

COLLABORATE

CREATE

APPLAUD

REPEAT

2023

Marketing Planner

ADJUSTING TO THE NEW NORMAL



SPECIAL FORWARD TO THE 2023 MARKETING PLANNER

HOW TO PROMOTE OUR “NEW NORMAL”

Hi Friends,

About this time last year, we saw signs that we were collectively going to be returning to some normalcy. While things are definitely better, they are not back to what life was like in 2019. And may never be.

We continue to adjust to the changes from this worldwide event and do our best to manage through the ups and downs of the economy, politics and our everyday life.

IS THIS OUR NEW “NORMAL”

Many experts believe that, as with all major events, the old “normal” never returns. Instead, things change to adjust to the current situation and simply never change back. Since every business is being impacted at a unique level, the solutions and the future direction of your organization must be built upon a new and enlightened direction.

This new direction should not just be a continuation of your old plan, but rather a completely new plan that takes into account the changes that you believe will permanently alter the direction at your operation.

As you scan the horizon to look at all the implications for your business, ask yourself what situations have changed and what might provide you with a new opportunity?

Here is a list of anticipated market changes that might create opportunities for you. Note that some of these were on last year's list and still remain:

VIRTUAL MEETINGS AND CONVERSATIONS ARE HERE TO STAY BUT IN PERSON EVENTS ARE BACK!

The world was introduced to Zoom and other platforms during the pandemic. They aren't going away. While companies are trying to restore the in-person events, the jury is still out on when these would ever meet the pre-pandemic levels of participation.

However, with the flu variants diminishing, there remains a strong likelihood that conferences, trade shows and exhibits are increasing in frequency.

How might your products/services adjust within these trends? How have you changed your products/services to adapt to this new environment? Is more change required?

What does the new marketing mix look like with more virtual meetings? For one, direct mail can play a larger role in marketing as fewer in-person visits take place. Direct mail is an effective tactic to stay connected.

It's important that you actively update your customer's address and information to ensure there is no lapse in your client connections. Home addresses and/or secondary office addresses might be a bigger part of the communication mix going forward.



NEW PARTNERSHIPS MAY PROVIDE A WIN-WIN

Companies are very open to establishing partnerships in today's environment. With a constant flux of business closures, supply limitations, and changing conditions, consider lifting another business along with you to serve a new market and introduce new capabilities.

Or, simply share costs for a joint promotion to allow you to do more with less.

E-COMMERCE CONTINUES TO GROW IN IMPORTANCE

The latest information shows that E-commerce grew in 2021 by 16% and is projected to finish 2022 at about 12%. Total sales via E-commerce are just shy of \$1 Trillion now.

Virtually all categories of consumer purchases have grown during the pandemic. These behaviors are sticking and may be forever changing how we think about the retail experience.

If you are not committed to the digital channel as a means to transact sales, build rapport, and improve customer service, you must start immediately.

According to Ethan Taylor from NewGenApps.com, there are a number of key trends that are impacting E-commerce this year and beyond. How does your strategy match up to these necessities?

I consider these the top 5:

- 1) Increased Personalization** – the experience must be engineered to be relevant to the individual. Think about appropriate product recommendations and suggestions that add value.
- 2) Environmental Awareness** – are you focusing on sustainability and is your brand sensitive to these causes?
- 3) Brand Influencers** – These influencers will continue to grow in importance and will likely turn into “partners”, not just salespeople for your brand.
- 4) Omni-Channel Communication** – You'll need to be present in all the major channels with your messaging to ensure you are connecting. Think email, direct mail, digital advertising, social media and more.
- 5) Shoppable Video Ads on Social Media Sites** – Think direct “click to purchase” mini commercials delivered in a hyper local/targeted manner.

SPECIAL FORWARD TO THE 2023 MARKETING PLANNER

IS RETAIL BOUNCING BACK?

While the long-term future of the retail environment is still transforming, current trends suggest that consumers are enjoying returning to some “in person” shopping experiences. Just providing goods and services are no longer enough to maintain a successful retail business. Unique merchandising, high service levels, value added experiences all help to contribute to a positive retail experience.

FLEXIBILITY AND AGILITY RULE THE DAY

Today's consumers are dealing with the most frustrating circumstances in their memory. Think of the wartime conditions that other generations faced. These are similar times with service disruptions, product shortages and general business conditions ever-changing.

Your service and plans must be flexible to adjust to the changing demands of the day. As you contemplate marketing plans and programs keep in mind the following items:

Supply – Do you have adequate supply of what you are promoting? Can you confirm that your supply chain can meet your short and long term needs?

Competitive Conditions – How has the environment changed for pricing, selection and even new product introduction?

