

# 2018 Marketing Calendar & Planner



**Westamerica**  
Communications

# THE MARKETING PLAN

## ASSESS

Strengths • Weaknesses • Opportunities • Threats  
Performance • Competition • Environment

1

## REFINE

Vision • Mission • Key Strategies

2

## CREATE

Plans • Tactics • Promotional Offers

3



**DIRECT MAIL  
PROGRAMS**



**PRINT AND SOCIAL MEDIA  
ADVERTISEMENTS**



**ELECTRONIC MARKETING  
EMAIL • VIDEO • WEB**



**DIRECT SELLING  
COMMUNICATION TOOLS**



**RADIO & TELEVISION  
COMMERCIALS**



**DIGITAL AND TRADITIONAL  
MERCHANDISING MATERIALS**

## BUILD

Sales Goals • Profit Goals • Budgets • Exposure Goals

4

# GUIDELINES FOR SUCCESS

**MANY MEDIOCRE PROMOTION CONCEPTS SUCCEED** while more exciting “creative” concepts fail. Use this workbook for ideas and the promotion planning tool tips to help ensure a successful promotion.

## SUCCESSFUL PROMOTIONS FOLLOW THESE GUIDELINES:

- 1** Set specific, realistic objectives.
- 2** Evaluate costs vs. objectives to determine your promotion break even point.
- 3** Do the five basic pre-promotional analyses:
  - 1) Internal business analysis
  - 2) Competitive analysis
  - 3) User analysis
  - 4) Image analysis
  - 5) Market area analysis
- 4** Target clients in terms of demographics, needs, wants and “hot-buttons.”
- 5** Offer a REAL consumer benefit.
- 6** Determine the effective medium (direct mail, radio/TV, direct selling, email, social media, in-branch merchandising).
- 7** Deliver clear, simple messaging and graphics in your communication.
- 8** Develop a checklist of all necessary items required for your promotion, then follow it!
- 9** Develop a realistic timetable to allow for planning, creating, producing elements, preparing employees, decorating, etc. Allow time for unexpected delays.
- 10** Involve employees in appropriate aspects (decorating, suggestive selling, etc.) and get their buy-in!
- 11** Offer consumer or employee incentives where appropriate and allowed.
- 12** Create a daily review of results, problems, comments, and staff complaints then make adjustments as needed.
- 13** Review past promotional results and challenges to help you predict future opportunities.
- 14** Remember that people enjoy promotions. Make them fun!

***Many major promotions don't go far enough. More is better when it comes to signage, counter cards, decoration, flyers and employee posters as long as a single theme ties them all together.***

## HOW TO USE THIS WORKBOOK

- Review the entire workbook first to become familiar with the elements.
- Determine your planned sales objectives as identified by your senior management team.
- Enter these on your monthly worksheets.
- Use the *Monthly Project Plan* to identify your focus projects for each month. (pgs. 11–22)
- Use the *Promotion Plan Worksheet* to help you construct your promotion. (pgs. 7–8)
- Track and evaluate your promotional activity using the *Return on Marketing Investment Worksheet*. (pg. 9)
- Update your sales results and budgets on a monthly basis using the *Budget Recap Sections* on each month.

# THE PROMOTION REVIEW

**IN THIS SECTION** we have compiled all of the technical “must know” and “hard-to-read-through” facts that will help you construct a winning promotional program. So read on...follow these words and reap the benefits.

## WHAT A PROMOTION IS . . . AND ISN'T

### WHAT IT IS

One generally accepted definition of a promotion is this: *A special activity designed to accomplish a specific objective in a limited period of time.* Consumer promotions usually, but not always, offer a special value. However, they always offer an immediate benefit of some kind to the consumer.

### WHAT IT ISN'T

Everything which promotes sales isn't a sales promotion. If it was, then media advertising, public relations, and word-of-mouth would all come under the promotion umbrella. But that's not the case. These activities (including promotion) all come under the marketing umbrella. Promotion is just one of the key elements of an effective marketing program.

## PROMOTION AS PART OF THE MARKETING PROCESS

### THE ROLE OF PROMOTION IN MARKETING

***A promotion provides the tactical means of building immediate sales but these sales can lead to increased future sales within a specified time and possibly beyond.*** It also provides an opportunity to bring your marketing program to a greater local audience.

### YOUR PROMOTIONAL IMAGE

Promotions must advance the overall positioning and image of your company. It will reinforce the character of your company just as your advertising does.

