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MARKETING SOLUTIONS

Campaign & Creative Planning and Proofing Checklist

All pieces should be reviewed by at least one colleague at least one time or until only a few if any edits need to be made.



Step 1 – Setting the strategy and writing the rough draft

The strategy

- Who is your audience? Does your message appeal to them? What parts of your story will resonate with them? Who would benefit from your product or service, and who should not purchase it? Remember, most products or services are not the right fit for everyone.
- Are you telling them how your product or service will solve their SPECIFIC problem?
- Are you using language that appeals to them? For example, what's compelling for a parent may not be for an empty nester.
- Are you communicating the value clearly? Quantify the value of your product in time, money, love, or health. Explain in concrete, real terms how much value they are receiving.
- If it's complicated to explain, will visual aids like a chart, bullet points, flow chart, etc help your audience better understand what you're offering?
- Do you include at least one emotional and logical benefit?
- Will your audience understand exactly what they're getting and how to use it?

Step 1 – Setting the strategy and writing the rough draft

Structure

- Do you have a clear headline or introduction that's enticing to your target audience?
- Did you include social proof in the form of testimonials, case studies, or customer reviews?
- Did you address what would make people hesitate to buy head-on?
- Do you have a clear call to action? Tell them what they need to do and how.
- Did you tell them exactly what will happen after they click the “buy now” or “register” button?
- Does it look like the design makes sense for the type of piece you're creating? What makes sense for a brochure often doesn't make sense for an eblast.
- Does the piece look busy or cluttered?



Step 1 – Setting the strategy and writing the rough draft

Creating sales, discounts, or special offers.

- Did you include accurate dates, product descriptions, photos, or image examples so there is no question about what they are getting?
- Can you authentically make your offer urgent or scarce? If so, make it a part of your CTA. (think flash sale, limited availability, discount available for two days.)
- Are you including any bonuses? You don't have to, but creating a value-add helps. Remember, this is about delighting your customers!
- Does your offer have a guarantee? Are the terms of service and participation crystal clear?
- Is it clear how to get a hold of your company if someone has problems making their purchase or after their purchase?
- Have you included an FAQ section or how-to content so people understand how to use your product or service? [optional]



Step 2 – Proofing the rough draft for overall tone and fact-checking

- Are you using inclusive or people-first language? Examples include a person who uses a wheelchair vs. wheelchair users, board chair vs. board chairman, and using jargon or acronyms that won't make sense to most people.
- Do the pictures communicate a message that's consistent with what you're saying?
 - Does someone look scared and nervous when they should be happy?
 - Is the image flat and uninspiring?
 - Is it easy to understand if you're explaining something complicated with many details?
 - Is the image inappropriate or could it be misunderstood? (i.e., sexually suggestive, racist undertones, referring to a controversial event by accident.)
- Read your message out loud. Does the messaging make sense? Do you sound awkward or like you're talking to a friend? Can you rephrase the message so that it's shorter and more to the point?
- Read your message from the end to the beginning. This often helps with fact-checking.

Step Three – Review your website and purchase pathway

Whether the marketing piece is on or offline, going to your website is usually the next step in the customer journey. Review the entire purchase pathway through payment at least once.

- If you are offering a sale or discount, is there information about the sale on the webpage you're telling people to go to?
- Does your promo code or price rule work?
- Are you communicating any terms and conditions that you want to reinforce? Examples include date or price restrictions, health and safety protocols, or no refunds.
- Are there any places where you can put instructions to help make the purchasing process easier?
- Does your customer-facing staff have information about the offer?
- For high volume on sales. Do you anticipate that you'll have a high volume of people on your website all at once? Do you have enough staff in place? Make sure your online waiting room is enabled and working properly so your site doesn't crash.



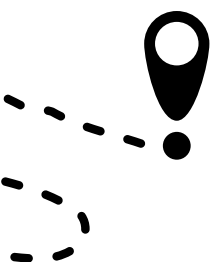
Step Three – Post Purchase/Conversion Materials

- Is there outdated information on the confirmation page or email?
- Are there any instructions or information that you want to reinforce at the end of the purchase?
- Is there a way to surprise and delight your customer at the end of purchase?



Step Four – Proof for the nitty-gritty

- The obvious
 - Correct spelling and typos
 - Prices
 - Links to additional information or URLs are working
 - Contact information – website, address, phone number, and email address is correct
- Seat maps (for arts organizations)
- Consistency (spacing, underlining, bold, paragraphs, etc.)
- Formatting (headings, images, etc.)
- Logos and correct sponsor logos (for arts organizations and nonprofits)
- For high volume on sales
 - Are the phones working?
 - Is the purchase pathway working?
 - Is the online waiting room enabled?



Thank You

If you have any questions or want to schedule a free 30-minute virtual coffee to talk about marketing and customer engagement strategies that work for you, please contact me, [click here](#) or contact me below.



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