# Communications Planning & Budgeting Checklist

**Organization:**_____

**Marketing Communications Goal:**_____ **Marketing Budget: $**_____

| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **IDENTITY MATERIALS** | | | | | | | | | | | | | |
| LOGO DESIGN | | | | | | | | | | | | | $ |
| BUSINESS CARDS/STATIONERY | | | | | | | | | | | | | $ |
| LETTERHEAD & ENVELOPES | | | | | | | | | | | | | $ |
| FAX COVER SHEETS | | | | | | | | | | | | | $ |
| NOTE CARDS | | | | | | | | | | | | | $ |
| SIGNAGE (interior & exterior) | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **BRAND AWARENESS** | | | | | | | | | | | | | |
| DIRECT MAIL | | | | | | | | | | | | | $ |
| PRINT ADS | | | | | | | | | | | | | $ |
| YELLOW PAGES (print & online) | | | | | | | | | | | | | $ |
| WEB SITE | | | | | | | | | | | | | $ |
| SEO & LOCAL SEARCH | | | | | | | | | | | | | $ |
| SOCIAL MEDIA MARKETING | | | | | | | | | | | | | $ |
| BROADCAST ADVERTISING | | | | | | | | | | | | | $ |
| VEHICLE/BUILDING GRAPHICS | | | | | | | | | | | | | $ |
| SIGNS, POSTERS AND BANNERS | | | | | | | | | | | | | $ |
| POINT-OF-PURCHASE | | | | | | | | | | | | | $ |
| COMMUNITY INVOLVEMENT | | | | | | | | | | | | | $ |
| NEWS RELEASES | | | | | | | | | | | | | $ |
| APPAREL/UNIFORMS | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **CUSTOMER COMMUNICATIONS** | | | | | | | | | | | | | |
| DIRECT MAIL | | | | | | | | | | | | | $ |
| CUSTOMIZED PURLS | | | | | | | | | | | | | $ |
| NEWSLETTERS | | | | | | | | | | | | | $ |
| E-MARKETING | | | | | | | | | | | | | $ |
| SOCIAL MEDIA MARKETING | | | | | | | | | | | | | $ |
| CUSTOMER APPRECIATION/GIFTS | | | | | | | | | | | | | $ |
| TARGET MARKETING/LUMPY MAIL | | | | | | | | | | | | | $ |
| SATISFACTION SURVEYS | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **NEW BUSINESS LEAD GENERATION & TRAFFIC BUILDING** | | | | | | | | | | | | | |
| LIST CREATION | | | | | | | | | | | | | $ |
| DIRECT MAIL | | | | | | | | | | | | | $ |
| CUSTOMIZED PURLS | | | | | | | | | | | | | $ |
| TELE-PROSPECTING | | | | | | | | | | | | | $ |
| TRADE SHOWS | | | | | | | | | | | | | $ |
| DIRECT RESPONSE BROADCAST | | | | | | | | | | | | | $ |
| WEB SITE | | | | | | | | | | | | | $ |
| SEO, LOCAL SEARCH & SEM | | | | | | | | | | | | | $ |
| E-MARKETING | | | | | | | | | | | | | $ |
| YELLOW PAGES (print & online) | | | | | | | | | | | | | $ |
| DIRECT RESPONSE MAGAZINE ADS | | | | | | | | | | | | | $ |
| NETWORKING/MEMBERSHIPS | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **SALES/PERSONAL CALL SUPPORT MATERIALS** | | | | | | | | | | | | | |
| PRESENTATION FOLDERS | | | | | | | | | | | | | $ |
| BROCHURES | | | | | | | | | | | | | $ |
| PROMOTIONAL PRODUCTS | | | | | | | | | | | | | $ |
| SELL SHEETS/FLYERS | | | | | | | | | | | | | $ |
| THANK YOU NOTES | | | | | | | | | | | | | $ |
| BROCHURES | | | | | | | | | | | | | $ |
| CASE STUDY REPORTS | | | | | | | | | | | | | $ |
| PRODUCT/SERVICE SALES SHEETS | | | | | | | | | | | | | $ |
| FLYERS & BROCHURES | | | | | | | | | | | | | $ |
| POWERPOINT PRESENTATIONS | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **EVENT PLANNING** | | | | | | | | | | | | | |
| TRADE SHOWS/OPEN HOUSE | | | | | | | | | | | | | $ |
| POWERPOINT PRESENTATIONS | | | | | | | | | | | | | $ |
| DIRECT MAIL | | | | | | | | | | | | | $ |
| CUSTOMIZED PURLS | | | | | | | | | | | | | $ |
| SIGNS, POSTERS AND BANNERS | | | | | | | | | | | | | $ |
| INVITATIONS/PROGRAMS | | | | | | | | | | | | | $ |
| BROCHURES | | | | | | | | | | | | | $ |
| PROMOTIONAL PRODUCTS | | | | | | | | | | | | | $ |
| FOLLOW-UP MATERIALS-THANK YOU | | | | | | | | | | | | | $ |
| INQUIRY DATA CAPTURE PADS | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **EMPLOYEE RELATIONS/EDUCATION** | | | | | | | | | | | | | |
| EMPLOYEE MANUALS | | | | | | | | | | | | | $ |
| NEWSLETTERS | | | | | | | | | | | | | $ |
| SIGNS, POSTERS AND BANNERS | | | | | | | | | | | | | $ |
| AWARDS AND RECOGNITION | | | | | | | | | | | | | $ |
| APPAREL/UNIFORMS/LOGOWEAR | | | | | | | | | | | | | $ |
| NAMETAGS | | | | | | | | | | | | | $ |
| OTHER: | | | | | | | | | | | | | $ |
| **MONTHLY CASH BUDGET** | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |