

performancemarketing.expert checklist #5:

planning the offer, promotion & copy

Part 1: The General Checklist

The worksheet below is a general checklist. It is also a suggested form for planning and specifying major characteristics and elements of your performance marketing promotion.

But it is general, and you will have to get down to more detail, using other forms and lists supplied here for many of the items.

However, this checklist will serve you well as a preliminary planning tool and reminder of some key considerations. Refer to it repeatedly as you build your performance marketing promotion, to ensure that you have not allowed anything to slip between the cracks.

Each item has two boxes, one on the left and another on the right. Use the box on the left to decide what items you plan to incorporate or utilize in your offer. Use the one on the right to verify that you have done so.

You can also use this form as a guide for others. Check off the left-hand boxes as your specifications, and have them check the right-hand boxes as they complete each task.

INSTRUCTIONS: Check left-hand boxes to remind yourself (or others working on your campaign planning) of items to consider. Check right-hand boxes for items as you implement your planning and/or to have others certify such implementation and compliance.

<input type="checkbox"/>	Know who your target is	<input type="checkbox"/>	<input type="checkbox"/>	Make copy easy to read and dramatic	<input type="checkbox"/>
<input type="checkbox"/>	Choose a strategy	<input type="checkbox"/>	<input type="checkbox"/>	Use charts and graphs	<input type="checkbox"/>
<input type="checkbox"/>	Decide what your offer is	<input type="checkbox"/>	<input type="checkbox"/>	Offer free gifts	<input type="checkbox"/>
<input type="checkbox"/>	Focus on the main promise	<input type="checkbox"/>	<input type="checkbox"/>	Offer discounts	<input type="checkbox"/>
<input type="checkbox"/>	Tell your story in the headline	<input type="checkbox"/>	<input type="checkbox"/>	Close frequently	<input type="checkbox"/>
<input type="checkbox"/>	Add a reasonable number of benefits	<input type="checkbox"/>	<input type="checkbox"/>	Make messages informal and friendly	<input type="checkbox"/>
<input type="checkbox"/>	Quantify	<input type="checkbox"/>	<input type="checkbox"/>	Make it easy to order	<input type="checkbox"/>
<input type="checkbox"/>	Prove your case	<input type="checkbox"/>	<input type="checkbox"/>	Eliminate risk	<input type="checkbox"/>
<input type="checkbox"/>	Use more than one touch	<input type="checkbox"/>	<input type="checkbox"/>	Use a P.S. in your messages	<input type="checkbox"/>
<input type="checkbox"/>	Tell the whole story	<input type="checkbox"/>	<input type="checkbox"/>	Don't be a comic	<input type="checkbox"/>
<input type="checkbox"/>	Overwrite, then boil it down	<input type="checkbox"/>	<input type="checkbox"/>	Don't be clever	<input type="checkbox"/>
<input type="checkbox"/>	Make it all good news	<input type="checkbox"/>	<input type="checkbox"/>	Tell the price	<input type="checkbox"/>

Part 2: Defining the Target Population Checklist

Identifying your target – your intended buyer – precisely is important in many ways, especially in deciding what Facebook audience, email or direct mail lists and/or other media to use, what to offer, and otherwise planning and assembling your campaign. (E.g., you would not use TV spots on the late, late show to reach teenagers, nor would you use fear motivation in appealing to children.)

The checklist below is intended to help you think this matter through and sketch in some identifiers of your target population.

INSTRUCTIONS: Check left-hand boxes to remind yourself (or others working on your campaign planning) of items to consider. Check right-hand boxes for items as you implement your planning and/or to have others certify such implementation and compliance.

Gender					
<input type="checkbox"/>	Male	<input type="checkbox"/>	<input type="checkbox"/>	Female	<input type="checkbox"/>
Age Groups					
<input type="checkbox"/>	Children	<input type="checkbox"/>	<input type="checkbox"/>	Teenagers	<input type="checkbox"/>
<input type="checkbox"/>	Young adults	<input type="checkbox"/>	<input type="checkbox"/>	Mature / middle-aged adults	<input type="checkbox"/>
<input type="checkbox"/>	Senior citizens	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Occupations					
<input type="checkbox"/>	Students	<input type="checkbox"/>	<input type="checkbox"/>	Housewives	<input type="checkbox"/>
<input type="checkbox"/>	Blue collar	<input type="checkbox"/>	<input type="checkbox"/>	White collar	<input type="checkbox"/>
<input type="checkbox"/>	Craft workers	<input type="checkbox"/>	<input type="checkbox"/>	Professionals	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Miscellaneous					
<input type="checkbox"/>	Home owners	<input type="checkbox"/>	<input type="checkbox"/>	Apartment dwellers	<input type="checkbox"/>
<input type="checkbox"/>	City residents	<input type="checkbox"/>	<input type="checkbox"/>	Suburbanites	<input type="checkbox"/>
<input type="checkbox"/>	Rural residents	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>

Part 3: Planning Basis of Communication Strategy Checklist

Communication strategy is critical to performance marketing success. At the same time, a checklist for devising a sales or marketing communication strategy is difficult to provide, except in general terms because strategic possibilities are usually so numerous and varied.

However, it is possible to offer some ideas and suggestions for at least the basis of strategies – basic motivators, for example – to start thinking on the subject.

Worksheet below does that, and provides spaces for writing in ideas as well. Incorporated inevitably in your ideas for this worksheet and checklist are other considerations – your offer, the main promise, and the chief feature to be included in your headline.

