

MARKETING PLANNER





MARKETING PLANNER

A User Guide

Plan, budget, and measure your marketing activities and analyze how to optimize them for better results. If you are a marketer who's looking to measure the performance of your campaigns and optimize your marketing activities, you can do it by building a marketing plan.

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Getting started with Marketing Planner

Here's how to build a marketing plan:

1. Begin by choosing an appropriate purpose for your plan. You can choose from one of the following purposes:

Traffic generation

Passive conversion

Active conversion

2. Create objectives to fulfill the selected purpose. For example, increase 1000 visitors in the next quarter.

3. Set an attainable target against each objective to complete your objectives. You can also specify the return you expect out of every visit to calculate the ROI of your plan.

4. Allocate budget for your campaigning through multiple channels like bulk email newsletters, social media promotions, print media, and television ads.

5. Measure and analyse the effectiveness of your marketing campaign by knowing the ROI and accessing the detailed report of your marketing plan.

Before we go on to know how to create a marketing plan, here's a list of terminologies and the explanation to help you get familiar with marketing planner.

Time span - The timeline of the marketing plan you create. You can select the start time and end time for your plan here.

Objectives - The things you do to fulfill the purpose of your marketing plan could be called objectives. For example, if the purpose is to get more visitors to consume your downloadable content like an ebook, driving more visitors would be your objective.

Targets - The attainable or doable limit you set against each objective is Targets. For example, the number of leads you expect to sign up is the Target. Targets consist of Target type and Expected number of visits. You are to choose a way (Target type) in which target has to be set and specify the expected number of visits.

Target type - There are two ways to set target :

1) Planner goals When to choose Planner goals?

When you haven't created goals in Web Assistant, you can choose Planner goals. Please read the following example to know more.

If your objective requires the visitors to visit multiple pages at a time, you can choose Planner goals as the target type. You can select the URLs of those pages that are to be visited by the visitors. The URLs have to be manually added in Web Assistant for it to show up here in Marketing Planner.

2) Web Assistant goals When to choose Web Assistant goals?

When you have created goals in the Web Assistant that helps you achieve your objectives. To learn more about goals and how to create them in Web Assistant, [click here](#).

Expected number of visits - The number of visits you expect for your objective to be complete. You can also include the expected returns per visit. For example, A target of \$1000 from 100 visits - \$10 per visit

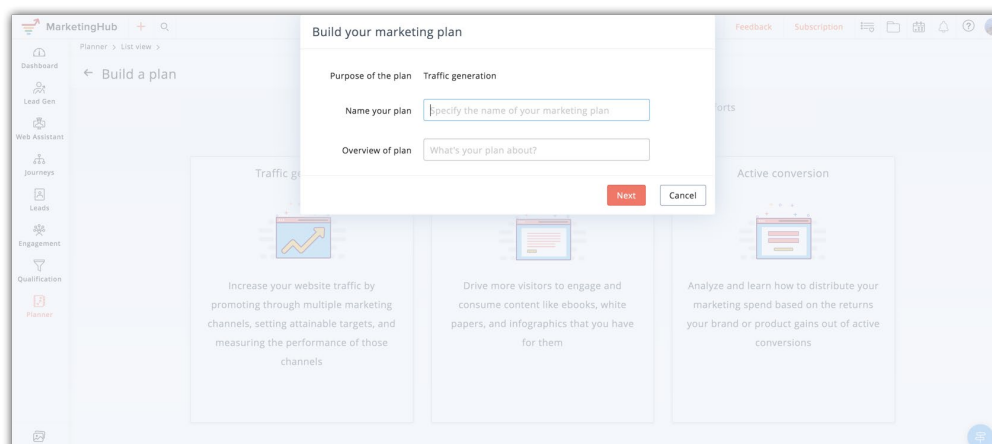
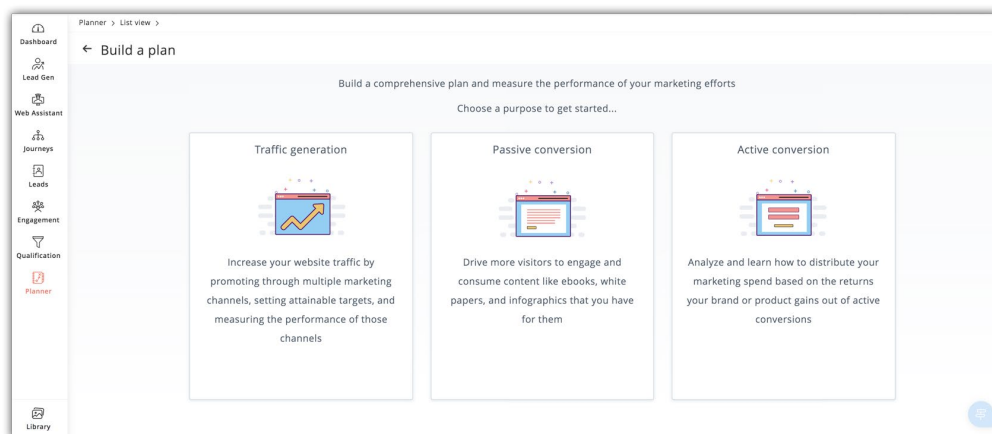
Marketing Channel - In order to achieve your marketing objectives, you are required to campaign to the intended audience through different marketing channels. You can campaign using different channels like email newsletters, social media, print media, and Television ads.

