

# SOP Template: Promotion Period Monitoring and Performance Tracking

This SOP describes **promotion period monitoring and performance tracking** processes, detailing the systematic approach to oversee promotional campaigns, collect and analyze performance data, measure key performance indicators (KPIs), evaluate the effectiveness of marketing strategies, and generate reports for continuous improvement. The goal is to ensure promotional activities achieve desired outcomes, optimize resource allocation, and support informed decision-making throughout the promotion lifecycle.

## 1. Purpose

To establish standardized procedures for monitoring and tracking the performance of promotional campaigns, ensuring effective evaluation and continuous improvement of marketing initiatives.

## 2. Scope

This SOP applies to all marketing and analytics teams responsible for planning, executing, and evaluating promotional campaigns across all channels.

## 3. Responsibilities

- **Marketing Team:** Plan and execute promotions, track performance, and optimize campaigns.
- **Analytics Team:** Collect, analyze, and report on KPI data.
- **Management:** Review performance reports, make data-driven decisions, and approve optimization strategies.

## 4. Definitions

- **Promotion Period:** The defined timeframe during which a specific promotional campaign is active.
- **KPI (Key Performance Indicator):** Quantifiable measures used to gauge the success of a campaign.
- **Performance Tracking:** The process of collecting, analyzing, and reporting on data related to campaign outcomes.

## 5. Procedure

### 5.1 Planning and Documentation

1. Define the promotion's objective, timeframe, budget, and target KPIs (e.g., sales lift, website traffic, conversion rate).
2. Document the promotional campaign details and expected outcomes.

### 5.2 Promotion Period Monitoring

1. Monitor campaign execution and ensure all activities are performed as planned.
2. Track promotion progress regularly using dashboards, analytics tools, and sales data.
3. Document any issues or deviations encountered during execution for later analysis.

### 5.3 Data Collection and Performance Tracking

1. Collect data from various sources (e.g., sales systems, web analytics, CRM).
2. Ensure data integrity and accuracy by cross-verifying with source systems.
3. Segregate data by relevant dimensions (e.g., channel, product, geography).

### 5.4 KPI Measurement and Analysis

1. Calculate all predefined KPIs for the promotion period (*see example KPI table below*).
2. Analyze trends, anomalies, and areas of success or concern.
3. Compare performance against objectives and historical benchmarks.

### 5.5 Reporting and Continuous Improvement

1. Compile findings into a comprehensive performance report.

- 2. Present results to stakeholders with actionable insights and recommendations.
- 3. Hold a debrief to identify process improvements and update future promotion plans accordingly.

## 6. Example KPI Table

KPI	Definition	Target	Actual	Variance
Sales Lift (%)	Increase in sales during promotion vs. baseline	+15%	+17%	+2%
Website Visits	Total visits to promotion landing page	50,000	46,800	-3,200
Conversion Rate	Purchases divided by website visits (%)	3.5%	3.8%	+0.3%

## 7. Records and Documentation

- Promotion campaign plan and calendar
- Performance tracking logs
- KPI analysis and reports
- Post-campaign review and lessons learned

## 8. Revision History

Date	Version	Description	Author
2024-06-15	1.0	Initial SOP template release	Marketing Ops