



The New HG Marketing Planner

User Guide



Simplify the process



Improve Visibility



Build consistency



Streamline production



Marketing Planner

Sign in to access your marketing campaigns and planning tools.

 Sign in with Microsoft

By signing in with Microsoft, you consent to authentication managed by Microsoft Azure AD. Your login details are never collected or stored by us.

Logging In & Access

How to access

- Go to <https://planner.hakimgroup.co.uk/>
- Click “**Sign in with Microsoft**” and use your HG credentials.
- If you manage multiple practices, use the Practice Switcher (top right) to toggle between your locations.



Once you login

When you log in, you'll land on the **Select Marketing Campaigns** tab — your main dashboard for browsing and adding campaigns to your plan.

Elements on page:

- **Tutorial video** – embedded at the top. We recommend watching this first for a 2-minute walkthrough.
- **Main toggle button** – to move between the select marketing campaigns and your sections
- **Get Started buttons** – Quick Populate, Guided Populate.
- **Select Marketing Campaigns area** – showing campaigns you can select, and buttons for bespoke campaigns.

The screenshot displays the 'Marketing Planner' dashboard. On the left is a sidebar titled 'Filters & Views' containing sections for 'View Mode' (Cards selected, Table), 'Date Range' (From/To date pickers), 'Activity', 'Objectives', 'Categories', and 'Plan Display' (Hide placed items toggle). A 'Clear All Filters' button is at the bottom of the sidebar. The main content area features a 'Welcome To Marketing Planner' message with a 'Watch Tutorial' button and a 'FAQs + User Guide' link. Below this is a 'Select Marketing Campaigns' section with a 'Practice Selections' toggle. The 'Aaron Optometrists - Select Campaigns' header is followed by 'Browse and add campaigns to your plan' and a 'Cards View' toggle. A search bar is present, and it shows 'Showing 73 campaigns'. Three campaign cards are visible: '2 for 1 - with a brand', 'A-Boards', and 'Allergy and Dry Eye', each showing availability and activity details.

Filters & Views

View Mode

☒ Cards

☐ Table

Date Range

From

To

Activity

- ☐ Brand Activation
- ☐ Campaign
- ☐ Evergreen

Objectives

- ☐ ADV
- ☐ Conversion
- ☐ Recurring Revenue
- ☐ Seasonal
- ☐ Volume

Categories

- ☐ Kids
- ☐ Offers
- ☐ Products
- ☐ Seasonal

Selecting Marketing Campaigns

Browse available campaigns curated by the central marketing team. Each campaign card includes a title, summary, objectives.

You can view these campaigns in:

- **Card View:** visual and quick to scan for inspiration
- **Table View:** structured and useful for sorting by date or objective

Once you've found a campaign that fits your marketing goals, you can click on it to see more details or add it straight to your plan.

Filtering Campaigns

Use the filters at the top to narrow down your selection:

- **Date Range:** See campaigns running during specific months or quarters.
- **Activity Type:** Filter by Brand Activation, Campaign, or Evergreen.
- **Objective:** Choose campaigns focused on Volume, Conversion, or Average Order Value.
- **Category:** Focus on areas such as Frames, Lenses, Contact Lenses, or Services.

These filters make it easier to build a balanced year-round plan that supports your practice objectives.



Adding Campaigns To Your Plan

Once you've chosen a campaign, click "Add to Plan."

- Then the date section will appear – then Select the dates you'd like to run it — within the campaign's available window.
- Confirm your selection.
- The campaign will automatically populate in your Practice Selections tab and calendar.

Black Friday Available

This campaign helps your practice drive patient traffic with timely, compelling promotions on eyewear and contact lenses.

Availability
From November 1st, 2026 to November 30th, 2026

Objectives
ADV Volume Conversion

Categories
Offers Products

Description
This campaign helps your practice drive patient traffic with timely, compelling promotions on eyewear and contact lenses. By highlighting exclusive Black Friday deals, you can attract both existing and new patients, boost in-store sales, and position your practice as the go-to destination for stylish, high-quality eyewear at great value.

More Information
We don't have the current artwork for this yet, but please see similar campaigns that have rolled out in the past.

