

Loop Campaign Planning Worksheet

Campaigns don't fail because the creative missed. They fail because nothing was ordered. Use this worksheet to build the structure before you touch the creative. 45–60 minutes, start to finish.

How to Use This

Work through each stage in order. Each section stands alone — no episode required, though it helps. The AI prompts are embedded where they cut real time. Use them or skip them. Either way, fill in every field before moving to the next stage.

The three rules that made Loop work:

- Framework beats creative chaos
- Sequencing beats simultaneous launch
- Iteration beats perfection

Stage 1: Audience + Core Pain Point

Lock your audience and your primary pain point before touching anything else. The Loop team did this before a single creative decision was made.

1A. ICP Definition

Campaign name:

Campaign quarter / timeline:

Job title(s) we're targeting:

Company size / stage:

What changed for this audience recently? (*budget cycle, market shift, new pressure, new tool — if nothing changed, ask why this campaign is happening now*)

Why does this campaign matter to them right now, not six months ago?

1B. Pain Point Ranking Table

List every pain point this audience has. Rank by urgency. Your campaign builds around #1 only — the rest inform supporting copy.

Rank	Pain Point	Why It's Urgent Right Now	Confidence (High / Med / Low)
1			
2			
3			
4			

Primary pain point (locked):

Why this one over #2?

AI Prompt: Pain Point Sharpening

Use this if you're not confident in your ranking or want a challenge.

I'm building a B2B marketing campaign targeting [audience description]. They work at companies with [size/stage]. The core problem I believe matters most right now is [pain point]. Here's their situation:
[context, constraints, recent changes].

Challenge my assumptions. Where is this pain point too broad, too narrow, or misaligned with what this audience would actually prioritize? Suggest a sharper version I can test.

1C. Language Sample Log

Capture exact phrases your audience uses. Pull from call transcripts, support tickets, community threads, sales notes. Do not paraphrase – their words, not yours.

Source	Exact Quote or Phrase	Emotional Intensity (High / Med / Low)

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Phrases that appear more than once:

The one phrase that best captures the pain in their words:

AI Prompt: Customer Language Extraction

Use this to mine transcripts, tickets, or threads at volume. I'm attaching [transcripts / support tickets / community threads / content comments] from our audience. Identify recurring language they use to describe [pain point or topic]. Pull specific phrases, frustrations, and shorthand. Organize by frequency and emotional intensity. I need language that sounds like them, not our internal positioning docs.

1D. Signal Source Inventory

Before commissioning new research, check what you already have. If the pain is real, signals exist.

Signal Source	Reviewed?	Key Finding
Customer call transcripts	Y / N	
Support tickets	Y / N	
Sales objection notes	Y / N	
Community threads / forums	Y / N	
Content performance data	Y / N	
Win/loss notes	Y / N	
Other:	Y / N	

Biggest signal found:

Any gap that requires new research before moving to Stage 2?

Don't move to Stage 2 until the primary pain point is locked and sourced.

Stage 2: Differentiated Positioning

The Loop team ran competitive analysis and customer research before writing a single line of copy.

Your positioning starts with knowing what's already saturated — not with what sounds good internally.

2A. Category Saturation Map

What is your audience already scrolling past?

Competitor / Campaign	Their Core Message	Language to Avoid

Where is the category converging? *(claims everyone is making)*

The gap nobody is occupying:

AI Prompt — Competitive Message Audit

I'm launching a campaign in [category] targeting [audience]. Here is current competitor messaging: [paste taglines, landing page copy, ad copy]. Identify patterns. What language do they all share? Where is the category converging? What angles is nobody covering? I need the positioning gap, not the overlap.

2B. Point-of-View Statement

Complete this sentence. Then pressure-test it below.

"Most [category] campaigns say _____. We believe _____, and here's the proof: _____."

Would a skeptical CMO push back on this? *(If no, it's not sharp enough)*

Where does it hold up?

Where does it break?

AI Prompt – POV Pressure Test

Here's my proposed campaign angle: [core message]. My audience is [description]. Stress-test this. Where does it hold up? Where does it break? What would a skeptical CMO push back on? Give me the two strongest counterarguments and how to address them without watering down the message.

2C. Message Hierarchy

One core message. Two to three proof points. If a team member can't repeat the core message from memory after reading it once, cut further.

Core message (*one sentence*):

Proof point 1:

Proof point 2:

Proof point 3 (*optional*):

2D. Screenshot Test

Read the core message as if you're scrolling a feed.

Question	Answer
Would someone stop on this?	Y / N
Could this belong to a competitor?	Y / N
Can a team member repeat it from memory right now?	Y / N

Does it use the audience's language from Stage 1C? Y / N

If anything broke, what changes?

Don't move to Stage 3 until the core message passes the screenshot test and the team can say it from memory.

Stage 3: Channel Strategy + Sequenced Rollout

The Loop team didn't launch everywhere on day one. They started on one channel, got signal, refined, then expanded. Launching everything simultaneously means you can't learn from anything.

3A. Channel Constraints Check

Do this before assigning roles. Most sequencing fails because teams overcommit.

How many channels can your team manage well simultaneously?

(Be honest – mediocre on five beats excellent on two)

Channels available to this campaign:

Channels you're cutting from this campaign and why:

3B. Channel-Role Assignment

Every channel gets one job. No channel gets two.

Channel	Role (Awareness / Message Test / Engagement / Conversion)	Owner	Active From (Week #)

Lead channel *(where you'll get the fastest signal on whether messaging works):*

Why this channel first?

AI Prompt: Channel-Role Mapping

I'm planning a B2B campaign with these goals: [list]. My audience is active on [channels]. My team can manage [number] channels well. For each channel, assign one role: awareness, message test, engagement, or conversion. Recommend a launch sequence based on where I'll get the fastest signal on whether messaging is working.

3C. Launch Sequence

What goes live when – and what threshold triggers the next expansion.

Week	Channel(s) Active	What Launches	Signal Needed to Expand
Week 1			
Week 2			
Week 3			
Week 4			
Week 5+			

What gets cut if the team is stretched? *(decide now, not mid-campaign)*

3D. Content-to-Channel Mapping

Same message, different execution. Copying the same copy across every channel is not a multi-channel strategy.

Channel	Format	Native Requirements	Repurposed or Native?
Email			

LinkedIn			
Paid social			
Video / YouTube			
Blog / SEO			
Partner / creator			
Other:			

AI Prompt – Copy Variations

Core message: [X]. Supporting points: [Y, Z].

Generate copy variations for [channels]. For each, produce 3 variations of the primary CTA and 2 variations of the headline or hook. Brand voice: [describe or paste guidelines]. Flag which variations are best for A/B testing and why.

3E. Ownership + Handoff Log

Most sequencing fails operationally, not strategically. Define this before launch or it breaks during it.

Task	Owner	Deadline	Handoff To	Expected Friction
Brief sign-off				
Copy				
Design assets				
Approvals				
Scheduling / publishing				
Paid setup				

Reporting setup				
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Where have handoffs broken down on past campaigns?

Don't launch until every row in this table has a name in the Owner column.

Stage 4: Measurement + Iteration

What the Loop team learned in week one completely changed their approach in week two. That was a built-in mechanic, not a post-mortem finding. If your measurement plan only tells you whether the campaign worked after it's over, you've missed the window.

4A. KPI Map by Campaign Stage

Leading indicators tell you whether to adjust. Lagging indicators tell you whether it worked. You need both, and you need to know which is which before launch.

Stage	KPI	Type (Leading / Lagging)	Target	Decision It Triggers
Launch (Wk 1–2)				
Launch (Wk 1–2)				
Mid-campaign (Wk 3–4)				
Mid-campaign (Wk 3–4)				
Post-campaign				
Post-campaign				

The one number that tells you fastest if something is off:

AI Prompt – KPI Recommendation

I'm running a B2B campaign with these objectives: [list].

Channel mix: [list].

Duration: [X weeks].

Company size/stage: [description].

Recommend leading and lagging KPIs for each campaign stage. For each KPI, suggest a realistic threshold and the decision it should trigger: adjust, scale, or kill.

4B. Iteration Trigger Definitions

Pre-define every threshold that prompts a change. Decisions made under pressure without pre-set triggers are slower and worse.

Signal	If This Happens...	Then Do This	Who Decides
Email open rate	Falls below ____%		
Email CTR	Falls below ____%		
Paid CTR	Underperforms vs. benchmark by ____%		
Landing page conversion	Falls below ____%		
Lead channel engagement	Hits ____ threshold	Activate next channel	
Other:			

4C. Weekly Check-In Log

A 30-minute weekly review beats a two-hour debrief after the campaign ends. If this isn't on the calendar before launch, it won't happen.

Standing check-in: Day ____ at ____ with:

Week	What the Data Said	Decision Made	What Changes Next Week	Owner
1				
2				
3				
4				

5				
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4D. What Broke Log

Document failures in real time. This is the most important section in Stage 4. The Loop team can name exactly what didn't work and when they changed it. Most teams can't, because they waited until the debrief to reconstruct a timeline that was already gone. Fill this in during the campaign, not after.

Date	What We Tried	What Happened	What We Changed	Result

The most important thing this campaign taught us mid-flight:

AI Prompt – Iteration Scenario Planning

Campaign setup: [paste channel mix, messaging, KPIs, launch sequence].
It's end of Week 1. Early signals: [describe data].

Recommend specific adjustments to messaging, channel allocation, or budget. For each, explain what data point triggers the change and what the expected impact is.

4E. One-Page Debrief

Campaign name + dates:

Results:

KPI	Target	Actual	Delta

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What did we learn that changes our next campaign?

What do we repeat?

What do we never do again?