BrennSys Marketing Campaign Workbook

This workbook is designed to help create a marketing plan that gives measurable results based on our P.A.C.E. methodology – the same process we use to help our clients:
a) Increase the number of qualified leads
b) Increase the transaction and interaction per advert click-through
c) Increase the number of repeat visits per ad viewer, to increase engagement

Some of the worksheets have tables with summary calculations at the end of the table. If you need to insert more rows, insert them in the middle of the data entry fields so the sum formulas capture the new fields. Some of the worksheets have hidden rows or columns for formula calculations and deleting them will modify some of the features..

6.9.a Marketing Campaign Quantitative Goals

This worksheet will calculate how many marketing impressions or touches you need to reach the campaign goal, along with the total campaign conversion rate. This is the first metric required to calculate marketing ROI.

Results Calculates the total number of impressions you'll need, the total number of responses and all of the conversion rates throughout the sales process.

6.9.b Campaign Revenue / Profit Projections

This worksheet is linked to 6.9.a and will calculate the revenue and profit projections for the campaign. This is step 2 to calculating the campaign's projected ROI. THIS SHEET IS NOT USED FOR NOT-FOR-PROFIT PROJECTS.

Results Calculates the total projected revenue and profit produced from the campaign.

6.9.c Marketing Campaign Budget & ROI Analysis

This worksheet is linked to 6.9.a and 6.9.b (but can also function alone) and will organize the marketing campaign budget, project the initial ROI, and allow you to input actual results to view the actual campaign ROI. ROI IS NOT CALCULATED FOR NOT-FOR-PROFIT CAMPAIGNS

Results Calculates the total budget, projected campaign ROI, and the maximum you can spend and still hit the ROI goal. Also matches the projections to the actual results.

6.9.d Marketing Campaign Budget by Month

This worksheet is linked to 6.9.c and is a report that organizes the marketing campaign budget by month.

Results Calculates the total budget, projected campaign ROI, and the maximum you can spend and still hit the ROI goal. Also matches the projections to the actual results.

6.9.e Marketing Campaign Media Plan

This worksheet outlines the campaign media projections: media to use, cost, impressions, response and converstion rate.

Results Calculates the costs per impression, per response and per conversion.

6.9.f Campaign Results

Matches the campaign results to the original projections.

Results Calculates the revenue, profit or value of customers resulting from the campaign.

6.9.g Ad Response Rate Tracking

Allows you to track the media and response rates for future reference.

Results Averages the response rates for specific measurements.

6.9.h Campaign Variable Test Matrix

Allows you to record results from an a/b test.

Results Calculates the cost per success criteria for each ad.

6.9.i Improve Campaign Results

Review how improvements to specific campaign variables affect the campaign metrics and results.

Results Calculates how improved conversion rates impact the campaign.

Marketing Campaign Quantitative Goals

Inputs

Campaign Name	
Run Dates	
The Name	

Response rate: Of all of the people who see the ad, what % will respond?	

Define each specific step that prospects will go through until they buy.

Next steps	Describe the step a typical prospect will take. The first step is the action a prospect takes when s/he responds to the campaign.	Of those who reach this step, what % of them will move forward to the next?	Cumulative % of respondees who reach this step (calculated)
1			100%

Now establish the goals (a.k.a."quantitative objectives"). Choose a single goal from the list above.

In the table above, at what step does a prospect become a customer?		
At which step is the primary goal for the campaign?		
How many primary goals do you desire for the campaign?		

Results

Marketing Campaign Quantitative Goals Projection

Campaign Name	0.00%
Run Dates	0.00%
Prepared By	0.00%
Date	

Based on our conversion rate estimates, here's how many IMPRESSIONS & RESPONSES we'll need to generate in our campaign

in order to reach our goal:

Conversion rate estimate	0.00%
Total impressions needed	
Total responses needed	

Below is the breakdown of projected prospects at each step in our sales process:

Step	Step		Cumulative % of **respondees** who reach this step (calculated)	**# of prospects that should reach this step** (rounded up to next whole number)
1			100.00%	

Total customers we'll generate at these conversion rates	
% of our impressions that will reach our goal	
% of our impressions that become customers	

Campaign Revenue / Profit Projections

Inputs

Once you set the goals on the previous sheet, enter the estimates.