SharePoint: Sales(2)

Select Campaign Dates
Set the date range for "Black Friday"

Start Date 01 Nov 2026 **End Date** 30 Nov 2026

Duration: 30 days

Quick Options
1 Week 2 Weeks 1 Month 2 Months 3 Months

Campaign Schedule:
Sunday, November 1st, 2026 → Monday, November 30th, 2026


Cancel Add to Calendar

+ Add to Plan



⚡ Quick Populate - Choose Your Tier

Select a campaign tier that matches your budget and marketing goals for [Test Practice 1](#). Selecting a tier will pre-populate your 2025 calendar; you can edit or remove items anytime. ×

**Good**

Basic

Essential campaigns to get started

4

Campaigns

1

Activations


Strategy Snapshot

Essential foundations to stay visible all year — quarterly campaigns, core assets, light community activity.

Recommended Annual Budget:
£1,500 (flex up/down based on asset and activation scope).

Includes:

- ☆ 4 campaigns for the year
- ☆ Always-on: Google Reviews Pack (all year)
- ☆ 1 seasonal event

**Better**

Standard

Balanced mix for steady growth

7

Campaigns

2

Activations


Strategy Snapshot

Balanced calendar for steady growth — more campaigns, stronger windows/POS, and one or two standout activations.

Recommended Annual Budget:
£2,500 (flex with bespoke assets or local media).

Includes:

- ☆ 7 campaigns for the year
- ☆ Always-on: Google Reviews Pack + light monthly social (all year)
- ☆ 1 seasonal event and 1 brand activation

**Best**

Premium

Maximum impact with always-on strategy

10

Campaigns

4

Activations

Strategy Snapshot

Always-on, growth-focused presence — multiple campaigns per quarter, premium creative, events and targeted media.

Recommended Annual Budget:
£3,750+ (flex for event scale, production and paid activity).

Includes:

- ☆ 10 campaigns for the year
- ☆ Always-on: Google Reviews Pack + monthly pulses (all year)
- ☆ 2 seasonal events and 2 brand activations

Cancel

Continue with

Quick Populate

If you'd rather start from a pre-selected foundation, choose **Quick Populate**.

You'll be presented with three starting templates: **Good**, **Better**, and **Best** each providing a different level of activity.

- **Good | Essentials Plan**
This is the simplest and most lightweight option. Perfect for practices that want to stay consistently visible throughout the year without committing to a large volume of activity.
- **Better | Balanced Plan**
Practices looking to maintain more brand presence, A more rounded and flexible option, ideal for practices looking to drive moderate growth through a consistent mix of brand, product, and community activity.
- **Best | Growth Plan**
Adds deeper campaign coverage with more activity across all categories, for practices that want to lead in their local market, and build strong patient engagement through consistent communications.

Tips:

Think of Good/Better/Best as your “starter for ten”. You can still make changes afterwards.



Guided Populate

The most flexible option if you want help picking the right mix.

1. Choose **Guided Populate**.
2. Answer 4–6 quick questions about your goals (e.g. “Focus on growth or retention?”, “Interested in digital ads?”, “Do you run local events?”).
3. The system will suggest a selection of campaigns tailored to your answers.
4. You can then remove anything that you aren’t sure about.
5. Not quite right? Click **Re-run Questions** to refine your plan.

Guided Campaign Selection

Answer a few questions to get personalized campaign recommendations for [Test Practice 1](#)

Clinical Services Emphasis
How much focus do you want on clinical and eye health campaigns?

Low Priority 50% High Priority

Frame Product Emphasis
How important are frame-focused campaigns for your practice?

Low Priority 50% High Priority

Lens Product Emphasis
What priority should lens-focused campaigns have?

Low Priority 50% High Priority

Contact Lens Emphasis
What priority should contact lens campaigns have?

Low Priority 50% High Priority

Event Readiness
Are you ready to run time-sensitive promotional events?

No ☐

Supplier Brand Participation
Do you want to include campaigns featuring specific supplier brands?

No ☐

Local Seasonality Focus
Should campaigns align with your local seasonal patterns?

No ☐

Kids
Would you like children focused campaigns?

No ☐

Activity Level
How active do you want your marketing calendar to be?