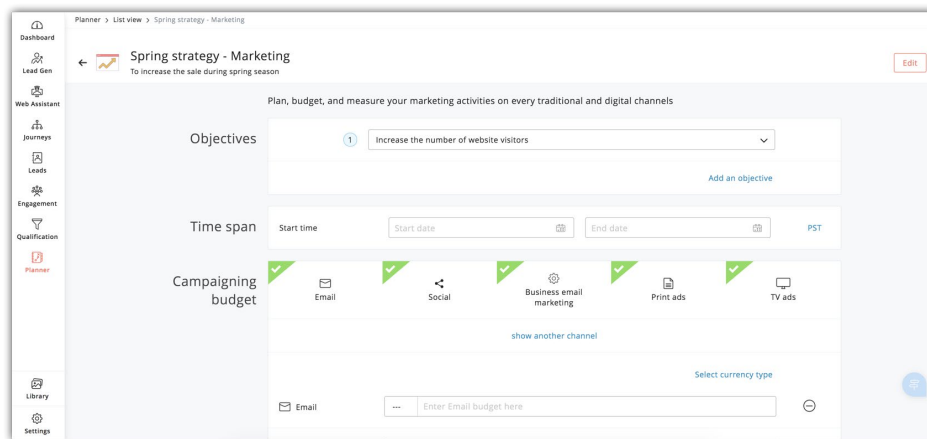
Campaigning Budget - You can specify the estimated budget of your marketing plan in the currency of your choice.

Creating a marketing plan

Creating a marketing plan

- 1) From the Navigation Toolbar, click Planner and choose Marketing Planner.
- 2) Click Build Marketing Plan to create a new marketing plan.
- 3) Select an appropriate purpose from the listed purposes.
- 4) Specify the name of the plan and overview and click Next.
- 5) Specify the objectives, time span, choose the marketing channels, and allocate the budget.
- 6) Click Save and Proceed to continue.





Your plan gets complete after you configure the marketing channels and set targets against the created objectives.

Configuring marketing channels

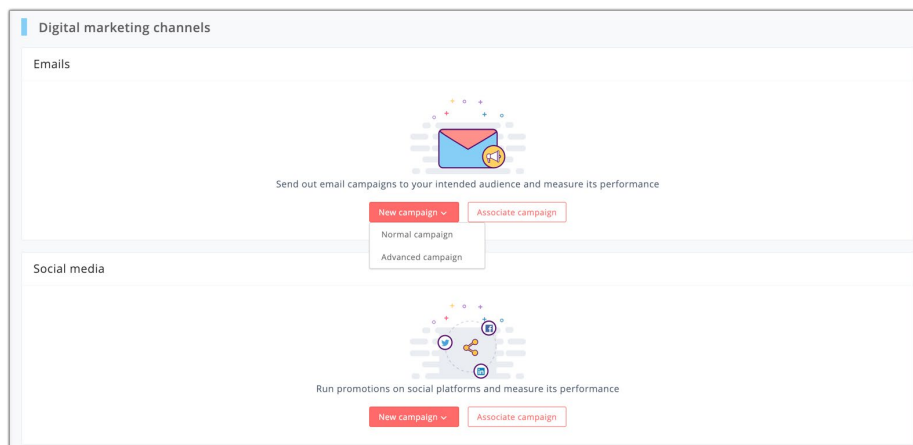
You can use multiple marketing channels like emails, social media, print media, and television to promote your campaign and measure its performance

After you add the basic plan information, create objectives, and select the marketing channels to be configured, go through the following steps to configure your marketing channels, read through to learn how to configure them for different marketing channels.

