Co-Marketing Plan

STRATEGIC GOALS

Identify strategic goals for the relationship, such as, generating leads, aquiring new customers, raising brand awareness or customer retention.

DESIRED RESULTS

Identify specific metrics you and your partner are trying to accomplish, such as a certain increase in website traffic, leads, new customers, or integration installs.

ACTIVITIES AND TIMELINE

List the activities you want to enagege in together. These can be specific like co-hosting an event, sharing data, or more open ended. Establish when they'll be completed and when you'll follow up on goals.

DATA SHARING

If you plan on sharing account data, specify what type of account data, for what purpose, what time period, and how the data will be shared.

BUDGET

Identify what budget will be creating and distributing the content, and which party will be contributing how much.

CONTACTS FOR EACH TEAM

Identify names, emails, and, if relevant, phone numbers for the people on each team who will be part of the projects.

TRACKING

Specify how you will be tracking results and what data will be shared with respect to results of the campaign.

NOTABLE RESTRICTIONS

Link to legal agreements that govern the relationship and identify key highlights, like restrictions on brand name, and who owns any assets created.