

#legaltech copywriter's Marcom Planning & Budgeting Guide

If you're planning a new or updated marketing communications (or "marcom") piece, this guide will help you do some structured thinking about both the message and the medium so you can get the best possible results from your creative team. (Note: [terms underlined in blue](#) in this form are hyperlinked to informative articles I've written – feel free to click and read!)

ABOUT YOUR PROJECT

What kind of marketing or other communications project(s) are you planning?

- | | |
|---|---|
| <input type="checkbox"/> Brochure (trifold or multi-page) | <input type="checkbox"/> Flyer |
| <input type="checkbox"/> Sales letter (up to 2 pages) | <input type="checkbox"/> Sales letter (longer than 2 pages) |
| <input type="checkbox"/> Article (for trade journals, etc.) | <input type="checkbox"/> White paper or special report |
| <input type="checkbox"/> Promotional postcard | <input type="checkbox"/> Slipsheets |
| <input type="checkbox"/> Case study | <input type="checkbox"/> Display ad |
| <input type="checkbox"/> Press release/media kit | <input type="checkbox"/> Advertorial |
| <input type="checkbox"/> Website (direct response) | <input type="checkbox"/> Website (general marketing) |
| <input type="checkbox"/> Newsletter or ezine | <input type="checkbox"/> Promotional email |

Other: _____

Who is your intended audience (may or may not be the same as your [target market](#))? Describe them – demographically and psychographically – as specifically as you can.

What are your primary and secondary objectives for this project?

Rank

_____ Demonstrate thought leadership

_____ Generate new sales leads

_____ Meet legal requirement

_____ Increase attendance at upcoming event

_____ Other: _____

Rank

_____ Introduce new product or service

_____ Generate repeat, cross-sell or up-sell business from existing customers

_____ Train/educate/motivate sales force

_____ Raise general market awareness or upgrade company image

YOUR MARKETING POSITION

What is your [Unique Selling Proposition](#) (USP)? How do you differentiate yourself from your competition now?

Who are your competitors? Who would you most likely be up against in a bidding situation? Who else would your ideal prospects consider for your product/service? Name at least five competitors and give website addresses or gather marketing materials if available.

Has your company produced a similar piece before? If so, what response rate did you achieve (number of inquiries or sales per 100 pieces distributed)?

What is the single most important message your audience should receive from this piece? Once they put it down, what *one* thing should they remember?

What *doesn't* need to be said? What assumptions should the creative team be aware of that will be obvious to your audience? What controversies or other subjects do we need to steer clear of?

YOUR PRODUCT OR SERVICE

What product(s) or service(s) will be featured in this piece?

[What general benefits do your customers get from your product or service?](#)

Primary benefits

- | | |
|-------------------------------------|---------------------------------------|
| <input type="checkbox"/> Make money | <input type="checkbox"/> Save money |
| <input type="checkbox"/> Save time | <input type="checkbox"/> Avoid effort |

Secondary benefits

- | | |
|---|--|
| <input type="checkbox"/> Get more comfort | <input type="checkbox"/> Achieve greater cleanliness |
| <input type="checkbox"/> Attain fuller health | <input type="checkbox"/> Escape physical and/or emotional pain |
| <input type="checkbox"/> Gain praise | <input type="checkbox"/> Be popular and/or envied |

Other: _____

What support can you offer for these benefits? Do you have test data, surveys, testimonials, focus group reports, or other *verifiable, supportable* facts?

CREATIVE, PRODUCTION & DISTRIBUTION CONSIDERATIONS

What creative considerations exist for this piece? Do budget, production or distribution factors constrain you to a certain size, paper type, number or type of photos or illustrations, or number of colors?

Do you have complementary creative resources (copywriters, graphic or web designers, printers, web hosts, etc.) lined up? Have you budgeted for outside professional writing, design, production and/or distribution, or will those functions be handled in-house?

How do you plan to distribute this piece? (Check all that apply.)

- Regular mail
- Website or other web presentation
- Publication in business journal, etc.
- One-on-one sales presentation
- Email
- Autoresponder
- Trade show or meeting
- Courier or other special delivery
- Other: _____

TIMELINE AND APPROVALS

What is your deadline for a *finished* ready-to-distribute piece? Is this piece event-driven (upcoming trade show, sales call, etc.)? How much time will copywriters, designers, printers, etc., require to do their part?

How many days will your company require for all levels of review of the copy and design? What persons or departments will review the first draft versus the final draft? Is regulatory review required? Are personnel at other sites responsible for budget or content approval? (Executive and legal review may take weeks, not days; marketing, sales and HR review may take less time.)

Draft	To be reviewed by	No. of days
First		
Second		
Third		

Have you identified marketing materials, market or product research, or other reading that the creative team should review prior to drafting this piece? If so, how much material have you accumulated for such review? Are these materials ready to hand off?

CAMPAIGN GOALS

To establish a realistic budget for a communications campaign, you must first set campaign goals. Only when you know what you expect to gain can you intelligently decide what achieving that goal is worth.

How many impressions will this campaign generate?

For example, if this is a direct mail piece, how many are you going to mail? If this is a print advertisement, multiply the periodical's circulation times the number of issues the ad will run in.

What is your expected response rate?

How many leads do you believe this piece will generate per 100 pieces distributed?

Total leads generated
(line 1 X line 2)

What is your conversion rate for this product/service?

How many customers will you gain per 100 leads?

Total new customers
(line 3 X line 4)

What is the average lifetime value of a new customer for your business?

Total value to be generated by this campaign
(line 5 X line 6)

What percentage of your total campaign value are you willing to invest to achieve the goals you've set for the campaign?

Multiply your minimum and maximum percentages (line 8A) by the total campaign value (line 7). These figures will be your campaign budget range (line 8B).

How much do you expect to spend on production and distribution?

Be sure to include the cost of printing, ad space, postage, mailing list rental, etc.

Total creative budget (line 8B – line 9)

Budget for graphic design

Budget for copywriting

1.	_____	
2.	_____	%
3.	_____	
4.	_____	%
5.	_____	
6.	_____ \$	
7.	_____ \$	
8A.	Minimum investment %	Maximum investment %
8B.	_____ \$	_____ \$
9.	_____ \$	_____ \$
10.	_____ \$	_____ \$
	_____ \$	_____ \$
	_____ \$	_____ \$

Please be aware that, consistent with creative industry standards, most creative professionals require a 33-50% deposit prior to commencement of any work beyond the initial consultation.