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Planning and Budgeting Guide

Your guide to building a great business plan
and launching a successful promotional program.





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Check Out the Most Popular Ad Specialties

- T-shirts
- Polos/Sports Shirts
- Bags
- Writing Instruments
- Drinkware
- Tech Products
- Other Wearables
- Caps & Hats
- Desk & Office Accessories
- Health and Safety Products



YEARLONG BUDGET WORKSHEET AND PLANS AT A GLANCE

Date	1 st Quarter				2 nd Quarter				3 rd Quarter				4 th Quarter			
Events																
Purpose																
Item/No. of Items																
Unit Cost																
Misc. Fee																
Total Cost																

(No. of Items x Unit Cost) + Misc. Fees = **Total Cost**

Tip: Remember to discuss setup charges, postage costs, packaging requirements and other line items with your distributor.

Financial
Safety
Fitness
Education
Patriotic
Recognition
Technology
Sports
Seasonal
Motivation
Cultural
Fundraising
Religious
Outdoors
On the Move
Holiday
Generational
Health
Spirit
Business
Mystery
Traditional
TV Shows
Union
Musical
Internet
Landmarks
Hollywood
Academia
Performance
Mythology
Competition
Events
Artistic
Cartoon
Take Flight
Medical
Hobbies
Mystical
Sci-Fi
Construction
Network
Community
Travel
Organization
Gourmet
Timely
Modern
Classic
Pop
Essential
Stress Relief
Celebration
Cyber
Cool
Rush
Power
Free
Collectible
Luxurious
Kids' Stuff

Step-by-Step

Promotional Planning and Budgeting Guide

All of the steps are included in this guide to help you build and execute a successful promotional program. Plan out the steps and get started.

EVENT DESCRIPTION

☐ Business-to-Business

☐ Business-to-Consumer

☐ Internal

Budget: _____

Schedule: _____

Date of Event/Program Launch: _____ / _____ / _____

Order Date: _____ / _____ / _____

Production Date: _____ / _____ / _____

Delivery Date: _____ / _____ / _____

Drop Date: _____ / _____ / _____

OBJECTIVES

What are you trying to achieve?

Employees	Customers	Awareness
<input type="checkbox"/> Motivate	<input type="checkbox"/> Thanks	<input type="checkbox"/> New product launch
<input type="checkbox"/> Improve morale/ performance	<input type="checkbox"/> Traffic builder	<input type="checkbox"/> Rename/reposition
<input type="checkbox"/> Performance rewards	<input type="checkbox"/> Encourage use/trial	<input type="checkbox"/> Promote
<input type="checkbox"/> Recognition	<input type="checkbox"/> Gift with purchase	<input type="checkbox"/> Cross/upsell
<input type="checkbox"/> Other _____		

AUDIENCE

Who is your primary audience?

☐ Present customers

☐ Prospective customers

☐ Employees

☐ Students

☐ Lost customer

☐ Top customers _____%

☐ Job function or title _____

January						
Mo	Tu	We	Th	Fr	Sa	Su
	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			

Dental Awareness Month

February						
Mo	Tu	We	Th	Fr	Sa	Su
			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			

Black History Month

March						
Mo	Tu	We	Th	Fr	Sa	Su
				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

Women's History Month

April						
Mo	Tu	We	Th	Fr	Sa	Su
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					

Autism Awareness Month

Prepared for:

Company: _____

Contact: _____

Phone: _____ Fax: _____

Email: _____

AUDIENCE DEMOGRAPHICS

☐ Income level _____

☐ Geography _____

☐ Age range _____

☐ Men ☐ Women

☐ Other: _____

MESSAGE

What major point do you want to communicate?

If you could sum up your message in one sentence, what would you say?

THEME

Does your promotion fit any theme? The list on the first page of the guide may help you generate some ideas.

What is the theme of your promotion?

What tone would you like to project?