Couple campaigns Moderate activity Constant campaigns

Preview Your Focus

Clinical Focus: 50%

Frame Focus: 50%

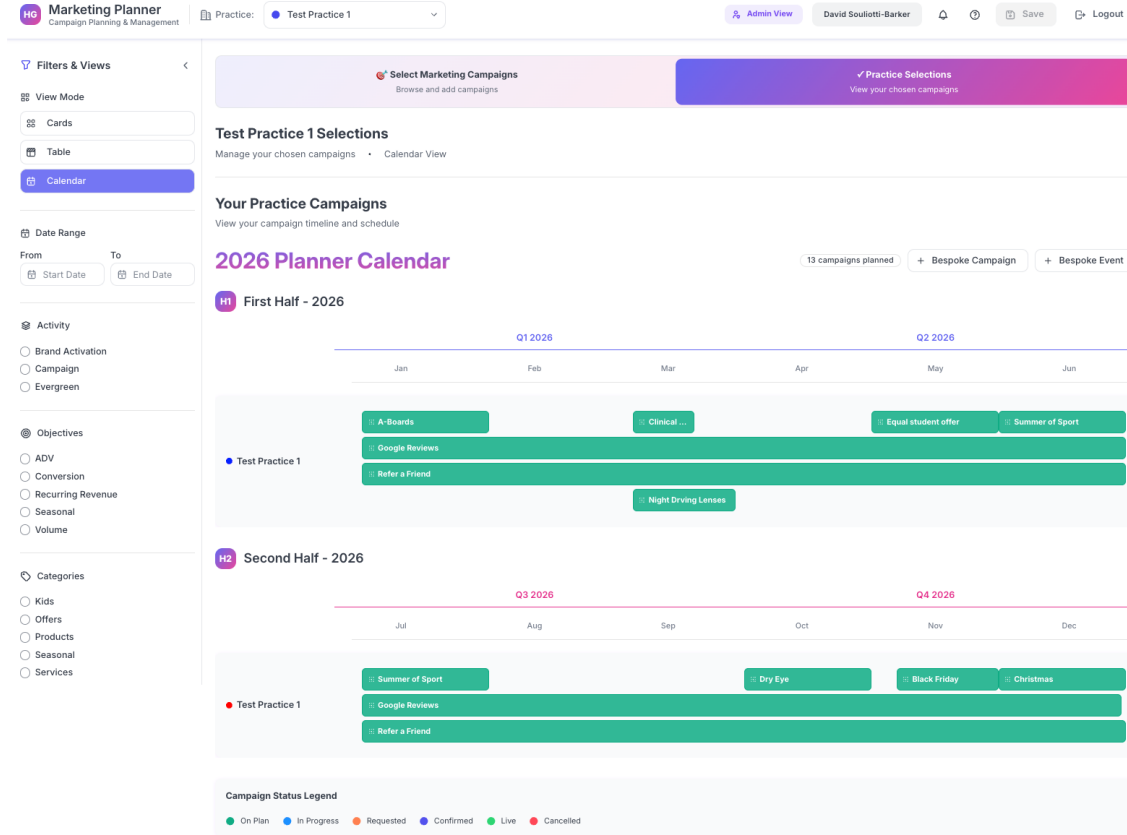
Lens Focus: 50%

Contact Lens Focus: 50%

Activity Level: Moderate activity

EventReady x SupplierBrand x Seasonal x Kids x

[Cancel](#) [Get Recommendations](#)



Your Practice Campaign Sections

Showing everything you've chosen, campaigns, events, and bespoke activity, in one place.

Choose your view:

- **Card** – quick visual tiles with title, dates, objective & status. Click to edit.
- **Table** – spreadsheet-style for sorting, filtering, and fast edits.
- **Calendar** – month-by-month view; spot gaps/overlaps

What you can do here:

- Review all items by **status**
- **Add** campaigns or bespoke events; **edit** timings; **remove** anything you don't need.
- **Filter** by objective/type to focus your plan; open items to see details and linked assets.



Notifications

The **Notifications tab** is currently not been opened, while we are focusing on the planning stage, but will open shortly as the next step in the Planner rollout.

