Small business promo planner

Pick the right item for the job, set a budget and order with confidence.

Business _____ **Date** _____

1. Tick the job you want your items to do

- ☐ **Keep our number handy for next time**
  Try: Fridge magnets, calendars, notepads, stubby holders
- ☐ **Be seen around town**
  Try: Tote bags, caps, umbrellas, drink bottles
- ☐ **Make our team look professional**
  Try: Polos, caps, jackets, name badges
- ☐ **Thank a client or reward a referral**
  Try: Premium drinkware, quality pens, brand-name gifts
- ☐ **Draw people to a stall, market or expo**
  Try: Pens, lip balm, sunscreen, small tech
- ☐ **Welcome a new customer or staff member**
  Try: A small pack of two or three useful items

2. Answer these before you ask for a quote

Who will receive the items? _____ **How many people, roughly?** _____

Date you need them in hand _____ **Budget per person** _____

3. Before you approve an order

- ☐ Logo supplied as a vector file (AI, EPS, SVG or PDF)
- ☐ Phone number or website added if the item should bring in enquiries
- ☐ Logo kept modest on items people use in public
- ☐ Digital proof checked at actual size, including small text
- ☐ Quantity covers the next three to six months, not three years
- ☐ Delivery date confirmed in writing
- ☐ Product checked for batteries, magnets or small parts if children may get it
- ☐ Plan for how and when each item will be handed over

Items to skip

Novelty plastic that gets thrown out in weeks, cheap tech from unknown brands, USB drives, low-quality t-shirts and trend items that date by next season.

Budget and results tracker

Work out what to spend, then record what each item brings in.

What is a new customer worth to you?

Average sale $	x Purchases per year	x Years they stay	= Value of one customer $

Use this figure to decide what you're comfortable spending to win or keep one customer. Many small businesses spend a few dollars per item on prospects and more on existing clients and referrers.

Order plan and results

Item	Given to	Qty	$ each	Total $	Handed out	Enquiries	$ per enquiry
Total							

Review after three to six months

Which item brought in the most enquiries for the money?

Which items are customers still using when you see them?

What will you reorder, change or drop next time?

Need a shortlist? Tell Crest Promos what your business does, who the items are for and your budget, and we'll send options and an itemised quote. Quotes and digital proofs are free. 1300 084 102 · crestpromos.com.au