



TEMPLATES / FREE PDF

Campaign Planning Worksheet

Bring the objective, audience, sequence, and responsibilities into one campaign plan.

**PLAN IT.
MAKE IT.
YELL IT.**





01 / Define the campaign before the posts

A campaign connects several pieces of content around one purpose. Start with the outcome and the experience you want to create.

1

Outcome

Choose one primary objective and the evidence you will use to evaluate it. Avoid treating every available metric as equally important.

2

Audience and offer

Explain who the campaign serves and what is relevant to them. Verify the details behind any invitation or offer.

3

Message and destination

Identify the main message and the page or action each post should support. Check the destination before producing the assets.

4

Scope and constraints

List available time, people, assets, and budget if applicable. Define what is outside the campaign so the team can stay focused.

PUT IT TO WORK / Use the worksheet on page 4 to capture your decisions.



02 / Build the sequence and handoffs

Give each phase a clear job. An announcement, explanation, and follow-up can support the same goal without repeating the same copy.

1

Before launch

Prepare the destination, creative, approvals, and response plan. Confirm that dependent teams are ready.

2

During the campaign

Publish the planned sequence and monitor questions. Keep a named owner for corrections and time-sensitive decisions.

3

After the main announcement

Answer recurring questions and share relevant supporting content. Avoid continuing an offer after its details have changed.

4

Review and next steps

Summarize outcomes, limits in the data, and the next decision. Keep the learning record with the original plan.

PUT IT TO WORK / Use the worksheet on page 4 to capture your decisions.



Your working sheet

Print this page or annotate it in your PDF reader. Add your own details, then give each next step an owner.

● Campaign name, dates, and objective

● Audience need and core message

● Destination and verified offer details

● Sequence: before / during / after

● Owners, approvals, and dependencies

● Success measures and review date