### PROMOTIONS VS. ADVERTISING

Although most promotions benefit from advertising, promotions differ from advertising in that advertising's role is to:

- Provide information on the benefits of your company and product line.
- Persuade the potential user that your company/product is more desirable than others.

Advertising's role is to influence consumer attitudes over time. Promotions, on the other hand, are designed to illicit immediate action.

### AN INTEGRAL PART OF THE MARKETING PROCESS

Promotions should be programmed as part of your marketing planning process. A sales promotion should be strategically developed and organized. The five pre-promotion analyses should be developed to increase the success of a promotion.

# 5 BASIC PRE-PROMOTIONAL ANALYSES

## THE FIVE PRE-PROMOTIONAL STEPS

### 1. ANALYZE YOUR BUSINESS

Know your usage counts including the sales and profitability of each product and/or service. Understand the fundamental dynamics that increase your sales and profits.

### 2. ANALYZE CLIENTS

You should know your core clients, the ones that account for 75% of your business in terms of their demographics and psychographics. Which are most likely to be in your location at various times of the day or month or visiting your website? What do they want when they're at your locations? Evaluate your MCIF/CRM (Marketing Customer Information File/Customer Relationship Management system), identify what they currently use and where opportunities lie.

### 3. ANALYZE YOUR MARKET AREA (WHERE APPLICABLE)

Know the three-minute or three-mile radius that accounts for the lion's share of your business. Know where the retail business, offices, and residential areas are. Pinpoint hospitals, employers, civic buildings, clubs, schools and other potential targets for specialized promotions and potential development.

### 4. ANALYZE THE COMPETITION

Identify what your primary and secondary competition is offering in objective and realistic terms, and know what they're doing in their marketing communications programs. Knowing what your strengths and weaknesses are will help you develop effective strategic plans.

### 5. ANALYZE YOUR IMAGE

Using mystery shoppers, or user feedback mechanisms (surveys), show how your operation is perceived and in what areas you exhibit strength.

## WHEN AND WHY PROMOTIONS ARE USED

### PROMOTIONS HAVE A VARIETY OF USES

- To **encourage trial** of your products among non-clients and former clients
- To **stimulate repeat business** from present clients, and to build loyalty through promotional rewards
- To **increase your business** during specific times of the day, week, or month or increase usage of your website
- To **increase transaction activity** with cross-selling
- To **introduce a new product** to both current and potential consumers
- To **offset competitive advantages or activities**, and focus on you versus the competition
- To **capitalize on holidays, seasons or special events** building trust in your brand
- To **create an event** or **add excitement** several times a year
- To **stimulate employee enthusiasm** and involvement

# THE PROMOTION PROCESS

## *Planning, targeting, implementing, forecasting and measuring your promotions*

### PLANNING

#### REVIEW PAST PROMOTIONS

Before any new promotions are developed, make a thorough review of all of your prior promotions and *ask yourself* these questions:

- Which were most successful and why?
- Which were least successful and why?
- Which were unsuccessful for the wrong reasons? (Not enough lead time, poor employee communications, etc.)
- Which promotions that were marginally successful could be improved and reworked based on the knowledge gained during the promotion?
- Which of the successful promotions could be repeated, as is? (Tremendous savings in production costs can be realized if you modify an existing promotion. Keep in mind that only you and your fellow employees may be tired of the promotions.)

#### CHECK COMPETITIVE FILES

You should consider keeping a file of promotions by direct and indirect competitors. Review those you believe to be successful and make a brief analysis of why they succeeded. Consider how you would improve on these promotions and how you could adapt the basic concept to your own needs.

#### SUCCESSFUL PROMOTIONS ARE MOST OFTEN VARIATIONS ON A PROVEN THEME

Many promotions are effective because consumers “expect” a promotion to take place (Tax Time, Back-to-School, Seasonal, etc.). You can use these familiar promotional campaigns in developing your programs.

#### ESTABLISH PROMOTION OBJECTIVES

Set specific promotion objectives based on product profitability and sales potential. A promotion can accomplish more than one of the following objectives, but not all of them at once.

- Introduce a new or improved item or service
- Build loyalty by rewarding current clients
- Take advantage of seasons or special events
- Increase transactions during certain days or times during the day
- Attract new clients or bring back former clients
- Increase transaction counts
- Overcome seasonality of business
- Improve employee morale and efficiency

#### DEVELOP THE PROMOTION CONCEPT AND ELEMENTS

Ads, direct mail or other tools—which approach will best accomplish your objectives? Use the Promotion Plan Worksheet to help you construct a winning promotional program.