Emails

- 1) In Digital marketing channels, under Emails, Click New campaign or Associate campaign.
- 2) If you click New campaign, you can either choose Normal campaign or Advanced campaigns from the drop down menu to create a new email campaign.
- 3) If you click Associate Campaign, you will see a pop-up in which you can search for the campaigns you like to associate.

To learn more about how to create an email campaign, [click here](#).



Note: Make sure the campaign start and end time corresponds with the start and end time of your marketing plan.

Social media

- 1) In Digital marketing channels, under Social media, Click New campaign or Associate campaign.
- 2) If you click New campaign, you can either choose Page campaign or Post campaign from the drop down menu to create a new social campaign.
- 3) If you click Associate Campaign, you will see a pop-up in which you can search for the social campaigns you like to associate.

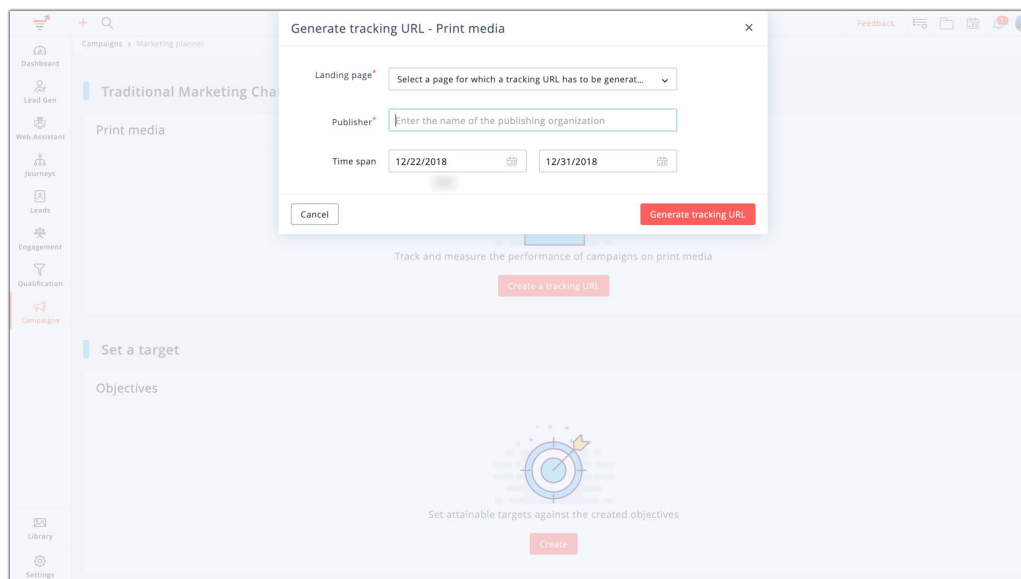
To learn more about how to create a social campaign, [click here](#).

Print media

- 1) In Traditional marketing channels, under Print media, click Generate tracking URL.
- 2) In the pop up that follows, select a landing page to be converted as a tracking URL.

- 3) Specify the name of the publisher.
- 4) Specify the time span of the print campaign.
- 5) Click Generate tracking URL.
- 6) Use the generated URL and QR code in your print campaign to measure its performance.

You can also add the print campaign preview link for your reference.



Television

- 1) In Traditional marketing channels, under Television, click Generate tracking URL.
- 2) In the pop up that follows, select a landing page to be converted as a tracking URL.
- 3) Specify the name of the broadcasting organization.
- 4) Specify the time span of the Television campaign.
- 5) Click Generate tracking URL.

