

Brand vs Performance Marketing Integration Toolkit



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1. Integration Readiness Checklist

Organizational Alignment

- ☐ Leadership buy-in secured for integrated approach
- ☐ Shared KPIs defined between brand and performance teams
- ☐ Cross-functional team structure established
- ☐ Regular sync meetings scheduled (weekly/bi-weekly)
- ☐ Unified reporting dashboard implemented
- ☐ Conflict resolution process defined

Data & Measurement Infrastructure

- ☐ Attribution modeling framework in place
- ☐ Brand lift measurement capabilities established
- ☐ Performance tracking tools integrated across channels
- ☐ Customer journey mapping completed
- ☐ Data sharing agreements between teams finalized
- ☐ Incrementality testing methodology defined
- ☐ Baseline metrics documented for both brand and performance

Creative & Messaging

- ☐ Brand guidelines accessible to performance team
- ☐ Performance insights feeding into brand creative
- ☐ Modular creative framework developed
- ☐ A/B testing protocols established
- ☐ Asset library organized and shared
- ☐ Tone of voice guidelines agreed upon
- ☐ Visual identity consistency checked across channels

Channel Strategy

- ☐ Channel mix analysis completed
- ☐ Funnel stage mapping done for each channel
- ☐ Cross-channel messaging strategy documented
- ☐ Budget flexibility mechanisms established
- ☐ Media plan integrated across brand and performance
- ☐ Retargeting strategy aligned with brand campaigns

Technology & Tools

- ☐ Marketing automation platform configured
- ☐ CRM integration completed
- ☐ Analytics tools synchronized
- ☐ Creative management platform implemented
- ☐ Budget management system accessible to both teams
- ☐ Collaboration tools deployed

Skills & Capabilities

- ☐ Team training on integrated marketing principles completed
- ☐ Performance team understands brand metrics
- ☐ Brand team understands performance optimization
- ☐ External agency partners aligned on approach
- ☐ Knowledge sharing sessions scheduled

2. Budget Allocation Calculator

Initial Budget Input

Total Marketing Budget: \$_____

Current Allocation Assessment

Category	Current €	Current %	Notes
Brand Building			
Performance Marketing			
Total		100	

Recommended Framework by Business Stage
Startup/Early Stage (0-2 years)

Performance: 70-80%

Brand: 20-30%

Focus: Customer acquisition, product-market fit

Growth Stage (2-5 years)

Performance: 60-65%

Brand: 35-40%

Focus: Scaling efficiently, building awareness

Mature Stage (5+ years)

Performance: 50-55%

Brand: 45-50%

Focus: Market leadership, brand equity

Channel	Allocation €	Allocation %	Primary Goal
TV / Video (Awareness)			
Sponsorships			
PR / Earned Media			
Brand Content			
Out-of-Home			
Brand Social Media			
Subtotal			

Performance Marketing Channels

Channel	Allocation €	Allocation %	Primary Goal
Paid Search			
Paid Social (Direct Response)			
Display / Programmatic			
Affiliate Marketing			
Email Marketing			
Conversion Rate Optimization			
Subtotal			

Integrated Campaign Reserve

Item	Allocation €	Allocation %
Integrated Campaign Fund		10 - 15
Testing and Experimentation		5 - 10
Total Reserved		

Increase Performance Budget When:

- ## Increase Brand Budget When:

- ## Monthly Review Metrics



3. Integrated Campaign Brief Template

Campaign Overview

Campaign Name: _____

Campaign Period: _____ to _____

Campaign Owner: _____

Key Stakeholders:

- Brand Lead: _____
- Performance Lead: _____
- Creative Lead: _____
- Analytics Lead: _____

Business Objectives

Primary Business Goal:

Success Metrics:

1.

2.

3.

Target Budget: \$_____

Dual Objectives Framework

Brand Objectives:

- Awareness Target: _____
- Consideration Target: _____
- Brand Lift Goal: _____
- Aided/Unaided Recall: _____

Performance Objectives:

- Lead/Sales Target: _____
- Target CAC: _____
- Target ROAS: _____
- Conversion Rate Goal: _____

Target Audience

Primary Audience:

- Demographics: _____
- Psychographics: _____
- Current Awareness Level: _____
- Funnel Stage: _____

Secondary Audience:

- Demographics: _____
- Psychographics: _____
- Current Awareness Level: _____
- Funnel Stage: _____

Campaign Strategy

Core Insight:

Big Idea:

Key Message:

Proof Points:

1.
2.
3.

Call-to-Action:

- Brand CTA: _____
- Performance CTA: _____

Channel Strategy

Channel	Role	Budget %	Brand / Perf	Key Metrics



Creative Requirements

Brand Creative Elements:

Visual Identity: _____

Tone: _____

Long-form Assets: _____

Brand Story: _____

Performance Creative Elements:

Variations Needed: _____

Testing Variables: _____

Conversion-focused Assets: _____

Landing Page Requirements: _____

Integration Points:

Consistent visual elements: _____

Message thread: _____

Sequential storytelling approach: _____

Customer Journey Map

Awareness Stage:

Touchpoints: _____

Content: _____

Goal: _____

Consideration Stage:

Touchpoints: _____

Content: _____

Goal: _____

Conversion Stage:

Touchpoints: _____
Content: _____
Goal: _____

Loyalty Stage:

Touchpoints: _____
Content: _____
Goal: _____

Measurement Framework

Brand Metrics:

Metric	Baseline	Target	Measurement Method
Brand Awareness			
Brand Consideration			
Message Association			
Brand Sentiment			

Performance Metrics:

Metric	Baseline	Target	Measurement Method
Impressions			
Clicks			
Conversions			
CAC			
ROAS			

Integrated Metrics:

Metric	Baseline	Target	Measurement Method
Assisten Conversions			
View-through Conversions			
Cross-channel Attribution			
Incrementality			

Timeline & Milestones

Date	Milestone	Owner	Status
	Creative Brief Complete		
	Assets in Development		
	Testing Phase		
	Campaign Launch		
	Mid-campaign Review		
	Campaign End		
	Post-campaign Analysis		

Budget Allocation

Line Item	Amount	% of Total
Media (Brand)		
Media (Performance)		
Creative Production		
Technology/Tools		
Research/Measurement		
Agency Fees		
Contingency		
Total		

Potential Risks:

- 1.
- 2.
- 3.

Mitigation Strategies:

- 1.
- 2.
- 3.

Learning Agenda

Key Questions to Answer:

- 1.
- 2.
- 3.

Testing Plan:

What we'll test: _____

How we'll test: _____

Success criteria: _____

Approval Sign-off

Brand Marketing: _____ Date: _____

Performance Marketing: _____ Date: _____

Finance: _____ Date: _____

Executive Sponsor: _____ Date: _____

Notes

Notes



Now go work on it!

In case you're still unsure what to do and need some help, no worries.

Just contact C-Mimmi-O!



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