INSTRUCTIONS: Check left-hand boxes to remind yourself (or others working on your campaign planning) of items to consider. Check right-hand boxes for items as you implement your planning and/or to have others certify such implementation and compliance.

	Fear as the main motivator			Gain as the main motivator	
<input type="checkbox"/>	Embarrassment	<input type="checkbox"/>	<input type="checkbox"/>	Making money	<input type="checkbox"/>
<input type="checkbox"/>	Health	<input type="checkbox"/>	<input type="checkbox"/>	Getting education	<input type="checkbox"/>
<input type="checkbox"/>	Accident	<input type="checkbox"/>	<input type="checkbox"/>	Learning a trade	<input type="checkbox"/>
<input type="checkbox"/>	Failure	<input type="checkbox"/>	<input type="checkbox"/>	Being popular	<input type="checkbox"/>
<input type="checkbox"/>	Money loss	<input type="checkbox"/>	<input type="checkbox"/>	Being more attractive	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>

Part 4: Planning Proofs of Offer Checklist

No matter how appealing your offer, you must prove to your prospect that you can and will make good on your promise. Worksheet below offers some ideas for items that prospects will usually accept as such proof.

INSTRUCTIONS: Check left-hand boxes to remind yourself (or others working on your campaign planning) of items to consider. Check right-hand boxes for items as you implement your planning and/or to have others certify such implementation and compliance.

<input type="checkbox"/>	Logic / rational argument	<input type="checkbox"/>	<input type="checkbox"/>	Charts, graphs, infographics	<input type="checkbox"/>
<input type="checkbox"/>	Professional reviews	<input type="checkbox"/>	<input type="checkbox"/>	Text testimonials	<input type="checkbox"/>
<input type="checkbox"/>	Photos, esp. before/after shots	<input type="checkbox"/>	<input type="checkbox"/>	Audio testimonials	<input type="checkbox"/>
<input type="checkbox"/>	Official documents	<input type="checkbox"/>	<input type="checkbox"/>	Video testimonials	<input type="checkbox"/>
<input type="checkbox"/>	Citations from documents	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>

Part 5: Ideas For Gifts and Discounts Checklist

Worksheet below offers ideas for extra motivators, items intended to help close hesitant prospects. Of course, the extra motivators should be appropriate to whatever it is you are selling.

For example, in the past correspondence schools selling technical courses often gave the student-enrollee a slide rule as a gift. Then those schools would have offered a free calculator, since pocket calculators had made slide rules obsolete. And now non-expensive tablets or ebook readers would be a better fit.

INSTRUCTIONS: Check left-hand boxes to remind yourself (or others working on your campaign planning) of items to consider. Check right-hand boxes for items as you implement your planning and/or to have others certify such implementation and compliance.

Gift items					
<input type="checkbox"/>	Luggage	<input type="checkbox"/>	<input type="checkbox"/>	Digital clocks	<input type="checkbox"/>
<input type="checkbox"/>	Digital weather stations	<input type="checkbox"/>	<input type="checkbox"/>	Subscriptions	<input type="checkbox"/>
<input type="checkbox"/>	Books	<input type="checkbox"/>	<input type="checkbox"/>	Wallets	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Discounts					
<input type="checkbox"/>	Package prices	<input type="checkbox"/>	<input type="checkbox"/>	For prompt ordering	<input type="checkbox"/>
<input type="checkbox"/>	Special coupons	<input type="checkbox"/>	<input type="checkbox"/>	For order above \$X	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>

Part 6: Miscellaneous Checklist

Worksheet below offers ideas for extra motivators, items intended to help close hesitant prospects. Of course, the extra motivators should be appropriate to whatever it is you are selling.

INSTRUCTIONS: Check left-hand boxes to remind yourself (or others working on your campaign planning) of items to consider. Check right-hand boxes for items as you implement your planning and/or to have others certify such implementation and compliance.

There are a number of miscellaneous items to consider such as ways to make it easy for the customer to order and ways to break the price to the customer as gently and as diplomatically as possible. Many of these performance marketing subjects do not merit a

worksheet or checklist of their own, but some can be combined in one miscellaneous checklist, as in the worksheet below.

Making it easy to order					
<input type="checkbox"/>	Seperate order form	<input type="checkbox"/>	<input type="checkbox"/>	Credit card ordering	<input type="checkbox"/>
<input type="checkbox"/>	Toll-free phone	<input type="checkbox"/>	<input type="checkbox"/>	Cash on delivery ordering	<input type="checkbox"/>
<input type="checkbox"/>	Pre-populated form (customer hits submit button only)	<input type="checkbox"/>	<input type="checkbox"/>	Bill me later scheme	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Revealing the price					
<input type="checkbox"/>	Break the price into weekly or daily rate	<input type="checkbox"/>	<input type="checkbox"/>	Unitize it on some other basis	<input type="checkbox"/>
<input type="checkbox"/>	Accept payment schedule	<input type="checkbox"/>	<input type="checkbox"/>	Make apples to oranges comparison	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Eliminating risk					
<input type="checkbox"/>	Money-back guarantee	<input type="checkbox"/>	<input type="checkbox"/>	Guarantee of results	<input type="checkbox"/>
<input type="checkbox"/>	Free trial period	<input type="checkbox"/>	<input type="checkbox"/>	Delayed/deferred payment	<input type="checkbox"/>
<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>