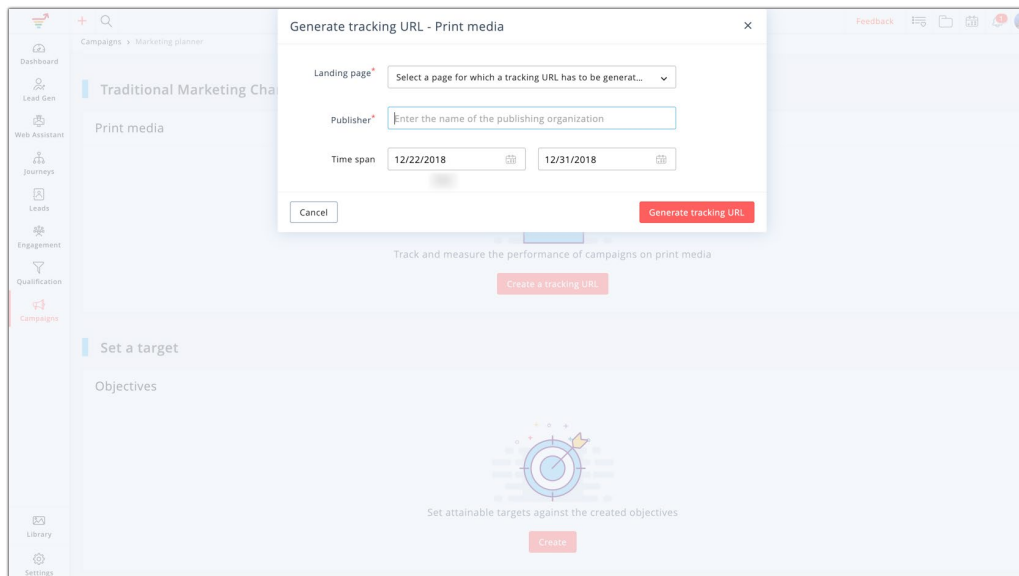
6) Use the generated URL and QR code in your television campaign to measure its performance

You can also add the television campaign preview link for your reference.

Business Email Marketing

Using Business email marketing, you can create email signature for your users. When you create signatures and share it with your users, the users are required to copy and paste the signature in the email client service to get the signature appended to their emails. You can add campaigns in the form of a card to the signatures you share with your users. Whenever email communication happens, the campaigns you run with the signatures might catch the eyes of the recipients who receive the email from your users.

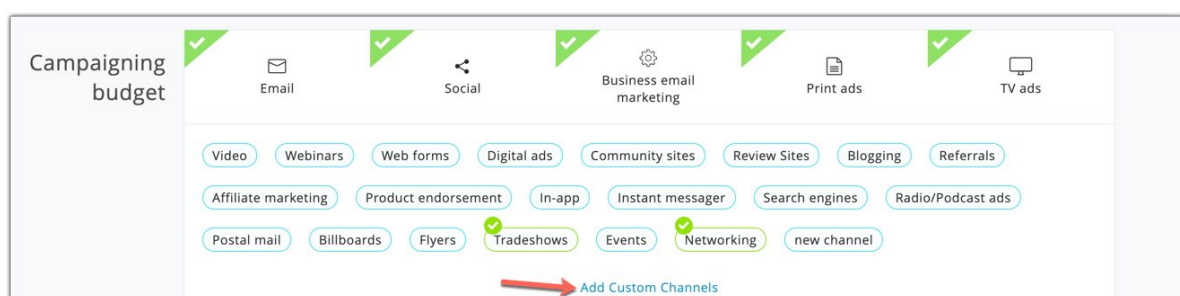
- 1) In Digital marketing channels, under Business email marketing, click New campaign.
- 2) In the pop up that follows, select a landing page to be converted as a tracking URL.
- 3) Specify the campaign name in the Source text box.
- 4) Specify the time span of the Business email marketing campaign.
- 5) Click Generate tracking URL.
- 6) Use the generated URL and QR code in your print campaign to measure its performance.
- 7) Click Edit in the Email signature section.
- 8) Click Your card to upload your campaign card or choose from the pre-designed campaign cards.
- 9) Select the users found in the Users section and click Share to share the signature with your users.



Custom Channels

You can add Custom channels by either selecting default custom channels (For e.g., Networking, Blogging) or create your own by clicking Add Custom Channels while configuring the objectives and channels.