#### INVOLVE ALL STAFF MEMBERS IN THE PLANNING PROCESS

Team involvement is the key to successful promotions: let your staff members contribute ideas and suggestions to your overall promotional program.

### TARGETING

After determining your promotion objectives, the next step is selecting the audience you intend to reach. You can't be all things to all people, so you need to decide first if you want primarily to attract new clients or increase business from your present base. From there you can become more specific. Your target for the promotion can be:

- Senior citizens
- Families
- Businesses
- Employee groups
- Singles
- Ethnic groups
- Youth market
- Students

From your market data and personal experience determine which segments offer the greatest potential for increased sales. Determine what will appeal to the segments which have the greatest potential and which can be reached most efficiently.

# THE PROMOTION PROCESS

## IMPLEMENTATION

### TIMETABLES

Lead-time varies with the complexity of the promotion. Start with the date the materials are needed in the market and work backwards, allowing more than enough time for:

- Creative design and copy development
- Revisions
- Printing/production
- Training and merchandising to managers and employees
- Photography/art (if needed)
- Legal approvals (contests/sweepstakes)

**THE ONE RULE TO FOLLOW IS “ALWAYS ALLOW MORE TIME THAN YOU THINK YOU’LL NEED.” YOU’LL NEED IT!**

### EMPLOYEE INVOLVEMENT

Interested, committed employees are essential to a successful promotion. Your staff will suggest and sell a promotion if informed. If not, they’ll avoid the subject or even talk down the promotion. Steps to creating involvement:

- Staff rally
- Provide feedback to the employees on promotion results, both during *and* after the promotion. (If you’re playing a game, people want to know what the score is.)
- Staff incentives (group or individual)

### FREQUENCY AND DURATION

- **Frequency** – Major promotions (those involving more than a simple deal/discount on an existing product) should be introduced no more than three to four times per year. Simple discounts can be offered as often as monthly.
- **Duration** – Interest generally can be maintained from four to six weeks, although a few have been used successfully for as long as eight weeks. A minimum of four to six weeks should be allowed between major promotions.

### IMPLEMENTATION GUIDE

This guide should be presented at least two weeks before the start of a promotion and presented at a staff rally. Take the time to familiarize the staff with the following information:

- Objectives and goals
- Materials
- Responsibilities and expectations of each person involved
- Dates
- Instructions on how to implement
- Measurement techniques and forms

## FORECASTING AND MEASURING RESULTS

When planning a new promotion, you’ll have to make realistic projections of increased dollar volume and incremental profits based on previous experience. Project a break-even point for your promotion program by developing a range of expectations (best and worst anticipated results) in terms of added product volume and incremental profits. Compare this to your total fixed promotion costs. These costs will include some or all of the following:

- Creative services
- Advertising (space, time, mailing, etc.)
- Additional labor as a result of the promotion (temp support, overtime for processing, etc.)
- Production (art, photography, type, printing, etc.)
- Premiums (if applicable)
- Booth space, other fees

**Use the Promotion Plan Worksheet and the Return on Marketing Investment sheet to help you plan your requirements in line with your sales goals and profit expectations.**

## PROMOTION RISKS/DANGERS

Most promotions enhance the image and contribute positively to overall positioning. However, there are a few dangers inherent in various types of promotions which should be considered:

- Too many discount-oriented promotions will adversely affect your image
- Couponing too frequently tends to make people wait for the next promotion before buying
- Premiums are a big risk when you have to commit to buy merchandise in volume. Many elements are involved. Is it timely? Will it catch on?

# PROMOTION PLAN WORKSHEET

Project Name \_\_\_\_\_

Today's Date \_\_\_\_\_ Planned Promotion Date(s) \_\_\_\_\_

Brief Description of Objective(s) \_\_\_\_\_

\_\_\_\_\_

**Complete only those areas which are applicable to your promotion.**

## 1 PRODUCT(S) EMPHASIS

PRODUCT(S)	TOTAL UNIT GOAL	TOTAL \$ GOAL
_____	_____	_____
_____	_____	_____
_____	_____	_____

## 2 TARGET MARKET

- Existing Clients (specify \_\_\_\_\_)  Non-Clients
- Demographics (identify those that are appropriate) \_\_\_\_\_
- Combined Household Income Level \$ \_\_\_\_\_
- Ethnicity (if applicable) \_\_\_\_\_
- City and/or Zip Code(s) or Census Tract \_\_\_\_\_
- Age Range \_\_\_\_\_  Gender \_\_\_\_\_  Psychographics/Lifestyle \_\_\_\_\_
- Homeowners (\$ \_\_\_\_\_ assessed value; \_\_\_\_\_ yrs. residency; \_\_\_\_\_% LTV; \_\_\_\_\_% current mortgage)
- Other: \_\_\_\_\_

## 3 COMPETITIVE ADVANTAGE/BENEFIT/SPECIAL FACTORS

	DESCRIPTION
<input type="checkbox"/> Competitive pricing rates	_____
<input type="checkbox"/> Low fee/no service charge	_____
<input type="checkbox"/> Speed of service processing	_____
<input type="checkbox"/> Unique product or service feature	_____
<input type="checkbox"/> Event	_____
<input type="checkbox"/> Other	_____

## 4 MEDIA

### POINT-OF-SALE MATERIALS

		QTY.	SIZE
Posters:	<input type="checkbox"/> Easel Back <input type="checkbox"/> Lobby Display <input type="checkbox"/> Digital	_____	_____
	<input type="checkbox"/> Other: _____	_____	_____
Banners:	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	_____	_____
Buttons:	<input type="checkbox"/> Adhesive <input type="checkbox"/> Pin-Backed	_____	_____
Flyers:	<input type="checkbox"/> Flat <input type="checkbox"/> Folded	_____	_____
<input type="checkbox"/> Counter Card/Tent Cards	<input type="checkbox"/> Window Graphics	_____	_____
<input type="checkbox"/> Other _____		_____	_____



# PROMOTION PLAN WORKSHEET

## PRINT/DIGITAL ADVERTISING

Publication \_\_\_\_\_ Frequency of Publication \_\_\_\_\_  
Insertion Dates \_\_\_\_\_ Length of Run \_\_\_\_\_  
Publication \_\_\_\_\_ Frequency of Publication \_\_\_\_\_  
Insertion Dates \_\_\_\_\_ Length of Run \_\_\_\_\_

## DIRECT MAIL / EMAIL

All Names That Meet Target Criteria  Maximum Quantity

### EXECUTION

Email List  
 Postcard  
 Self-Mailer  
 Direct Mail Letter

### ELEMENTS

Copy/Design  
 Application (New Accounts)  
 Business Reply Mail / Web Landing Page (for response)  
 Tear-off Coupon (with special offer)

## TELEMARKETING

Branch Office  Corporate Call Center Estimated Number of Calls \_\_\_\_\_  
 Script Needed  Prospect List Needed

## EXHIBIT

Trade Show  Employee Group  
 Community Event Description \_\_\_\_\_

## ELECTRONIC

Web Banner Ads  Television  
 Email  Radio  
 Infographic  Social Media Sites  
 PURLs  Other \_\_\_\_\_

## PUBLIC / COMMUNITY RELATIONS

Press Release:  Announcing Event/Activity  Announcing Product/Service  
 Sources to Notify \_\_\_\_\_

## 5 ADDITIONAL NEEDS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## NOTES/SKETCHES

# RETURN ON MARKETING INVESTMENT

Promotion: \_\_\_\_\_ Date Started: \_\_\_\_\_ Date Completed: \_\_\_\_\_

GOAL		ESTIMATED		ACTUAL PRODUCTION	
FEATURED PRODUCT(S)	PROFITABILITY FACTOR*	SALES	PROFIT (DOLLARS)	SALES	PROFIT
_____	_____	_____	= _____	_____	= _____
_____	_____	_____	= _____	_____	= _____
_____	_____	_____	= _____	_____	= _____
<b>NORMAL VOLUME</b>		Est. Total _____	A	Actual Total _____	
FEATURED PRODUCT(S)	PROFITABILITY FACTOR*	SALES	PROFIT (DOLLARS)	LESS PROFIT FROM "NORMAL VOLUME"	
_____	_____	_____	= _____	_____	
_____	_____	_____	= _____	_____	
_____	_____	_____	= _____	_____	
		Normal Profit _____	B	Actual Incremental Profit _____	
		Anticipated Incremental Profit from Promotion _____	C	from Promotion _____	C
			(A-B)		(A-B)
<b>MARKETING COSTS</b>		<b>ESTIMATED</b>		<b>ACTUAL</b>	
Newspaper		\$ _____		\$ _____	
Direct Mail Printing		_____		_____	
Direct Mail Postage		_____		_____	
Direct Mail List		_____		_____	
Electronic Marketing		_____		_____	
Flyers		_____		_____	
Banners		_____		_____	
Posters		_____		_____	
Counter Cards		_____		_____	
Premiums/Giveaways		_____		_____	
Shipping		_____		_____	
Other (telemarketing, additional labor, radio, etc.)		_____		_____	
<b>TOTAL MARKETING COSTS</b>		\$ _____	D	\$ _____	
		Estimated		Actual	
		ROMI _____	(C ÷ D)	ROMI _____	(C ÷ D)

