Marketing Plan Template

Please copy and fill in for each campaign/product/event

Campaign / Event Title / Webinar Name:
Project overall timeline:

Goals:
Overall Measurement of Success:

Audience:
Budget:

Marketing Strategy Team Primary Point of Contact:
C&C Requestor:
Content Approver(s):

Important Dates:

- Deadlines
- Event/product launch/campaign launch dates (if event include time and time zone)

Boilerplate Language:
This should be language that could be adapted by all parties contributing to the promotion of this campaign/product/event. While each format should be adapted for ideal wordcount and best practices, everyone should be pulling from a shared language that has been approved by leadership in order to streamline the promotion creation process.

Data Sharing Agreement Considerations:
All partnerships with external partners should use a data sharing agreement and/or approved language on sign-up forms to capture people in EveryAction. Nearly all projects should include a way to sign people up or get them into our system somehow.

Deliverables
Not everything below is needed for every project, but everything below should be considered on each project to see if it fits the objectives. Each deliverable should have a KPI consideration as well.

Email
Pre-promotion
- Announcement Email **[date] [audience including exclusions]**
- Reminder Email **[date] [audience including exclusions]**
- Kicker Email **[date] [audience including exclusions]**
- Zombie Emails **[dates] [audience including exclusions]**
- Monthly national newsletter inclusion **[date]** National Audience
- Monthly engagement newsletter inclusion **[date]** National Audience
- Monthly MAID newsletter inclusion **[date]** National Audience

Post-promotion
- Post Event Recap/ICYMI Email **[date] [audience including exclusions]**
- Celebration Email (for fundraising) **[date] [audience including exclusions]**
- Thank You Email (events, fundraising) **[date] [audience including exclusions]**

Web Promotion
Pre-promotion
- Event listing **[date] [link]**
- Blog post **[date]** **only available if there is a writer able to provide content*
- Homepage hero feature **[date]** **should only be used for special items (see this doc)*
- Partner sites posting opportunities **[partner site] [person responsible]**
- New ever green web page creation (rare)
    - Addition to the website navigation (super rare)

Post-promotion
- Resources page **[date]**
- Webinar page **[date]**
- Blog post **[date]**

Social Media Organic

Pre-promotion

- National Facebook post **[# times planned to post] [dates]**
- National Facebook event **[dates]**
- National Facebook live event **[date] [day of point of contact]**
- National Facebook story **[date] [day of point of contact]**
- Regional Facebook post **[# times planned to post] [dates]**
- Affinity/Identity Group Facebook post **[# times planned to post] [dates]**
- Bluesky post **[# times planned to post] [dates]**
- Bluesky thread **[dates] [goal of thread]**
- Instagram post **[# times planned to post] [dates]**
- Instagram reel **[date]**
- Instagram story **[date]**
- LinkedIn post **[# times planned to post] [dates]**

Post-promotion

- Facebook post **[# times planned to post] [dates]**
- Regional Facebook post **[# times planned to post] [dates]**
- Affinity/Identity Group Facebook post **[# times planned to post] [dates]**
- Twitter post **[# times planned to post] [dates]**
- Twitter thread **[dates] [goal of thread]**
- Instagram post **[# times planned to post] [dates]**
- Instagram reel/story **[date]**
- LinkedIn post **[# times planned to post] [dates]**
- YouTube **[date to post recorded webinar]**

Social Media Organic Partners

- Ask participating partners (internal and external) to share on their personal social media channels
- Ask external organizations to share on their social media channels
- Cross-promote shared content created by external partners
- Examine if an influencer strategy is appropriate and who those partners could be

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Social Media Ads:
Please note that we don't have a budget to promote all events/products. Types of things we can prioritize

- National webinars with Leadership / Board Members
- Webinars with a fundraising goal
- Events/Webinars that address a PR concern
- Fundraising campaigns
- Major new initiatives
- Big legislative wins
- Access campaigns

Ad Platform: **[boost/paid ad] [Platform]**
Ad Listing Duration: **[Date range]**
Ad Spend Amount: **[Dollar amount]**

It is not recommended to use the Google Ads Grant for conversions. *Google Ads Grants should be used for marketing purposes high up the funnel (awareness, education). Social media ads are a better use of spending for conversions*

Internal Promotion
Is it useful to advertise to staff or to ask staff to spread the word?

- ITK [department that will include it] [date]
- All staff email [date] [sender] ONLY if asked to by a c-suite member.
- Slack general channel [date][person responsible for posting]
- All staff presentation
- Staff department meetings

Additional Partnership Considerations:

- Blogs on partner sites
- Logo on partner sites
- Data sharing agreements
- Listed in partner emails/newsletters
- Social media sharing plans
- Conversation with partner on what other opportunities they have to promote the content organically

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Earned Media Considerations:

- Press opportunities
- Blog placement on partner sites

Crisis Communications Plan:

Most webinars don't need a crisis communications plan. If you think this event may have heightened PR/crisis comms planning needs please reach out to Berly Laycox or Katie Titus to create a plan.