***NOTICE****: The following has been provided by WBA committee and section volunteers for use by member banks.   
It should be reviewed and revised as appropriate to the user-bank’s own policies, procedures, and practices.*

**Marketing Campaign Checklist**

A marketing campaign checklist should be customized to your bank’s needs and regulations. When creating a campaign for your marketing department, be sure to read through this checklist to ensure you have the following sections listed in addition to your bank’s guidelines.

All items should be answered either “Yes” or “N/A.” Any answered “No” must receive further attention.

|  | **Yes** | **No** | **N/A** |
| --- | --- | --- | --- |
| **Campaign information includes the following:** | | | |
| Name of campaign |  |  |  |
| Objective |  |  |  |
| Product(s) emphasized |  |  |  |
| Message |  |  |  |
| Benefit to the client |  |  |  |
| Timeframe |  |  |  |
| Total budget |  |  |  |
| Fine print / regulatory compliance |  |  |  |
| ROI |  |  |  |
| Measurement for success |  |  |  |
| Other: |  |  |  |
| **Campaign has identified the target audience’s:** | | | |
| Clients or non-clients |  |  |  |
| Demographics |  |  |  |
| Combined household income |  |  |  |
| Cities and/or zip codes |  |  |  |
| Age range |  |  |  |
| Gender |  |  |  |
| Homeowners *(assessed value, years at resident, % LTV, etc.)* |  |  |  |
| Other: |  |  |  |
| **Campaign incentive states:** | | | |
| Client call to action |  |  |  |
| Employee incentive and/or recognition |  |  |  |
| Other: |  |  |  |
| **Advertising channels used for campaign:** | | | |
| Digital marketing *(email, website, social, network, online banking, retargeting, content marketing, etc.)* |  |  |  |
| Traditional marketing *(newspaper, magazine, radio, TV, billboard, etc.)* |  |  |  |
| Public relations *(press releases, sources to notify, etc.)* |  |  |  |
| Direct Mail *(printing, postage, mailing list, etc.)* |  |  |  |
| Printing and design *(flyers, banners, posters, counter cards, window graphics, premiums, giveaways, etc.)* |  |  |  |
| Exhibit *(community event, trade show, etc.)* |  |  |  |
| Telemarketing *(call center, script, prospect list, estimated number of calls, etc.)* |  |  |  |
| Branch marketing *(displays, flyers, handouts, internal notification, etc.)* |  |  |  |
| Other: |  |  |  |
| **Departments notified of responsibility in campaign success:** | | | |
| Marketing |  |  |  |
| Branch managers |  |  |  |
| Retail branch |  |  |  |
| Retail lending |  |  |  |
| Business banking |  |  |  |
| Treasury management |  |  |  |
| Private banking |  |  |  |
| Wealth management |  |  |  |
| Client care |  |  |  |
| Operations |  |  |  |
| Compliance |  |  |  |
| Risk team |  |  |  |
| Other: |  |  |  |