**Post-Promotion Evaluation** (Explain the factors leading to the success or failure of the program):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**To use the Return on Marketing Investment Sheet:**

Determine your planned sales volume of the product(s) you're featuring during the promotional period. Enter the profitability factor for each product and multiply that by your planned sales volume. This will determine your estimated profit from your promotion. Subtract the amount of profit from your normal everyday sales activity on these products (without promotion) to arrive at your anticipated **incremental profit** from running this promotion.

Identify your anticipated marketing costs and total these. Next, divide your total planned incremental profit (C) by your anticipated marketing (D) costs. This ROMI will give you an indication of how much profit you will generate for **each dollar** of marketing expense.

\*Ask your CEO or CFO to assist you in determining the profitability for your featured product or service. To correctly analyze your promotion success you will need to know how much profit is generated for each dollar of sales volume.

**JANUARY**

S	M	T	W	T	F	S
	<b>1</b>	2	3	4	5	6
7	8	9	10	11	12	13
14	<b>15</b>	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**FEBRUARY**

S	M	T	W	T	F	S
				1	<b>2</b>	3
4	5	6	7	8	9	10
11	<b>12</b>	13	<b>14</b>	15	<b>16</b>	17
18	<b>19</b>	20	21	<b>22</b>	23	24
25	26	27	28			

**MARCH**

S	M	T	W	T	F	S
				1	<b>2</b>	3
4	5	6	7	8	9	10
<b>11</b>	12	13	14	15	16	<b>17</b>
18	19	<b>20</b>	21	22	23	24
<b>25</b>	26	27	28	29	<b>30</b>	<b>31</b>

**APRIL**

S	M	T	W	T	F	S
<b>1</b>	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	<b>17</b>	18	19	20	21
<b>22</b>	23	24	<b>25</b>	26	<b>27</b>	28
29	30					

**MAY**

S	M	T	W	T	F	S
		1	2	<b>3</b>	<b>4</b>	<b>5</b>
6	7	8	9	10	11	12
<b>13</b>	14	<b>15</b>	16	17	18	<b>19</b>
<b>20</b>	21	22	23	24	25	26
27	<b>28</b>	29	30	31		

**JUNE**

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<b>10</b>	11	12	13	<b>14</b>	15	16
<b>17</b>	18	<b>19</b>	20	<b>21</b>	22	23
24	25	26	27	28	29	30

year at a  
**GLANCE** 2018

**JULY**

S	M	T	W	T	F	S
1	2	3	<b>4</b>	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
<b>22</b>	23	24	25	26	27	28
29	30	31				

**AUGUST**

S	M	T	W	T	F	S
			1	2	3	4
<b>5</b>	6	<b>7</b>	8	9	10	11
12	13	14	15	16	17	18
19	20	<b>21</b>	22	23	24	25
<b>26</b>	27	28	29	30	31	

**SEPTEMBER**

S	M	T	W	T	F	S
						1
2	<b>3</b>	4	5	6	7	8
<b>9</b>	<b>10</b>	<b>11</b>	12	13	14	15
16	<b>17</b>	18	<b>19</b>	20	<b>21</b>	22
<b>23</b>	24	25	26	27	28	29
30						

**OCTOBER**

S	M	T	W	T	F	S
	1	2	3	4	5	6
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14	15	<b>16</b>	17	18	19	20
21	22	23	24	25	26	27
28	29	30	<b>31</b>			

**NOVEMBER**

S	M	T	W	T	F	S
				1	2	3
<b>4</b>	5	<b>6</b>	7	8	9	<b>10</b>
<b>11</b>	<b>12</b>	13	14	15	16	17
18	19	20	21	<b>22</b>	<b>23</b>	24
25	<b>26</b>	27	28	29	30	

**DECEMBER**

S	M	T	W	T	F	S
						1
2	<b>3</b>	4	5	6	<b>7</b>	8
9	10	11	12	13	14	15
16	17	18	19	20	<b>21</b>	22
23	<b>24</b>	<b>25</b>	<b>26</b>	27	28	29
30	<b>31</b>					

# JANUARY 2018

Explore different media.



