demand-Planning.html>
- Webinar: Secrets to Creating Killer Emails
<https://www.marketo.com/webinars/the-email-circle-of-life-secrets-to-creating-killer-emails/>





Thank You

