



# 2024 MARKETING PLANNER

*Tools to help you brainstorm and  
organize your efforts for 2024*

FROM YOUR FRIENDS AT WESTAMERICA  
[MyWestamerica.com](https://MyWestamerica.com)



**Hello friend,**

The new year is just around the corner and brings with it challenges and opportunities for us all. Will 2024 be a status quo repeat of the previous year, or are we about to embark on a rapid race through new business and marketing applications via AI and its offspring?

**Look Inside Before You Look Outside** - Now is a good time to look inside your operation and assess capacity. Are you adequately staffed, trained, and funded for the challenges ahead? (See page 2)

**Scan the Environment to Find Opportunities** - Every year, it's a good idea to explore the landscape and identify the tools and tactics being used by your industry and others. (See page 3)

## FOUR TRENDS FOR 2024

**Some key external trends are projected to impact marketers in 2024. How can you capitalize on these trends?**

### 1. Growth of Artificial Intelligence

AI will play a role in everything from graphics creation to advertising choices, personalization, and customer service. The list is too long to outline here. Make sure you have a strategy for harnessing AI's power, even if it's something simple to start. It's imperative to get on the path and grow with the movement.

### 2. Resurgence of Direct Mail

Direct mail marketing suffered previously at the hands of email and other digital media. However, it's growing again. Research shows that Millennials and Gen Z (a generation with little mail in their childhood) see direct mail as a valid tool for reaching them with offers. [View direct mail infographic](#)

### 3. Out-of-Home Marketing

Post-pandemic behavior is showing a solid return to out-of-home activities, including sampling events, pop-ups, and other outreach. Consumers will see your brand and event marketing messaging in everyday social activities. Tools to help you leverage this include outdoor signage, event flags, car and bus wraps, and other tools to influence an impulse decision.

### 4. Tradeshows and Events are Back

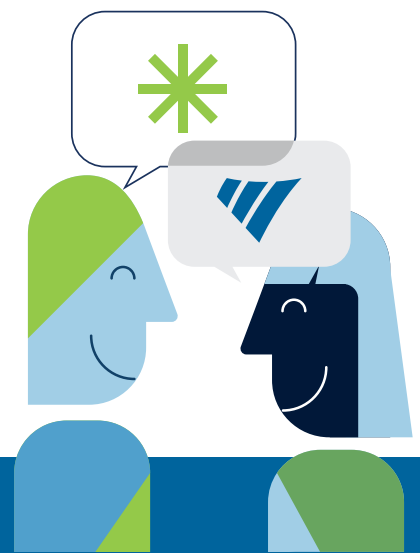
Traffic at trade show attendance has eclipsed previous pandemic levels. With traffic up, your product can receive greater visibility and consideration than in previous years. Now might be the time to update your booth and signage technology to give your brand the best chance to shine in front of hungry buyers.

How will some of these trends affect your planned tactics and strategies? Take time to do your Marketing Audit and Environmental Scan so you can begin to identify the core areas of your focus for the coming year.

**All the best for a successful 2024!**

**Your friends at Westamerica.**

*We love to collaborate and  
help our clients grow.*





## MARKETING AUDIT

**Many companies will conduct an annual “Marketing Audit” to provide perspective on the current marketing effectiveness. Here are sample questions for a typical marketing audit:**

1. Does the marketing plan match up with the overall goals of the business? If so, how? If not, why not?

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2. Do you have the support and training to embrace both new and old technologies?

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3. Do the individual tactics or campaigns support the overall marketing plan? If so, how? If not, why not?

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4. What are we measuring and why?

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5. Do we have the right people in place? If not, how do we address the holes?

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6. What is our plan for consistent improvement over time?

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At the completion of your audit, you should have an awareness and appreciation for your strengths and weaknesses as a department. Strive to adjust those areas to better align your team for the coming year.

Source Right Source Group:

<https://www.rightsourcemarketing.com/marketing-strategy/conducting-a-marketing-audit-the-5-essential-questions/>



## ENVIRONMENTAL SCAN

Every year it's a good idea to explore the landscape and identify the tools and tactics being used by your industry and others. Some good questions to ask as you explore new options:

What tools are achieving the highest ROI in my industry?

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What technologies are evolving to play a more important role in our marketing future?

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What tactics and tools that have been effective in the past are no longer working?

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What are the short/long implications for our industry, and how will/should our marketing be adjusted?

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Is there another industry doing interesting things to reach our same demographic?

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What Micro and Macroeconomic influences are going to affect our business success?

