

Content Planning Worksheet

Title / Topic:

Basic Point:

Project Team:

Proofing Contact:

Due Date:

Publication Date:

Timeout Date:

Persona and/or Buyer Stage (who are we trying to reach?)

Channels

Organic Digital ☐ Website / Blog ☐ Emails (audience:) ☐ Social media ☐ Online banking ☐ App messaging ☐ Podcast ☐ Videos Self-distributed Materials ☐ Mailer (format:) ☐ Statement insert / onsert ☐ Newsletter ☐ Flyers ☐ On-hold messaging ☐ ATM Screens In-branch materials ☐ Signage ☐ Branch screens ☐ Table tents ☐ Transaction wraps ☐ Clothes	Paid Digital ☐ Banner ads ☐ Search ads ☐ Sponsored content ☐ Retargeting ads ☐ OTT & Pre-roll ads ☐ Podcasts & online audio Paid Media ☐ Newspaper ads ☐ Weekly print ads ☐ Radio ads ☐ Television ads One-on-one contacts ☐ Handouts / one sheets ☐ Outbound calls ☐ Cards & swag ☐ Media outreach Big Stuff ☐ Car wraps ☐ Location paint ☐ Business Cards ☐ Events
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Collateral Needed:

Digital (list all image sizes and/or digital items needed)	Print (list all document sizes and print details)	Multimedia (list needs for audio, video, animation, etc)

KPI and Goals (How are we measuring success?):