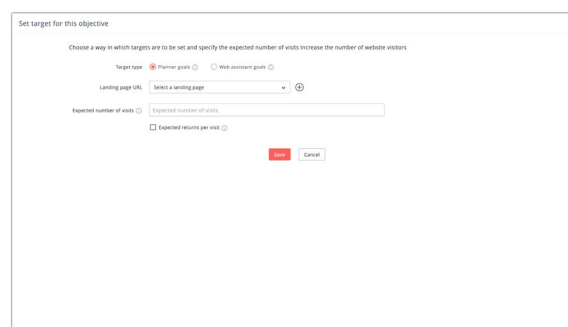
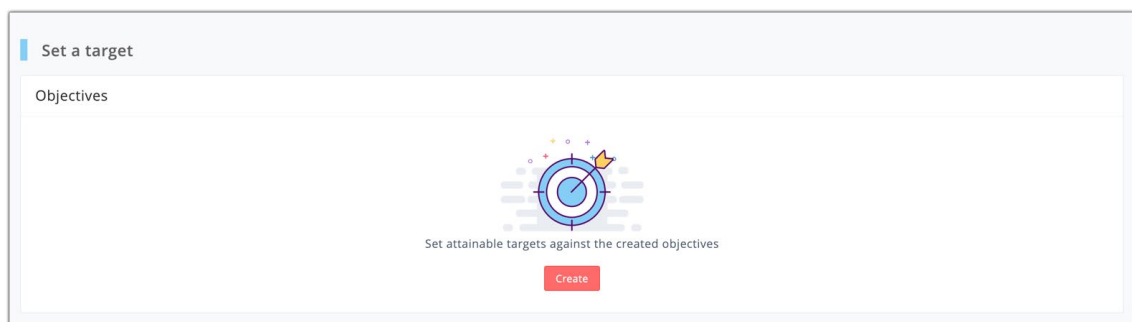
- 1) In the Custom Channel section you created, click Generate a tracking URL.
- 2) In the pop up that follows, select a landing page to be converted as a tracking URL.
- 3) Specify the campaign name in the Source text box.
- 4) Specify the time span of the custom campaign.
- 5) Click Generate tracking URL.
- 6) Use the generated URL and QR code in your print campaign to measure its performance.



Setting targets against the objectives

After configuring the marketing channels, you can set targets for the objectives you created.

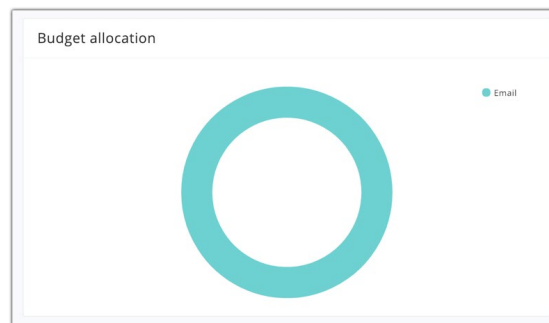
- 1) Under Set targets, click Choose objective and select an objective from the drop down menu.
- 2) Choose a target type to determine how to measure the target.
- 3) Select the expected number of visits.
- 4) Enable expected returns per visit to measure the revenue that comes from a visit.
- 5) Click Save to finish setting a target.



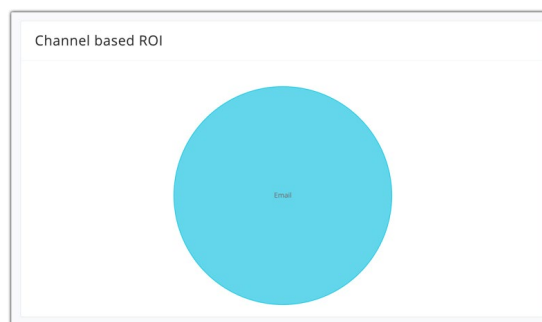
Note: Using Marketing plans requires you to have your website configured in Web Assistant to track unique conversions. The maximum time span of a plan is 90 days from the start date.