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## GROUP ACTIVITY - STOP > START > CONTINUE >

Give participants 5-10 minutes to write ideas on colored post-it notes. While brainstorming, keep ideas private to avoid groupthink. Have participants add ideas to the relevant columns of Start, Stop, and Continue.

**Start** - Ask participants to list things that they think will positively impact marketing in 2024.

**Stop** - List things that aren't helping the team achieve business goals.

**Continue** - List things that have already worked well or should stay in the campaign or workflow.

Grouping similar ideas together will help identify themes for further discussion and planning. A facilitator may ask participants to add a dot to important ideas; this will help the group vote on priorities. Finally, agree on action steps before the meeting ends (who does what and when).





## TIME TO BUILD YOUR MARKETING PLAN

Now that you have some perspective from your Marketing Audit and Environmental Scan, you can begin to identify the core areas of focus for the coming year.

Take your overall objectives and budgets and break them into monthly activities. You can use the marketing calendar and monthly worksheets (pages 9 - 20) to help you track your success.

You'll also notice that the Marketing Planner has other helpful worksheets including a Promotional Plan Worksheet and a Return-on-Investment Worksheet.

These tools should help you get the most out of your 2024 initiatives.

## HOW TO USE THIS WORKBOOK



- Determine your planned sales objectives as identified by your senior management team.
- Use the *Monthly Project Plan* to identify your focus projects for each month. (pgs. 9-20)
- Use the *Promotion Plan Worksheet* to help you construct your promotion. (pgs. 5–6)
- Track and evaluate your promotional activity using the *Return on Marketing Investment Worksheet*. (pg. 7)
- Update your sales results and budgets on a monthly basis using the *Budget Recap Sections* each month.

# PROMOTION PLAN WORKSHEET

**Promotions are designed to accomplish specific objectives in a limited or set period of time. They traditionally offer a special value and provide a tactical way of building immediate sales.**

**Timetables:** Each promotion is different, but always start with the end in mind, and know that it's wise to allow more time than you think for planning and execution. Major promotions should be introduced no more than four times annually and last four to six weeks.

**Involvement:** Engaged employees are essential to any successful promotion and will sell a promotion if they are well informed. Be sure to include internal communications tactics as part of your plan.

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

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

- ☐ Competitive pricing rates \_\_\_\_\_
- ☐ Low fee/no service charge \_\_\_\_\_
- ☐ Speed of service processing \_\_\_\_\_
- ☐ Unique product or service feature \_\_\_\_\_
- ☐ Event \_\_\_\_\_
- ☐ Other \_\_\_\_\_

# PROMOTION PLAN WORKSHEET

## 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 _____				_____	_____

### 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

<input type="checkbox"/> Web Banner Ads	<input type="checkbox"/> Email	<input type="checkbox"/> Television
<input type="checkbox"/> Radio	<input type="checkbox"/> Infographic	<input type="checkbox"/> Social Media
	<input type="checkbox"/> PURLs	<input type="checkbox"/> 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.

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

## RETURN ON MARKETING INVESTMENT

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

GOAL		ESTIMATED		ACTUAL PRODUCTION	
FEATURED PRODUCT(S)	PROFITABILITY FACTOR*	SALES	PROFIT (DOLLARS)	SALES	PROFIT
			=		=
			=		=
			=		=
		Est. Total _____	A	Actual Total _____	
FEATURED PRODUCT(S)	PROFITABILITY FACTOR*	SALES	PROFIT (DOLLARS)	LESS PROFIT FROM "NORMAL VOLUME"	
			=		
			=		
			=		
		Normal Profit _____	B	Actual Incremental Profit _____	
		Actual Incremental Profit from Promotion _____	C (A-B)	from Promotion _____ (A-B)	
		<b>ESTIMATED</b>		<b>ACTUAL</b>	
		\$ _____		\$ _____	
		_____		_____	
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		_____		_____	
		_____		_____	
		_____		_____	
		\$ _____	D	\$ _____	
		Estimated		Actual	
		ROI _____	(C ÷ D)	ROI _____	(C ÷ D)

MARKETING COSTS

- 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

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

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**How to use the Return on Marketing Investment Sheet:**

Determine your planned sales volume of the product(s) featured during the promotional period. Enter the profitability factor for each product and multiply it by the planned sales volume to determine your estimated profit from your promotion. Subtract the amount of profit from everyday sales activity on these products (without promotion) to arrive at your anticipated incremental profit.

Identify and total your anticipated marketing costs. Next, divide your planned incremental profit (C) by your anticipated marketing (D) costs. This ROI will indicate how much profit you will generate for each dollar of marketing expense.