☐ Exciting

☐ Informative

☐ Urgent

☐ Authoritative

☐ Factual

☐ Competitive

☐ Educational

☐ Aggressive

MEDIUM

What is the best way to reach your audience?

☐ Direct mail

☐ Internet advertising

☐ Hand-deliver

☐ Networking

☐ Phone call

☐ Ceremonies

☐ Email

☐ Trade shows

☐ Fax

☐ Broadcast advertising

☐ Face-to-face
meeting

☐ Gift with purchase

☐ Bundled with product

How will the fulfillment be handled?

☐ Hand-delivered by assigned staff members

☐ In-house mailroom

☐ Outsourced fulfillment house

Are there any other sales collateral or marketing campaigns that this product must work with?

☐ Cover letter

☐ Your catalog/brochure/flyer

☐ Another promotional product

What type of packaging do you want to use?

☐ None

☐ Gift packaging

☐ Individually wrapped

☐ Custom

☐ Other

☐ Envelope

May						
Mo	Tu	We	Th	Fr	Sa	Su
		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		

Mental Health
Awareness Month

June						
Mo	Tu	We	Th	Fr	Sa	Su
					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

National Safety Month

July						
Mo	Tu	We	Th	Fr	Sa	Su
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				

National Ice Cream
Month

August						
Mo	Tu	We	Th	Fr	Sa	Su
			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	

National Sales
Enablement Month

September						
Mo	Tu	We	Th	Fr	Sa	Su
						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						

National Literacy Month

2019 CALENDAR OF EVENTS

Promotional Advisor:

Company: _____

Contact: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

DEADLINE

Date and plan for educating internal teams (marketing, sales, etc.).

Date ____ / ____ / ____

When and where must the message get to the audience for maximum effect?

☐ Trade show date ____ / ____ / ____

☐ Special event date ____ / ____ / ____

☐ Holiday date ____ / ____ / ____

☐ Specific date ____ / ____ / ____

☐ Product intro date ____ / ____ / ____

☐ Other date ____ / ____ / ____

The Calendar of Events on this page can help you generate ideas for the best launch date of your program.

MEASURE ITS SUCCESS

How will you track the success of your program?

FINAL APPROVAL

Signature _____ Date ____ / ____ / ____

Signature _____ Date ____ / ____ / ____

Follow up by _____ Date ____ / ____ / ____

Additional Notes:

January 2019

- 1 New Year's Day
- 21 Martin Luther King Jr. Day

February 2019

- 2 Groundhog Day
- 5 Lunar New Year
- 14 Valentine's Day
- 18 Presidents' Day

March 2019

- 17 St. Patrick's Day

April 2019

- 15 Tax Day
- 22 Earth Day
- 24 Administrative Professionals Day

May 2019

- 5 Cinco de Mayo
- 18 Armed Forces Day
- 27 Memorial Day

June 2019

- 14 Flag Day

July 2019

- 1 Canada Day
- 4 Independence Day
- 14 Bastille Day
- 28 Parents' Day

August 2019

- 19 National Aviation Day

September 2019

- 2 Labor Day
- 11 Patriot Day

October 2019

- 6 Start of Fire Prevention Week
- 7 Child Health Day
- 14 Columbus Day
- 16 Boss's Day
- 19 Sweetest Day
- 24 United Nations Day

November 2019

- 11 Veterans Day
- 28 Thanksgiving
- 29 Black Friday

December 2019

- 2 Cyber Monday
- 21 Shortest Day of the year
- 22 Start of Hanukkah
- 25 Christmas Day
- 26 First day of Kwanzaa

October

Mo	Tu	We	Th	Fr	Sa	Su
	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			

Breast Cancer Awareness Month

November

Mo	Tu	We	Th	Fr	Sa	Su
				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	

Diabetes Awareness Month

December

Mo	Tu	We	Th	Fr	Sa	Su
						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					

Safe Toys & Gifts Month