

Standard Operating Procedure (SOP): Promotion Planning and Objectives Setting

This SOP details the process of **promotion planning and objectives setting**, encompassing the identification of target audiences, defining clear and measurable promotional goals, allocating budgets, selecting appropriate marketing channels, scheduling campaign activities, and establishing key performance indicators. The aim is to ensure effective and aligned promotional efforts that drive brand awareness, customer engagement, and sales growth.

1. Purpose

To provide a structured approach for planning and setting objectives for promotional campaigns, ensuring alignment with overall business goals and maximizing campaign effectiveness.

2. Scope

This SOP applies to all marketing staff involved in the planning, execution, and assessment of promotional activities.

3. Process Overview

1. Identify Target Audiences

- Analyze market segments, customer profiles, and existing data.
- Select most relevant audience(s) for the campaign.
- Document target demographics and psychographics.

2. Define Promotional Objectives

- Set Specific, Measurable, Achievable, Relevant, Time-bound (SMART) goals.
- Examples include: increase brand awareness by 20% in Q3, acquire 1000 new customers, or boost sales of product X by 15%.

3. Budget Allocation

- Estimate campaign costs, including creative, media spend, and resources.
- Review available budget and allocate funds to each channel and activity as required.
- Obtain necessary approvals.

4. Select Marketing Channels

- Evaluate and select the most effective channels based on objectives and audience (e.g., email, social media, paid ads, events).
- Justify channel selection with data and prior performance if available.

5. Schedule Campaign Activities

- Develop a detailed campaign calendar including key activities, deadlines, and responsible parties.
- Ensure sufficient lead time for creative development, approvals, and deployment.

6. Establish Key Performance Indicators (KPIs)

- Identify metrics to track campaign performance and success against objectives (e.g., impressions, clicks, leads, conversions, ROI).
- Set targets for each KPI in the campaign plan.

7. Documentation and Communication

- Consolidate all plans, objectives, budgets, channels, schedules, and KPIs in a campaign brief or plan document.
- Share with all stakeholders for alignment and feedback.

4. Roles and Responsibilities

- **Marketing Manager:** Oversees the planning process, approves final objectives and budgets.
- **Marketing Executives:** Conduct research, develop proposals, and coordinate activities.
- **Finance:** Reviews and approves budget allocations.

- **Creative Team:** Delivers assets as per campaign requirements and schedule.

5. Review and Improvement

After campaign completion, analyze performance versus objectives and KPIs. Gather feedback to refine future promotion planning and objectives setting processes.

6. Related Documents

- Marketing Strategy Document
- Campaign Brief Template
- Budget Approval Form
- Post-Campaign Report Template