Buyer Mindset – This can change day by day based on conditions. Make sure you have your finger on the pulse to ensure understanding.

SURVEY YOUR CUSTOMERS REGULARLY

With so much in flux today, it's important to stay close to your customers. Maintain a healthy, ongoing dialogue with them to make sure you understand their current thinking, as it relates to your business. Behaviors and habits that were consistent before may now be permanently changed.

You need to know.

HEALTH AND WELLNESS AS A PRIORITY

The pandemic brings a greater awareness of our individual health and wellness. How will this impact your business? How about your messaging?

Does health and wellness fit within your current marketing messaging? It is a major focus for so many consumers. Acknowledging that many decisions they will make may be a reflection on how they associate their personal wellness and health with your product or service.

Make sure that you are also reflecting your company's concern about their health and safety. If there ever has been a time for sensitivity towards this area, it is now.



SINGLE SERVINGS

Everything is now available in individual portions. No more communal eating or sharing. Is there an opportunity to segment your products/service into a single-serve version?

A SHIFT TOWARDS VALUE

Likely as a result of the economic uncertainty surrounding the pandemic, and now inflation, consumers have switched their buying behaviors in search of value. According to a McKinsey study, an increasing number are being more mindful of where they spend their money. They are also changing to less expensive products to save money. And, they are researching products more diligently before making purchases.

Think of how your products and services can be presented through this new lens.

SOCIAL AWARENESS WILL CONTINUE TO BE A PRIORITY

The pandemic and corresponding social protests and gatherings have shed a light on the importance of understanding cultural issues at a deeper level. Developing the right social platform for the coming year is important.

Evaluating your core tendencies, corporate culture and outside influences will help you establish a position on those things happening within your market/trade area.

Depending on your level of and type of commitment, you may find that this now opens you up to connect with people you never did before, add or subtract products from your lines and even rethink your entire brand and imagery.

Are you taking these things into account as you plan your campaigns? Are you reflecting a multicultural perspective in your plans? Things to keep in mind as you plan a multicultural marketing initiative:

Ensure diversity and inclusion in the planning process – If you have the ability to build your planning team from those that reflect the target audience you'll likely come up with a more effective plan.

Make sure your creative/approach is relevant to the product/message – Care should be taken as to how you frame your messaging and offering. Adding a multicultural element that is off target can be deemed as offensive or gratuitous.

Match your multicultural opportunities with your marketing budget – today many marketers are not allocating enough of their budget to this issue and that results in low impressions and potentially negative pushback. If you strive to balance your spend appropriately, you'll always know that you have done your best to give this part of your marketing plan a chance to succeed.

SPECIAL FORWARD TO THE 2023 MARKETING PLANNER

IS IT TIME TO RETHINK YOUR MARKETING PARTNERS?

With supply chains still facing trouble in some industries and many firms struggling to keep adequate staffing and other basic commitments such as keeping core supplies in stock, taking a fresh look at those you have depended on in the past may lead you to explore new companies that are better prepared to deal with the new changes in.

If you are ready to explore, consider Westamerica. We continue to grow and expand.

All the best for a successful 2023!

Sincerely,

Your Friends at Westamerica

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 Complete 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 obtain 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 and avoid any pitfalls.
- 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* 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, social media, 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. Those that account for 75%-80% 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

Use mystery shoppers, or user feedback mechanisms (surveys or net promoter scores) to determine, 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 promotion.)

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
- Attract new clients or bring back former clients
- Build loyalty by rewarding current clients
- Increase transaction counts
- Take advantage of seasons or special events
- Overcome seasonality of business
- Increase transactions during certain days or times during the day
- 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 \$ _____
- ☐ City and/or Zip Code(s) or Census Tract _____
- ☐ Age Range _____ ☐ 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
- ☐ Script Needed

- ☐ Corporate Call Center Estimated Number of Calls _____
- ☐ 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 - Confirm unique supply requirements and other circumstances. Do not take anything for granted.

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
_____	_____	_____	= _____	_____	= _____
_____	_____	_____	= _____	_____	= _____
_____	_____	_____	= _____	_____	= _____
NORMAL VOLUME		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)		
MARKETING COSTS		ESTIMATED		ACTUAL	
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.)		_____		_____	
TOTAL MARKETING COSTS		\$ _____	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
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				

FEBRUARY						
S	M	T	W	T	F	S
			1	2	3	4
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

MARCH						
S	M	T	W	T	F	S
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19	20	21	22	23	24	25
26	27	28	29	30	31	

APRIL						
S	M	T	W	T	F	S
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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						

MAY						
S	M	T	W	T	F	S
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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			

JUNE						
S	M	T	W	T	F	S
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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

year at a GLANCE 2023

JULY						
S	M	T	W	T	F	S
						1
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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

AUGUST						
S	M	T	W	T	F	S
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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		

SEPTEMBER						
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

OCTOBER						
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				

NOVEMBER						
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		

DECEMBER						
S	M	T	W	T	F	S
					1	2
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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JANUARY 2023

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.