Campaign goals (from previous sheet)	Goal #	
	0	*These goals will apear here if you entered them in the previous worksheet. If not, enter them here.*
Number of new customers you should generate		

Now list the products and / or services that these customers may buy.

You'll also enter the price, the gross margin, and any additional expenses that should be deducted from the ROI.

Products / services an average customer in this group will buy	Revenue (price) per unit	Cost of Goods (COGs) per unit	Addl expenses*		Here's how much profit the company earns per unit
			Overhead allocation per unit*	Incremental expenses per unit*	
					$ -
					$ -
					$ -
					$ -
					$ -

Of the new customers you'll generate, what percentage will buy each of these products?

Products / services	% of new customers who buy this item	Total unit sales (Or just enter the total unit sales)	Total projected REVENUE	Total projected PROFIT
TOTAL	**0%**	**0.0**	**$ -**	**$ -**

(can be above 100% if they'll buy more than one item)

*If you've completed the Return on Investment section and have worked with the finance team to revise the formula you use to calculate ROI, you can enter additional expenses per unit below -- they will be deducted from Gross Profit in the ROI calculation

Campaign Revenue / Profit Projections

Campaign Name	0.00%
Run Dates	12/31/99
Prepared By	0.00%
Date	0

Products / services	% of new customers who buy this item	Total unit sales (Or just enter the total unit sales)	Total projected REVENUE	Total projected PROFIT
	0%			
	0%			
	0%			
	0%			
	0%			
TOTAL	**0%**	**0.0**	**$ -**	**$ -**

Marketing Campaign Budget & ROI Analysis

Campaign	
Date of budget	
Year the campaign starts	

Item	BUDGET				ACTUAL				NOTES
	Month incurred	Units	Cost per unit	Total (or enter total)	Month incurred	Units	Cost per unit	Total (or enter total)	
[enter a heading]	Choose				Choose				
				$ -				$ -	
				$ -				$ -	
				$ -				$ -	
				$ -				$ -	
				$ -				$ -	
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				$ -				$ -	

*Enter this total into the master budget in this month   **Total** $ - $ -   **Total**

Enter the projected revenue (from b, or enter manually)	$ -	
Enter the projected profit (from b, or enter manually)	$ -	
ROI for this budget and profit level		
What is the normal goal ROI/hurdle rate?		
Maximum you can spend on the campaign and still hit the goal ROI	$ -	

$ -	Variance in expenses
	% over (under)
	Enter the revenue you generated
	Enter the profit you generated
	ROI

Marketing Campaign Budget by Month

This sheet totals the expenses (from the previous sheet) so it's easy to enter into the master budget for the year.

Campaign	
Date of budget	

Month	Budget	Actual	NOTES
Jan		$ -	
Feb		$ -	
Mar		$ -	
Apr		$ -	
May		$ -	
Jun		$ -	
Jul		$ -	
Aug		$ -	
Sep		$ -	
Oct		$ -	
Nov		$ -	
Dec		$ -	
Jan 1		$ -	
Feb 1		$ -	
Mar 1		$ -	
Apr 1		$ -	
May 1		$ -	
Jun 1		$ -	
Jul 1		$ -	
Aug 1		$ -	
Sep 1		$ -	
Oct 1		$ -	
Nov 1		$ -	
Dec 1		$ -	
Total		**$ -**	

Marketing Campaign Media Plan

Plan the number of impressions for each media and project results and costs

How many impressions do you need/want to generate? (Pulls from a if you completed it.)	

