

# CREATING A PROMOTIONAL CALENDAR

“A promotional calendar can help you plan out your promotions for the year – using seasonality & strategy as a guide.”

- LISTEN TO THE FULL PODCAST EPISODE AT [WWW.BRAIDCREATIVE.COM/CREDITUNIONPODCAST](http://WWW.BRAIDCREATIVE.COM/CREDITUNIONPODCAST)

Use this calendar to get a broad view of your promotional and branded campaigns. What are the themes? When do you have natural peaks or lulls? When are there seasons or events you can leverage? Be sure to gather and share the results from your marketing efforts at least once a quarter!

Below is an example of how you might use this calendar - a blank one is on the next page for you to do!

Q1	JANUARY	FEBRUARY	MARCH
	PRIMARY CAMPAIGN: <i>Brand</i> SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN: <i>Signature Loan</i> SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN: <i>Home loans</i> SECONDARY CAMPAIGN: <i>Checking</i> GATHERING RESULTS: <i>Signature</i>
Q2	APRIL	MAY	JUNE
	PRIMARY CAMPAIGN: <i>Home Loan</i> SECONDARY CAMPAIGN: <i>Checking</i>	PRIMARY CAMPAIGN: <i>Home Loan</i> SECONDARY CAMPAIGN: <i>New Members</i>	PRIMARY CAMPAIGN: <i>Auto Loan</i> SECONDARY CAMPAIGN: <i>Home Equity</i> GATHERING RESULTS: <i>Home Loan</i>
Q3	JULY	AUGUST	SEPTEMBER
	PRIMARY CAMPAIGN: <i>Auto Loan</i> SECONDARY CAMPAIGN: <i>Home Equity</i>	PRIMARY CAMPAIGN: <i>Brand</i> SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN: <i>Student Checking</i> SECONDARY CAMPAIGN:  GATHERING RESULTS: <i>Auto Loan</i>
Q4	OCTOBER	NOVEMBER	DECEMBER
	PRIMARY CAMPAIGN: <i>Brand</i> SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN: <i>Credit Card</i> SECONDARY CAMPAIGN: <i>Signature Loan</i>	PRIMARY CAMPAIGN: <i>Credit Card</i> SECONDARY CAMPAIGN: <i>Signature Loan</i> GATHERING RESULTS: <i>Credit Card</i>

  

PROMOTION	DATES RUNNING	TACTICS
<i>Brand</i>	<i>Feb 1 - March 1</i>	<i>Bill stuffer; social; web banner; rack card</i>
<i>Signature Loan</i>	<i>Jan 15 - March 15</i>	<i>TV; Streaming; Radio; Outdoor; Branch</i>
<i>Checking</i>	<i>March 1 - April 15</i>	<i>Radio; Social / Digital; Streaming</i>

# PROMOTIONAL CALENDAR FOR \_\_\_\_\_ (YEAR)

<b>Q1</b>	<b>JANUARY</b>	<b>FEBRUARY</b>	<b>MARCH</b>
	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:  GATHERING RESULTS:
<b>Q2</b>	<b>APRIL</b>	<b>MAY</b>	<b>JUNE</b>
	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:  GATHERING RESULTS:
<b>Q3</b>	<b>JULY</b>	<b>AUGUST</b>	<b>SEPTEMBER</b>
	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:  GATHERING RESULTS:
<b>Q4</b>	<b>OCTOBER</b>	<b>NOVEMBER</b>	<b>DECEMBER</b>
	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:	PRIMARY CAMPAIGN:  SECONDARY CAMPAIGN:  GATHERING RESULTS:

PROMOTION	DATES RUNNING	TACTICS