View marketing planner reports

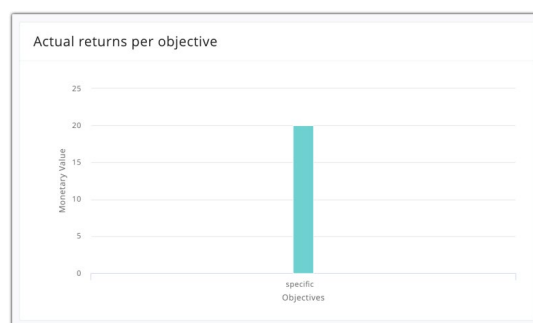
Budget allocation - This report represents how you've spent money across different marketing channels such as Emails, Social, Paper ads, TV, etc.



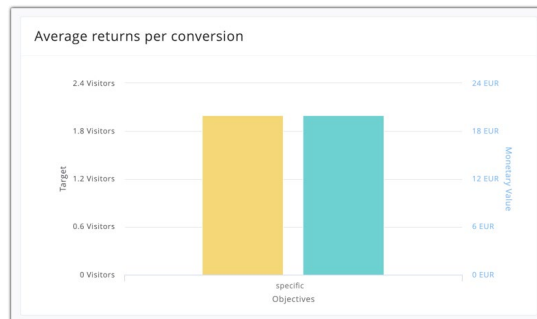
Channel based ROI - This report represents the ROI of each marketing channel.



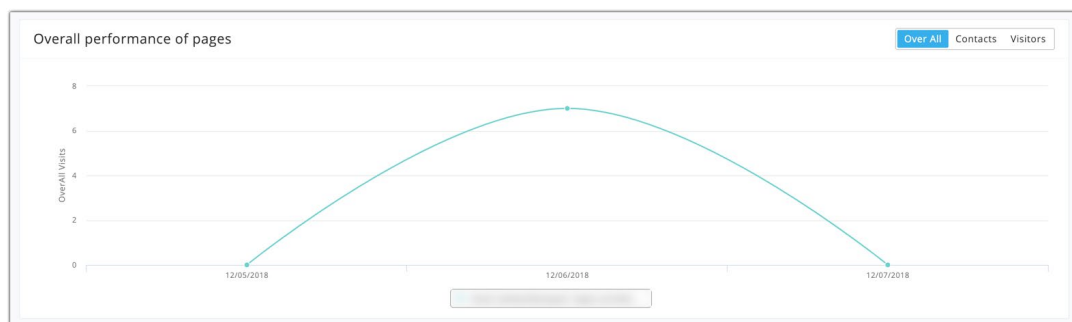
Actual returns per objective - If you have created multiple objectives, you can find the return gained from each objective.



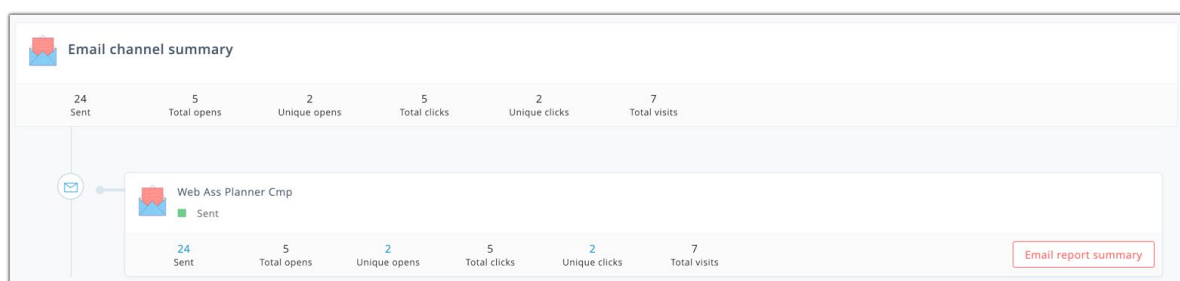
Average returns per conversion - This report shows the comparison between the number of visits and the returns gained from those visits.



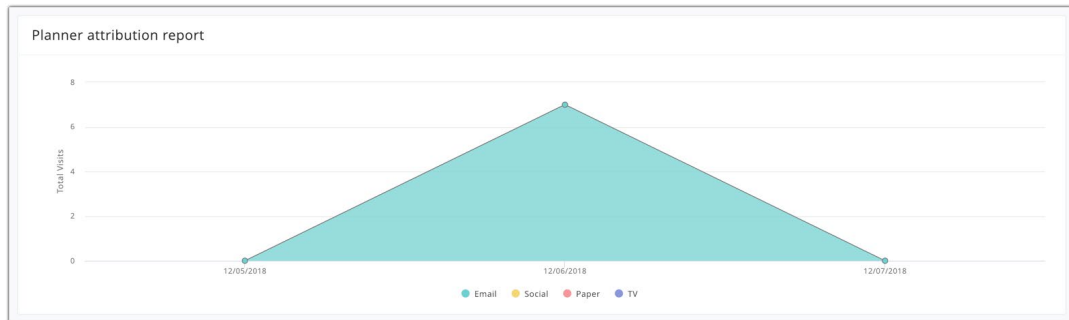
Overall performance of pages - This report shows how the landing pages perform over time. You can also view the number of leads and anonymous visitors for all the landing pages involved in your marketing campaign.



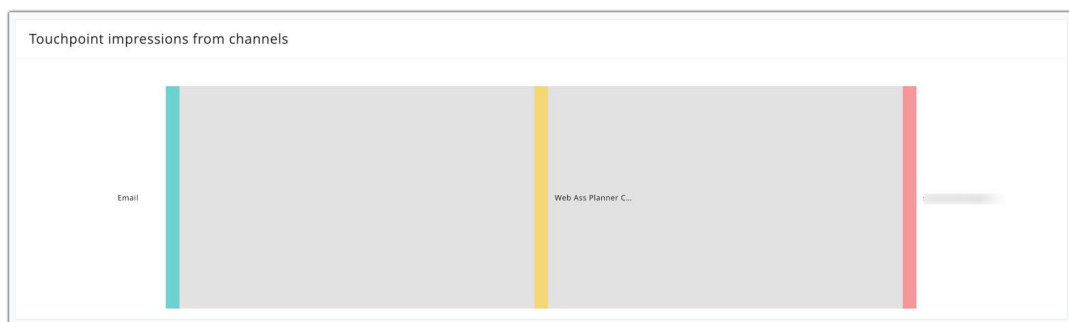
Email campaign summary - The email campaign summary shows the number of opens, clicks, and visits generated from the campaign. This report is present only when an email campaign is used as a marketing channel.



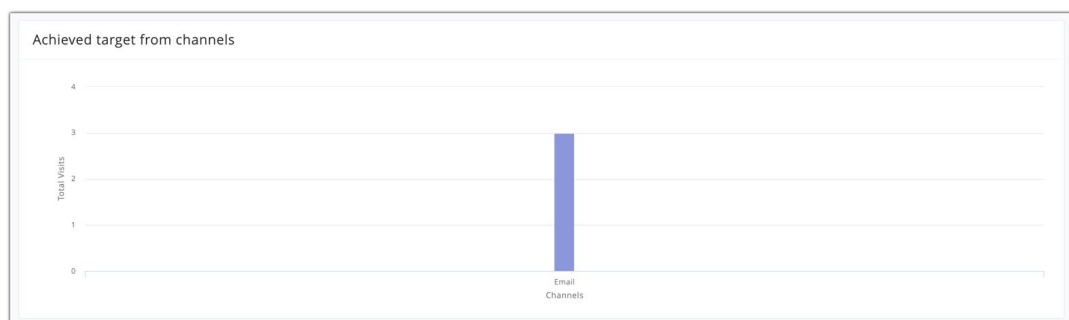
Planner attribution report - Planner attribution shows the number of visits achieved from different marketing channels over time such as Email, Social, Paper ads, TV, etc.



Impressions from channels - This chart shows the contribution of particular landing pages to every other marketing channel of your plan.



Achieved target from channels - This report represents the number of achieved targets (Number of visits or revenue gained) from the marketing channels.



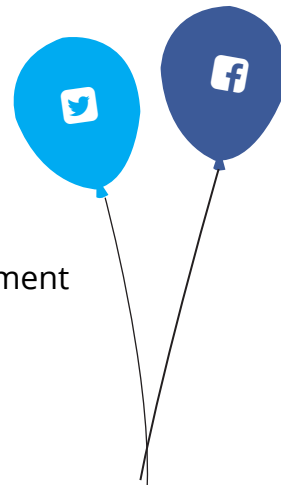
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