





Data Strategy
Goal Setting

RHEA+KAISER

PURPOSE OF THIS WORKSHEET

Use this template to define clear, actionable goals for your data-driven marketing strategy. Follow the SMART criteria to ensure each goal is Specific, Measurable, Achievable, Relevant and Time-bound.

We have added examples to illustrate how all of these pieces work together. Beneath each example there is a space where you can enter your information.

One last pro tip: Keep your goals visible and regularly communicate progress to your team. A shared vision fosters collaboration and accountability.

SECTION 1: GOAL OVERVIEW

Goal Name	***Ex:* Increase customer rentention**
Goal Statement	***Ex:* Increase customer retention by 15% over the next 12 months by using personalized marketing campaigns**
Primary Objective	***Ex:* Improve customer loyalty and repeat purchases**
Key Stakeholder	***Ex:* Marketing team, sales team, data analyst**

SECTION 2: SMART BREAKDOWN

SMART Criteria	Details
Specific	**What exactly do you want to achieve? (*Ex.* Retain 15% more customers in a year)**
Measurable	**How will you measure success? (*Ex.* Retention rate increase in CRM*)***
Achievable	**Is the goal realistic based on your resources? (*Ex.* Yes, using CRM and email automation)**
Relevant	**Why does this goal matter to your business? (*Ex.* Customer retention drives profitability)**
Time-Bound	**What's the deadline for achieving this goal? (*Ex.* End of 4th quarter)**

SECTION 3: DATA INSIGHTS AND RESOURCES

What data will you use?	***Ex:*** **CRM data, purchase history, email engagement metrics**
What tools will you use?	***Ex:*** Email marketing software, loyalty program analytics
What resources are needed?	***Ex:*** Budget for email campaigns, team training

SECTION 4: MILESTONES AND METRICS

Goal Name	Deadline	Metric for Success
Ex: **Launch loyalty email campaign**	**End of first quarter**	**Campaign delivery rates > 95%**
Ex: **Segment high-risk customers**	**Middle of second quarter**	**100% segmentation completed**
Ex: **Analyze retention trends**	**End of third quarter**	**Retention rate report card**

SECTION 5: REVIEW AND ADJUST

Review Schedule	***Ex:*** **Monthly meetings to assess progress and refine strategies**
Key adjustments (if needed)	***Ex:*** Update customer segmentation criteria based on engagement rates


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