

Mobile Marketing Strategy Planning Worksheet

Chapter 1: Laying the Mobile Marketing Strategy Foundation

Why do you want to implement a mobile marketing strategy?

What are your business goals?

Identify the mobile marketing tools you will use.

Mobile technology: _____

Mobile analytics: _____

Email marketing platform: _____

Mobile payments: _____

Notes:

Map the Client Journey

Basic journey: Awareness > Consideration > Decision > Purchase/Delivery and Use > Loyalty and Advocacy

As you go through outlining the buyer's journey, think about how the user, your client, or prospect feels at each stage. Emotions will influence one's decision to act. Try to reduce discomfort or friction in the areas that may cause negative emotions.

Awareness: How does a person become aware of your mobile channel?

How does the user or audience feel at this step?

Consideration: What competitors or other options are available?

How does the user or audience feel at this step?

Decision: What factors will the target audience consider in making a decision to take action and use your mobile channel? What are the target audience's motivations?

How does the user or audience feel at this step?

Purchase/Delivery and Use: How will a person download the app, make a purchase, or take the desired conversion action?

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To use your mobile app, receive a text message, or engage with your mobile marketing channel, what's involved?

How does the user or audience feel at this step?

Loyalty and Advocacy: What can you implement to keep customers engaged or to continue using your mobile app?

How can you encourage advocacy? (for example, share on social media)

Is there an incentive (for example, promotional code, discount) that can be offered?

How does the user or audience feel at this step?

Notes:

Chapter 3: Attract Your Ideal Mobile Clients

Identify your ideal client. Complete the persona profile for each persona or target audience segment. Note: You should focus on one or two personas.

Buyer Persona Profile Worksheet

	Title: _____	COMPANY INFO	Revenues: _____
	DEMOGRAPHIC PROFILE	Company Size: _____	Industry: _____
Job title: _____		# of Employees: _____	Geographic Locations: _____
Years of experience: _____		PROBLEM/ PAIN DEFINITION	
Age range: _____		Current situation: _____	
Role: _____		What do they use today? _____	
Responsibilities: _____		What work around might be in place? _____	
PSYCHOGRAPHICS		Buyer's Value Proposition:	
Motivations:		I need to (problem): _____	
1. _____		in order to (goal): _____	
2. _____			
3. _____			
Frustrations:		Purchaser / User Goals: _____	
1. _____		Highest priority: _____	
2. _____		Needs: _____	
3. _____		Objectives: _____	
Social Media Participation:		Purchase and Communication Preferences	
Where do they participate? _____		Media consumption: _____	
How do they participate? _____		Research methods: _____	
Listen Contribute Both		Trusted resources: or influencers: _____	
		Search keywords / phrases: _____	

Notes:

Chapter 4: Develop the Mobile Marketing Plan

Select your mobile marketing channel.

What type of mobile marketing do you plan to implement?

(for example, mobile app, SMS text messaging)

Why did you select this type of mobile marketing?

How does this mobile marketing channel align with your business objectives or goals?

Follow the simple AIDA model to develop your mobile marketing plan.

Awareness: *How will you create awareness?*

List the marketing tactics you will use to promote your mobile marketing channel.

- ---
- ---
- ---
- ---

Interest: *How will you generate interest?*

Note: Think about the C and F in C-F-O—convenience and fun.

Desire: *How will you create desire?*

Note: Think about the O in C-F-O—offer.

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What type of compelling and/or exclusive offer can you extend to prospects or customers?

Action: What will be your call to action? What do you want the prospect or customer to do?

Communications Plan

Prelaunch communications:

Launch communications:

Postlaunch communications:

Feedback

Give your target audience or users the opportunity to express their opinions and provide feedback on the mobile experience. This will provide you with insight on ways to improve or enhance your mobile marketing experience.

Metrics and Key Performance Indicators (KPIs)

How will you measure success? KPIs and metrics will be based on the mobile channel selected. Here are a few examples:

Engagement – number of people who clicked: _____

Conversions – number of users: _____

For additional measurements, tracking, and KPIs, please refer to the **Mobile Marketing Strategy Scorecard file**.

Chapter 5: Successful Mobile Marketing Campaigns

Write down your ideas for a mobile marketing campaign.

Conclusion

You now have a decision to make. Are you going to implement your mobile marketing strategy on your own? Or are you going to get assistance from a third party?

List possible third-party resources you may engage for either app development or to help implement your mobile marketing strategy.

Legal Considerations

For additional information regarding guidelines, rules, and regulations surrounding mobile marketing, consult your business's legal counsel.

You can obtain some general information from the following sites:

- [Federal Trade Commission \(FTC\)](#)
- [Telephone Consumer Protection Act \(TCPA\)](#)
- [Children's Online Privacy Protection Act \(COPPA\)](#)

Notes:
