



Getting Started with the Zoho Marketing Planner

What is a **Marketing Planner** in Zoho Marketing Automation?

Marketing planner helps you build, budget, and measure your marketing activities.

Marketing Planner brings together all your data to one place. You can manage all of your data from different plans without needing to switch between different applications or tools.

A plan can be many things, such as:

- Brand Awareness:

Making people aware of your brand and what it does.

- Lead Generation:

Trying to increase the number of people showing interest in your services.

- Increase Sales:

Planning to increase the rate of sale.

- Customer retention:

Ability to make a customer stay or keep them buying your services.

- Product Launch:

Launching of a new product or a service.

- Lead nurturing:

Growing a lead by interacting more with them and trying to convert them into customers.

Aim

You may also need an aim for your plan. While this sounds similar to a goal, it plays a distinct role. An aim is the overall reasoning for your plan, as well as the ultimate outcome. This is a broader term than a goal, which is a short-term target.

Budget and Dates

There are several factors you'll need to focus on when setting your budget. Your plan may end up exceeding your budget, forcing you to prioritize on your primary goals. Similarly, set a realistic and achievable date for your Plan.

You need to consider your capacity and resources at your disposal that will help you achieve your Goal within that timeframe.

Set an achievable target within your budget, and the Zoho Marketing Planner will help you reach it with its diverse range of data reports and analysis.

Activities

You choose a particular activity in order to achieve your goal. Activities can be classified into two types: Digital Activities and Offline Activities.

Digital Activities

Includes any form of activity/campaign that can be operated and tracked via the internet in order to retain and obtain customers.

Email

Emails sent to a potential or a current customer in a commercial sense in order to increase sales and revenue.

SMS

SMS campaigns are sent via mobile texts using cellular services for commercial purposes.

Others

This can include any other digital form of activity that is used for promotions like Social Media ads, Pop up Ads, and Promotions.

Offline Activities

Activities that promote your services that are done offline cannot entirely be tracked online.

Print Ads

Physically printed media like posters and pamphlets

Postal Ads

Advertising mailers you send to customers in hopes of getting them to engage with your services, like coupon envelopes, and advertising circulars.

Billboards

Large posters in an advertising space put up in public places in order to catch the attention of pedestrians and motorists.

Endorsements

Influential or famous personalities use their fame to promote and advertise your services and associate their value to your services, which will bring in audience.

Trade shows

Exhibitions where you can showcase and demonstrate your products and services to the public and hopefully gain some customers.

Events

Private events you organize or sponsor in order to promote and create visibility for your products.

Others

Any other forms of in-person activities that is done outside the internet with help from offline services.

Some terms to be familiarized with

CPA - Cost per Acquisition is the cost incurred for attaining one Lead from the overall budget. It is calculated by dividing the total expense of the plan by the number of leads generated through the plan.

Leads - The potential contact that is acquired for the business.

Contacts - Visitors that have been converted into a regular user that has interacted or purchased your products and services.

Budget - The estimated amount of money that you are ready to spend on your plan in any [currency](#) of your preference.

 Note: You can change your currency settings according to your preference in the settings. Set your preferred currency so that it reflects all across the Marketing Automation tool.

Expense -The money spent from your budget for the plan and acquiring leads.

Channels - The methods of communication or contact outlined in the planner, including Email, SMS, Print Ads, and Posters.