In this area is where you'll confirm your planned selections and then preview and confirm the final artwork through:

- **Confirm campaign form** – select exactly what you'd like produced from your planned campaign, including quantities and formats (e.g. posters, flyers, window vinyls, or social graphics).
+ **Add any additional placements** – choose if you'd like to include extra channels such as Meta Ads, Google Ads, or website landing pages.
- **Review and confirm artwork form** – once artwork is complete you'll see a preview of your campaign and be asked to confirm your final assets.

The screenshot displays the 'Notifications' section of a software interface. At the top, there's a header with the title 'Notifications' and a red badge indicating '5 Unread' messages. To the right of the header is a user profile for 'Sarah Johnson' with a help icon. Below the header, there are two main tabs: 'Notifications' (highlighted in blue) and 'Status Dashboard' (light purple). The 'Notifications' tab shows a list of messages with filters for Practice, Type, Status, Campaign, Start Date, and End Date. The list contains four notifications, each with a title, description, timestamp, campaign name, and a confirmation button.

Practice	Type	Status	Campaign	Start Date	End Date
All Practices	All Types	All	All Campaigns	dd/mm/yyyy	dd/mm/yyyy

7 of 7 notifications

Newest first

- Final artwork ready for approval**
Updated Summer Promotion artwork incorporating your feedback is ready for final approval.
Oct 15, 2025 10:50 AM | Summer Promotion | Artwork Confirmation
- Artwork confirmation required**
Spring Eye Care Campaign artwork is ready for your review and approval.
Oct 15, 2025 10:20 AM | Spring Eye Care Campaign | Artwork Confirmation
- New bespoke campaign request**
Spring Frame Launch Campaign assets have been requested including social media graphics, email templates, and in-store displays.
Oct 15, 2025 9:20 AM | Spring Frame Launch Campaign | Bespoke Request
- Asset selection required**
Summer Eyewear Collection campaign needs asset selection to proceed with design work.
Oct 15, 2025 7:20 AM | Summer Eyewear Collection | Campaign Submission



Notifications

Campaign Updates and Messages

5 Unread

Sarah Johnson

?

Notifications

Messages and updates

Status Dashboard

Campaign status tracking

Campaign Status Dashboard

Track and manage campaign actions across all practices

Practice	Campaign	Section	Status	Start Date	End Date	Action
Downtown Vision Center	Varifocals – Aspire	Brand activations	Live	Jan 01, 2026	Jan 31, 2026	HG Team
Downtown Vision Center	2 for 1 – with a brand	Brand activations	Confirmed	Jan 01, 2026	Jan 31, 2026	Action complete
Downtown Vision Center	Winter Sports	Brand activations	In progress	Feb 01, 2026	Feb 28, 2026	Action complete
Downtown Vision Center	Lens Promotions	Always-on	On plan	Mar 01, 2026	Mar 31, 2026	HG Team
Downtown Vision Center	Allergy and Dry Eye	Brand activations	Requested	May 01, 2026	May 31, 2026	Action complete
Downtown Vision Center	Summer of Sport	Brand activations	Live	Jul 01, 2026	Jul 31, 2026	Action complete
Downtown Vision Center	Equal student offer	Brand campaigns	Confirmed	Sep 01, 2026	Sep 30, 2026	Practice Team
Downtown Vision Center	Black Friday	Brand activations	On plan	Nov 01, 2026	Nov 30, 2026	Practice Team
Suburban Family Eye Care	Peace of Mind	Always-on	Live	Apr 01, 2026	Apr 30, 2026	HG Team
Suburban Family Eye Care	Glasses Plan	Always-on	In progress	Apr 01, 2026	Apr 30, 2026	HG Team

Status Dashboard

The **Status Dashboard** gives you a clean, at-a-glance view of where every campaign is in the process and who owns the next step.

Each item shows a clear status (Planned, Requested, In Progress, Awaiting Review, Live) and a tag indicating **HG Team** or **Practice Team**. Use it to focus on actions marked for you, and click any campaign to open details, complete your step, or track updates.



In Summary

The HG Marketing Planner is here to make marketing simpler, clearer, and more connected — helping you plan campaigns, track progress, and manage everything in one place. It gives you a year-round view of your activity, easy ways to confirm assets, and full visibility of what's happening next.

If you have any questions or need support getting started, please get in touch with the team at **marketing@hakimgroup.co.uk** — we're here to help.



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