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



JANUARY						
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FEBRUARY						
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MARCH						
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APRIL						
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MAY						
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JUNE						
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# year at a GLANCE 2024

JULY						
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AUGUST						
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SEPTEMBER						
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OCTOBER						
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NOVEMBER						
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DECEMBER						
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# JANUARY 2024

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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## DATES TO REMEMBER

01 | New Year's Day \_\_\_\_\_  
 15 | Martin Luther King, Jr. Day \_\_\_\_\_  
 20 | National Cheese Lovers Day \_\_\_\_\_  
 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 2024

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.



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## DATES TO REMEMBER

- 01 | National Freedom Day \_\_\_\_\_
- 12 | Lincoln's Birthday \_\_\_\_\_
- 14 | Valentine's Day \_\_\_\_\_
- 14 | Ash Wednesday \_\_\_\_\_
- 19 | Presidents' Day \_\_\_\_\_

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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 2024

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

- 01 | Employee Appreciation Day \_\_\_\_\_
- 10 | Daylight Saving Time Starts \_\_\_\_\_
- 17 | St. Patrick's Day \_\_\_\_\_
- 19 | First Day Of Spring \_\_\_\_\_
- 24 | Palm Sunday \_\_\_\_\_
- 29 | National Vietnam War Veterans Day \_\_\_\_\_
- 31 | Easter Sunday \_\_\_\_\_

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	PLAN	ACTUAL	%	PLAN	ACTUAL	%

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 \_\_\_\_\_
- 15 | Tax Day \_\_\_\_\_
- 22 | Earth Day \_\_\_\_\_
- 23 | Passover Starts \_\_\_\_\_
- 25 | Take Our Daughters And Sons To Work Day \_\_\_\_\_
- 30 | Passover Ends \_\_\_\_\_

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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		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%

BUDGET RECAP

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





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
- 12 | Mother’s Day
- 18 | Armed Forces Day
- 27 | Memorial Day

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12	13	14	15	16	17	18
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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	PLAN	ACTUAL	%	PLAN	ACTUAL

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 \_\_\_\_\_
- 16 | Father's Day \_\_\_\_\_
- 19 | Juneteenth \_\_\_\_\_
- 20 | Summer Solstice \_\_\_\_\_

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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		
	PLAN	ACTUAL	%	PLAN	ACTUAL	%

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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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 \_\_\_\_\_  
28 | Parents' Day \_\_\_\_\_

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		
	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 2024

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 \_\_\_\_\_

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	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	%
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

## BUDGET RECAP

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



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.

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					

DATES TO REMEMBER

- 02 | Labor Day
- 08 | 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
				\$
				\$
				\$
				\$

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



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 \_\_\_\_\_
- 14 | Columbus Day / Indigenous People’s Day \_\_\_\_\_
- 31 | Halloween \_\_\_\_\_



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		

MONTHLY PROJECT PLAN

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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

# NOVEMBER 2024

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.

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

### DATES TO REMEMBER

- 03 | Daylight Saving Time Ends \_\_\_\_\_
- 05 | Election Day \_\_\_\_\_
- 11 | Veterans Day \_\_\_\_\_
- 28 | Thanksgiving Day \_\_\_\_\_
- 29 | Black Friday \_\_\_\_\_

### 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 _____

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

- 02 | Cyber Monday \_\_\_\_\_
- 07 | Pearl Harbor Remembrance Day \_\_\_\_\_
- 21 | Winter Solstice \_\_\_\_\_
- 24 | Christmas Eve \_\_\_\_\_
- 25 | Christmas Day \_\_\_\_\_
- 26 | First Day Of Hanukkah \_\_\_\_\_
- 26 | Kwanzaa \_\_\_\_\_

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
				\$
				\$
				\$
				\$

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

## GREAT WEBSITES TO ENHANCE YOUR MARKETING EFFORTS

### **Seth Godin – [sethgodin.com](http://sethgodin.com)**

Author and innovation guru shares thoughts on business.

### **Nathan Barry – [nathanbarry.com](http://nathanbarry.com)**

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

### **Beard Boy Productions – [beardboy.com](http://beardboy.com)**

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

### **Mashable – [mashable.com](http://mashable.com)**

A good general site to catch up on all things.

### **Mixergy – [mixergy.com](http://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](http://copyblogger.com)**

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

### **CreativeLive – [creativelive.com](http://creativelive.com)**

An online learning platform that broadcasts live classes.

## WESTAMERICA OFFERS EVERYTHING YOU NEED UNDER TWO ROOFS



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wide format



mail



online



fulfillment



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