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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 _____
- 16 | Martin Luther King, Jr. Day _____
- 20 | National Cheese Lovers Day _____
- 22 | Lunar New Year _____
- 24 | National Peanut Butter 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

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 2023

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
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5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

DATES TO REMEMBER

- 01 | National Freedom Day _____
- 12 | Lincoln's Birthday _____
- 14 | Valentine's Day _____
- 20 | Presidents' Day _____
- 22 | Ash Wednesday _____

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

MARCH 2023

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

- 03 | Employee Appreciation Day _____
- 12 | Daylight Saving Time Starts _____
- 17 | St. Patrick's Day _____
- 20 | First Day Of Spring _____
- 29 | National Vietnam War Veterans Day _____

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12	13	14	15	16	17	18
19	20	21	22	23	24	25
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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

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 | April Fool's Day _____
- 02 | Palm Sunday _____
- 06 | Passover Starts _____
- 09 | Easter Sunday _____
- 13 | Passover Ends _____
- 18 | Tax Day _____
- 22 | Earth Day _____
- 27 | Take Our Daughters And Sons To Work Day _____

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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
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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

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 2023

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

- 05 | Cinco de Mayo _____
- 06 | National Nurses Day _____
- 14 | Mother's Day _____
- 20 | Armed Forces Day _____
- 29 | Memorial Day _____

S	M	T	W	T	F	S
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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			

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

- 06 | D-Day _____
- 14 | Flag Day _____
- 18 | Father's Day _____
- 19 | Juneteenth _____
- 21 | Summer Solstice _____

S	M	T	W	T	F	S
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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	

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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_____	_____	_____	_____	\$ _____
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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
_____	_____	_____	_____



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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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

04 | Independence Day _____
 23 | 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
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____

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
_____	_____	_____	_____

AUGUST 2023

Safeguard your important data.

Maintain the tightest possible security of your customer's information.

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

04 | National Chocolate Chip Cookie Day _____
 13 | Left-Handers Day _____
 26 | National Dog Day _____
 30 | National Beach Day _____

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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		

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		
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_____	_____	_____	_____	_____	_____	_____

BUDGET RECAP

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

SEPTEMBER 2023

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.

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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

DATES TO REMEMBER

04 | Labor Day _____
 10 | National Grandparents Day _____
 22 | September Equinox _____

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	PLAN	ACTUAL	%	PLAN	ACTUAL	%
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_____	_____	_____	_____	_____	_____	_____

BUDGET RECAP

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

OCTOBER 2023

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.



DATES TO REMEMBER

01 | International Coffee Day _____
 06 | World Smile Day _____
 09 | **Columbus Day** / Indigenous People's Day _____
 27 | National American Beer Day _____
 31 | Halloween _____

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				

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
_____	_____	_____	_____

NOVEMBER 2023

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

05 | Daylight Saving Time Ends _____
 11 | Veterans Day _____
 23 | Thanksgiving Day _____
 24 | Black Friday _____
 27 | Cyber Monday _____

S	M	T	W	T	F	S
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
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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 _____

DECEMBER 2023

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

- 07 | Pearl Harbor Remembrance Day _____
- 08 | First Day Of Hanukkah _____
- 15 | Last Day Of Hanukkah _____
- 21 | Winter Solstice _____
- 24 | Christmas Eve _____
- 25 | Christmas Day _____
- 26 | Kwanzaa _____

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17	18	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

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

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

American Marketing Association

www.ama.org

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

United States Postal Service

www.usps.com

Learn the rules and regulations for your direct mail materials.

Writing Resources

www.merriam-webster.com

Merriam-Webster will help answer your language questions.

Seth Godin – sethgodin.com

Author and innovation guru shares thoughts on business.

Nathan Barry – nathanbarry.com

Founder of Convertkit. He regularly posts about design and marketing.

Beard Boy Productions – beardboy.com

Check out the wide range of videos. Great for inspirations.

Mashable – mashable.com

A good general site to catch up on all things.

Mixergy – mixergy.com

Great podcast where you can learn from a large range of experienced mentors and entrepreneurs through interviews and sessions.

Copy Tips – copyblogger.com

Each week, Copyblogger answers your questions about copywriting, content marketing, email marketing, conversion optimization, mindset and much more.

CreativeLive – creativelive.com

An online learning platform that broadcasts live classes.



design



print



wide format



mail



online



video



fulfillment



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