### Deliver your message in more than one format.

By exploring alternative media, you can capture additional opportunities for communicating with your audience. Television and radio spots, lobby videos, your website, email blasts, social media and other techniques will reach a wide variety of demographics at various times and places. Westamerica can handle all the details.

S	M	T	W	T	F	S
	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	26	27
28	29	30	31			

### DATES TO REMEMBER

- 01 | New Year's Day \_\_\_\_\_
- 15 | Martin Luther King, Jr. Day \_\_\_\_\_

### MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

### SALES PRODUCTION RECAP

#### MONTH

#### YTD

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

### BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# FEBRUARY 2018

Develop a consistent brand image.

## Apply the principles of successful branding.

What is a brand? Put simply, it is the unique image or personality of your particular company. By deliberately keeping that image consistent, you build recognition, trust and loyalty among consumers. Branding involves many different elements including choosing your mind-set, message and medium. Then you progress to graphics, fonts, color selection, copy, style guide and more. You can consult with Westamerica on large-scale branding efforts or small details such as logo design.



S	M	T	W	T	F	S
				1	<b>2</b>	3
4	5	6	7	8	9	10
11	<b>12</b>	13	<b>14</b>	15	<b>16</b>	17
18	<b>19</b>	20	21	<b>22</b>	23	24
25	26	27	28			

## DATES TO REMEMBER

- 02 | Groundhog Day \_\_\_\_\_
- 12 | Lincoln's Birthday \_\_\_\_\_
- 14 | Valentine's Day \_\_\_\_\_
- 14 | Ash Wednesday \_\_\_\_\_
- 16 | Chinese New Year \_\_\_\_\_
- 19 | Presidents' Day \_\_\_\_\_
- 22 | Washington's Birthday \_\_\_\_\_

## MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

## SALES PRODUCTION RECAP

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

## BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# MARCH 2018

Use emotional appeal.



### Craft your message in a way that compels a response.

It's good to explain the facts. It's better to describe benefits. And it's even better to clearly show someone how those benefits can make their life easier, more enjoyable, or more rewarding. To do this, you need just the right words, combined with just the right pictures to create just the right outcome. Westamerica has an amazing team of award-winning designers and copywriters. And now, they can be on your team, too.

### DATES TO REMEMBER

- 02 | Employee Appreciation Day \_\_\_\_\_
- 11 | Daylight Saving Time Begins \_\_\_\_\_
- 17 | St. Patrick's Day \_\_\_\_\_
- 20 | Spring Begins \_\_\_\_\_
- 25 | Palm Sunday \_\_\_\_\_
- 30 | Good Friday \_\_\_\_\_
- 31 | Passover \_\_\_\_\_

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18	19	<b>20</b>	21	22	23	24
<b>25</b>	26	27	28	29	<b>30</b>	<b>31</b>

### MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

### SALES PRODUCTION RECAP

#### MONTH

#### YTD

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
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_____	_____	_____	_____	_____	_____	_____

### BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

Highlight your strengths.

### Make the difference crystal clear.

Consumers are doing their homework these days. They are looking for points of distinction before deciding where to turn, and they're not afraid to shift their loyalty. So it's up to you to determine your unique selling points, and keep them right out front. Your Westamerica account representative is a powerful ally in this process, helping you define your advantages and communicating them effectively.



### DATES TO REMEMBER

- 01 | Easter Sunday \_\_\_\_\_
- 01 | April Fool's Day \_\_\_\_\_
- 17 | Tax Day \_\_\_\_\_
- 22 | Earth Day \_\_\_\_\_
- 25 | Administrative Professionals Day \_\_\_\_\_
- 27 | Arbor Day \_\_\_\_\_

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22	23	24	25	26	27	28
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### MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

### SALES PRODUCTION RECAP

MONTH

YTD

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
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_____	_____	_____	_____	_____	_____	_____

### BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# MAY 2018

Present an image of excellence.



### Reflect your standards of quality in your materials.

Quality always makes an impression, even on a subliminal level. High quality paper, crystal-clear image resolution, professional design, and other elements all work together to convey an image of excellence and professionalism, which in turn can boost response rates. With outstanding materials, a talented staff and state of the art printing capabilities, Westamerica's commitment to quality materials shows your own commitment to your consumer's needs.

### DATES TO REMEMBER

- 03 | National Day of Prayer \_\_\_\_\_
- 04 | Star Wars Day \_\_\_\_\_
- 05 | Cinco de Mayo \_\_\_\_\_
- 13 | Mother's Day \_\_\_\_\_
- 15 | Ramadan \_\_\_\_\_
- 19 | Armed Forces Day \_\_\_\_\_
- 20 | Pentecost \_\_\_\_\_
- 28 | Memorial Day \_\_\_\_\_

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<b>13</b>	14	<b>15</b>	16	17	18	<b>19</b>
<b>20</b>	21	22	23	24	25	26
27	<b>28</b>	29	30	31		

### MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

### SALES PRODUCTION RECAP

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
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### BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____



Outsource for efficiency.

**Manage your time and money  
by delegating effectively.**

Add Westamerica to your marketing team, and you will instantly add some of the brightest and best people interested in the success of your organization. Your account representative will coordinate each step of the process, so you can use your valuable time as efficiently as possible. You don't have to know how to do it all. You just have to know who to call.



**DATES TO REMEMBER**

- 10 | National Children's Day \_\_\_\_\_
- 14 | Flag Day \_\_\_\_\_
- 17 | Father's Day \_\_\_\_\_
- 19 | Juneteenth \_\_\_\_\_
- 21 | Summer Begins \_\_\_\_\_

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**MONTHLY PROJECT PLAN**

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
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_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

**SALES PRODUCTION RECAP**

MONTH

YTD

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
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**BUDGET RECAP**

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____



**Get involved and stay informed.**

What are the trends in the current market? What are the latest regulations that might affect your business? What are your competitors up to? The more you can keep in touch with overall conditions, the better. Trade journals, websites, blogs and local networking groups can be helpful. So can your Westamerica account representative. With clients across a wide range of industries, we'll help you stay in the know.

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15	16	17	18	19	20	21
<b>22</b>	23	24	25	26	27	28
29	30	31				

**DATES TO REMEMBER**

- 04 | Independence Day \_\_\_\_\_
- 22 | Parents' Day \_\_\_\_\_

**MONTHLY PROJECT PLAN**

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
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**SALES PRODUCTION RECAP**

**MONTH**

**YTD**

PRODUCT LINE/CATEGORY	MONTH			YTD		
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**BUDGET RECAP**

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# AUGUST 2018

Safeguard your important data.

## Manage your time and money by delegating effectively.

A single data breach can quickly undermine your relationship with your clients. So don't take chances. Use a secure mailhouse, make sure your online services are protected, and keep your entire staff up to date on security protocols. You can trust Westamerica to do our part—and then some. We zealously protect our entire facility, including the mailhouse, with surveillance cameras, military-grade encryption, malicious code protection and air-tight firewalls.



## DATES TO REMEMBER

- 05 | Friendship Day \_\_\_\_\_
- 07 | Purple Heart Day \_\_\_\_\_
- 21 | Senior Citizens Day \_\_\_\_\_
- 26 | Women's Equality Day \_\_\_\_\_

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19	20	21	22	23	24	25
26	27	28	29	30	31	

## MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
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## SALES PRODUCTION RECAP

MONTH

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PRODUCT LINE/CATEGORY	MONTH			YTD		
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## BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# SEPTEMBER 2018

Keep everyone informed.



### A little investment in time will pay off in the end.

Even a relatively small marketing project can have lots of moving parts. The key to tying them all together is consistent communication. Internal coordination can help minimize redundancies, revisions and false starts, which often add extra time and cost to a project. Westamerica gives you a real advantage with external coordination, eliminating the need for multiple vendors and keeping you firmly in control.

### DATES TO REMEMBER

- 03 | Labor Day \_\_\_\_\_
- 09 | National Grandparents Day \_\_\_\_\_
- 10 | Rosh Hashanah \_\_\_\_\_
- 11 | Patriot Day \_\_\_\_\_
- 17 | Constitution Day/Citizenship Day \_\_\_\_\_
- 19 | Yom Kippur \_\_\_\_\_
- 21 | National POW/MIA Recognition Day \_\_\_\_\_
- 23 | Autumn Begins \_\_\_\_\_

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16	<b>17</b>	18	<b>19</b>	20	<b>21</b>	22
<b>23</b>	24	25	26	27	28	29
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## MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
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## SALES PRODUCTION RECAP

PRODUCT LINE/CATEGORY	MONTH			YTD		
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## BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# OCTOBER 2018

Manage the timeline.

