**Promotional Products Planning Sheet and Checklist**

**Planning Sheet**

|  |
| --- |
| **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. |

|  |
| --- |
| **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? |

|  |
| --- |
| **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’. |

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

|  |
| --- |
| **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. |

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

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

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

**Checklist**

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

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

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

**Status:**

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