**Promotional Products Planning Sheet and Checklist**

**Planning Sheet**

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| **Company Profile:**Use this section to draft out a brief profile of your business / charity to share with the print company. Provide as much detail as possible.  |

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| **Target Audience**Who is your target audience? i.e. who are the promotional products intended for? Are their different segments? If so, which segment is this campaign aimed at? |

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| **Purpose:**What is the reason for ordering the products? For example, to raise funds, to say thank you, to increase brand awareness, to launch a new cause or initiative? To draw customers to a website or landing page? |
| **Deadline:**What is your deadline? Depending on how tight timescales are you might want to add a few days ‘buffer time’.  |

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| **Colours:**Do you need to match colours to branding, existing artwork? List them here. Provide Pantone references where possible.  |

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| **Artwork**Do you have existing artwork that will need to be incorporated into your promotional products? If so, jot down your file names and any instructions here. |

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| **Message:**What message would you like to convey through your promotional products?  |

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| **Volume:**How many promotional items do you wish to order? |

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| **Features:**List any special features here.  |

**Checklist**

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| **QUOTE 1** |
| Company Name: |  |
| Contact Name: |  |
| Email: |  |
| Telephone Number: |  |
| Staff Knowledge: |  |
| Notes / Impressions: |  |
| Received Samples? |  |
| Quote: |  |

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| **QUOTE 2** |
| Company Name: |  |
| Contact Name: |  |
| Email: |  |
| Telephone Number: |  |
| Staff Knowledge: |  |
| Notes / Impressions: |  |
| Received Samples? |  |
| Quote: |  |

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| **QUOTE 3** |
| Company Name: |  |
| Contact Name: |  |
| Email: |  |
| Telephone Number: |  |
| Staff Knowledge: |  |
| Notes / Impressions: |  |
| Received Samples? |  |
| Quote: |  |

**Status:**

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| Print Company Selected: |  |
| Brief Sent: |  |
| In Production:  |  |
| Received Proofs: |  |
| Changes to Proofs?Record any changes here. |  |
| Proofs Checked: |  |
| Final Approval: |  |
| Received Products: |  |