## Know where you're going, and when you want to get there.

When planning your timeline, we recommend starting with your launch date and working backwards. While setting your target date, define your intermediate goals. Make sure you allow enough time for each step. Your Westamerica account representative can help coordinate things with each department. If you have a tight deadline right from the start, ask about time-saving options.



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14	15	<b>16</b>	17	18	19	20
21	22	23	24	25	26	27
28	29	30	<b>31</b>			

## DATES TO REMEMBER

- 08 | Columbus Day \_\_\_\_\_
- 16 | Boss's Day \_\_\_\_\_
- 31 | Halloween \_\_\_\_\_

## MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
_____	_____	_____	_____	\$ _____
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## SALES PRODUCTION RECAP

PRODUCT LINE/CATEGORY	MONTH			YTD		
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## BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# NOVEMBER 2018

Rely on proven methods.



## Tap into the power of direct mail.

There's a reason why tried and true tools are still around. They work. Direct mail is a great example. This time-tested method is simple, powerful and cost-effective. You can deliver your message one-on-one and encourage an immediate response. With our own design, pre-press, printing, bindery and mailhouse departments under the same roof, Westamerica can take your direct mail project all the way from concept to delivery.

## DATES TO REMEMBER

- 04 | Daylight Saving Time Ends \_\_\_\_\_
- 06 | Election Day \_\_\_\_\_
- 06 | Diwali \_\_\_\_\_
- 11 | Veterans Day \_\_\_\_\_
- 12 | Veterans Day (observed) \_\_\_\_\_
- 22 | Thanksgiving Day \_\_\_\_\_
- 23 | Black Friday \_\_\_\_\_
- 26 | Cyber Monday \_\_\_\_\_

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18	19	20	21	22	23	24
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## MONTHLY PROJECT PLAN

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PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
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## SALES PRODUCTION RECAP

PRODUCT LINE/CATEGORY	MONTH			YTD		
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## BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

Analyze your results.

### Get tangible data and use it for future planning.

What worked? What didn't? What should you do differently next time? Westamerica can help you answer these questions and many more. You can use email tracking, promotional codes, a special phone number, business reply forms and other techniques to measure response rates, calculate your ROI or track exactly how consumers responded. Your account representative can then use this data to help plan future campaigns.



### DATES TO REMEMBER

- 03 | Hanukkah \_\_\_\_\_
- 07 | Pearl Harbor Remembrance Day \_\_\_\_\_
- 21 | Winter Begins \_\_\_\_\_
- 24 | Christmas Eve \_\_\_\_\_
- 25 | **Christmas Day** \_\_\_\_\_
- 26 | Kwanzaa \_\_\_\_\_
- 31 | New Year's Eve \_\_\_\_\_

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16	17	18	19	20	<b>21</b>	22
23	<b>24</b>	<b>25</b>	<b>26</b>	27	28	29
30	<b>31</b>					

### MONTHLY PROJECT PLAN

Use the Promotion Plan Worksheet to help you construct your projects – see page 7-8

PROJECT NAME	OBJECTIVE(S)	START DATE	END DATE	PROJECT BUDGET
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### SALES PRODUCTION RECAP

PRODUCT LINE/CATEGORY	MONTH			YTD		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%
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### BUDGET RECAP

MONTH	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____
YTD	PLANNED EXPENDITURES _____	ACTUAL EXPENDITURES _____	% OVER/UNDER _____

# HELPFUL INFORMATION

## GREAT WEBSITES TO ENHANCE YOUR MARKETING EFFORTS

### Westamerica Communications

[www.mywestamerica.com](http://www.mywestamerica.com)

Our site of fresh new ideas, case studies, and much more!

### Writing Resources

[www.merriam-webster.com](http://www.merriam-webster.com)

Merriam-Webster will help answer your language questions.

### Newsletter Access

[www.newsletteraccess.com](http://www.newsletteraccess.com)

Contains advertising newsletters with searchable directories of over 5,000 issues. Access up-to-date information on a wide variety of subjects.

### American Marketing Association

[www.ama.org](http://www.ama.org)

A great marketing resource for learning what's happening in the industry.

### Direct Marketing Association

[www.thedma.org](http://www.thedma.org)

DMA delivers access to tools and opportunities to improve your direct marketing skills.

### United States Postal Service

[www.usps.com](http://www.usps.com)

Learn the rules and regulations for your direct mail pieces.



design



print



mail



online



video



fulfillment



wide format



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