

# WORKBOOK

THE CPG PRE-SHOP  
PLANNING TOOL KIT



**VISIT US**

[WWW.ADAPTED.COM](http://WWW.ADAPTED.COM)

**EMAIL US**

[INFO@ADAPTED.COM](mailto:INFO@ADAPTED.COM)

THE CPG PRE-SHOP PLANNING

# CHECKLIST

---



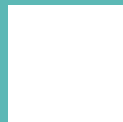
## ANALYZE PERSONAS

Understand your target audience's demographics, behaviors, and preferences.



## USE ADD-TO-LIST ADS

Utilize "Save Now, Buy Later" strategies to capture consumer intent.



## CREATE CONTENT

Develop relevant content based on identified influences (e.g., recipes).



## TRACK AND ANALYZE

Use robust tracking to measure campaign success & make data-driven adjustments.



## TARGET CONTEXTUALLY

Implement advertising strategies that align with consumer interests and behavior.



## A/B TEST

Continuously optimize your campaigns by testing different ad variations.



## TARGET DEMO GROUPS

Tailor campaigns to different age groups, genders, and household compositions.



## PLAN SEASONALLY

Align your campaigns with seasonal trends and holidays.



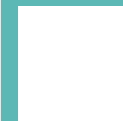
## OPTIMIZE CREATIVE

Create compelling visuals and copy that resonate with pre-shop planners.



## ENGAGE POST-SHOP

Foster ongoing engagement with your brand beyond the pre-shop phase.



## REACH RETAILERS

Activate campaigns across multiple retailers to reach diverse shopper bases.



## ASSESS ROI

Evaluate the return on investment for each campaign to maximize efficiency.

THE CPG PRE-SHOP PLANNING

# WORKSHEET

## Q1 2024

QUARTERLY MARKETING GOALS:

QUARTERLY AD BUDGET:

CAMPAIGN GOALS

NAME \_\_\_\_\_

- Awareness
- Sales
- Loyalty

TARGET PERSONA

AGE \_\_\_\_\_

BEHAVIORS \_\_\_\_\_

PREFERENCES \_\_\_\_\_

SEASONAL TENT-POLE EVENTS

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

CONTEXTUAL AD TARGETING

- Digital Recipes
- Diet/Health Planning Intent
- Meal Occasion (Holidays)
- Meal Occasion (Themes, eg BBQ)
- Digital Shopping List Use

RETAILER PREFERENCES

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

DON'T FORGET

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

THE CPG PRE-SHOP PLANNING

# WORKSHEET

## Q2 2024

QUARTERLY MARKETING GOALS:

QUARTERLY AD BUDGET:

CAMPAIGN GOALS

NAME \_\_\_\_\_

- Awareness
- Sales
- Loyalty

TARGET PERSONA

AGE \_\_\_\_\_

BEHAVIORS \_\_\_\_\_

PREFERENCES \_\_\_\_\_

SEASONAL TENT-POLE EVENTS

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

CONTEXTUAL AD TARGETING

- Digital Recipes
- Diet/Health Planning Intent
- Meal Occasion (Holidays)
- Meal Occasion (Themes, eg BBQ)
- Digital Shopping List Use

RETAILER PREFERENCES

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

DON'T FORGET

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

THE CPG PRE-SHOP PLANNING

# WORKSHEET

## Q3 2024

QUARTERLY MARKETING GOALS:

QUARTERLY AD BUDGET:

### CAMPAIGN GOALS

NAME \_\_\_\_\_

- Awareness
- Sales
- Loyalty

### TARGET PERSONA

AGE \_\_\_\_\_  
\_\_\_\_\_

BEHAVIORS \_\_\_\_\_  
\_\_\_\_\_

PREFERENCES \_\_\_\_\_  
\_\_\_\_\_

### SEASONAL TENT-POLE EVENTS

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

### CONTEXTUAL AD TARGETING

- Digital Recipes
- Diet/Health Planning Intent
- Meal Occasion (Holidays)
- Meal Occasion (Themes, eg BBQ)
- Digital Shopping List Use

### RETAILER PREFERENCES

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

### DON'T FORGET

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

THE CPG PRE-SHOP PLANNING

# WORKSHEET

## Q4 2024

QUARTERLY MARKETING GOALS:

QUARTERLY AD BUDGET:

### CAMPAIGN GOALS

NAME \_\_\_\_\_

- Awareness
- Sales
- Loyalty

### TARGET PERSONA

AGE \_\_\_\_\_  
\_\_\_\_\_

BEHAVIORS \_\_\_\_\_  
\_\_\_\_\_

PREFERENCES \_\_\_\_\_  
\_\_\_\_\_

### SEASONAL TENT-POLE EVENTS

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

### CONTEXTUAL AD TARGETING

- Digital Recipes
- Diet/Health Planning Intent
- Meal Occasion (Holidays)
- Meal Occasion (Themes, eg BBQ)
- Digital Shopping List Use

### RETAILER PREFERENCES

- 1 \_\_\_\_\_  
\_\_\_\_\_
- 2 \_\_\_\_\_  
\_\_\_\_\_
- 3 \_\_\_\_\_  
\_\_\_\_\_

### DON'T FORGET

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

THE CPG PRE-SHOP PLANNING

# WORKSHEET

## Q1 2024

CAMPAIGN RESULTS

	PLANNED	ACTUAL
SPEND		
IMPRESSIONS		
CLICKS		
CONVERSIONS		
ROAS		

## Q2 2024

CAMPAIGN RESULTS

	PLANNED	ACTUAL
SPEND		
IMPRESSIONS		
CLICKS		
CONVERSIONS		
ROAS		

## Q3 2024

CAMPAIGN RESULTS

	PLANNED	ACTUAL
SPEND		
IMPRESSIONS		
CLICKS		
CONVERSIONS		
ROAS		

## Q4 2024

CAMPAIGN RESULTS

	PLANNED	ACTUAL
SPEND		
IMPRESSIONS		
CLICKS		
CONVERSIONS		
ROAS		