Here are the number of impressions to generate, estimated costs and estimated conversion rates

Examples of media to use	Impressions	Costs		Response & conversion		Estimated # of responses		Cost projections			
	# of impressions planned	Cost per impression	OR Total cost for this media	Estimated response rate	% of responses that will convert to the goal	# of responses	Conversion Results	TOTAL COST	Cost per impression	Cost per response	Cost per Conversion
				In a, you used 0.00%%							
Sales force											
Cold calling						-	-	$ - 0			
Sales activities						-	-	$ - 0			
Relationship activities						-	-	$ - 0			
Telemarketing											
Outbound calling						-	-	$ - 0			
Inbound call handling						-	-	$ - 0			
Internet											
Online advertising						-	-	$ - 0			
Email campaigns						-	-	$ - 0			
Organic search						-	-	$ - 0			
Paid search						-	-	$ - 0			
Webinars						-	-	$ - 0			
Viral campaigns						-	-	$ - 0			
Ongoing email newsletters						-	-	$ - 0			
Social media											
Trade shows & events											
Trade show exhibits or events						-	-	$ - 0			
Seminars or events you create						-	-	$ - 0			
Events you sponsor						-	-	$ - 0			
Publicity											
Product- or solution-related stories						-	-	$ - 0			
Distribute press releases (and optimize for the web)						-	-	$ - 0			
Speaking engagements						-	-	$ - 0			
Blogs						-	-	$ - 0			
Stories about the company						-	-	$ - 0			
Direct mail											
Simple sales letters or postcards						-	-	$ - 0			
Special mailpiece for a particular campaign						-	-	$ - 0			
Traditional media											
Print ads						-	-	$ - 0			
Yellow pages						-	-	$ - 0			
Radio						-	-	$ - 0			
Television								$ - 0			
Outdoor						-	-	$ - 0			
Total	-					-	-	$ - 0			
Over (under) goal											

Overall response	Conversion rate of responses

*May show slight discrepancy due to rounding

Campaign Results

Compares campaign results to original projections.

Campaign	
Date	

QUANTITATIVE RESULTS

Step	Explanation (from sheet a)	ACTUAL	GOAL (from a if used)	Variance	Over (under) goal
1					
2					
3					
4					
5					
6					

TOTAL UNITS, REVENUE AND PROFIT

If you prefer to track the number of new customers and their lifetime value, skip this chart and use the next.

Products / services	# of units sold	Revenue per unit (price)	Gross profit per product	TOTAL REVENUE	TOTAL PROFIT
			$ -		$ -
			$ -		$ -
			$ -		$ -
			$ -		$ -
			$ -		$ -
Total	-		Total	$ -	$ -
Projected			Projected		
Variance	-		Variance	$ -	$ -
Over (under)			Over (under)		

LIFETIME VALUE OF NEW CUSTOMERS

Customer segment	# of new customers	Lifetime value per customer*	Total profit in today's dollars
Total	-		$ -
Projected*			$ -
Variance	-		$ -
Over (under)			

*[Customer Lifetime Value can help]

Ad Response Rate Tracking

Tracks the response rates for various ads.

Success measurements used:

1	
2	
3	

#	Ad name	Publication	Description	Run date	Total impressions	Total TARGETED impressions	Number of responses			Response rate (of TARGETED impressions)		
							Measurement 1	Measurement 2	Measurement 3	Measurement 1	Measurement 2	Measurement 3
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
21												
22												
23												
24												
25												
						CURRENT AVERAGE						

Campaign Variable Test Matrix

Evaluate two different ads to see which generates better results. Test one distinct variable at a time

Campaign

Test dates

Purpose of test

Ad #1   **Ad Description**

Ad #2   **Changes from Ad #1**

Criteria to measure success on the campaign
For example, number of information requests or number of orders.

Success criteria 1

Success criteria 2

Results

	AD #	
	1	**2**
Success criteria 1		
Success criteria 2		
Total cost of the ad		

Cost analysis

Cost per		
Cost per		

Improve Campaign Results

Displays how improved conversion rates can impact costs and results.

Campaign
Date
Media cost of campaign   Don't include ad production costs

Results	Enter the number you achieved	Conversion rate (of previous step)	Conversion rate (of total impressions)

Improvement goals

With improved conversion rates, here are the results be with the same # of impressions.

Results	Conversion rate (of previous step)	GOAL	# of responses you'd generate at goal rate
			-
			-
			-

Cost comparisons
Here are the resulting costs of the improvements.

Goal	Cost per goal in	
	Current scenario	Improved scenario