

Pre-Event Planning:

Turning Historical Data
into Predictive Demand





CRM Managers, Digital Marketers, Growth Leads, picture this. **Your campaigns are live, your automations are flowing, and your audience is already in motion.**

You've built the engine - **Welcome journeys, Reactivations, Win Backs, Loyalty loops, and monthly planners** all running smoothly, keeping your ecosystem alive and engaging.

This playbook isn't here to replace any of that. It's the spark before the spotlight, **a 30 day anticipation engine** that draws from last year's data and your own audience signals. Its purpose is simple yet powerful to warm up the right crowd, plant brand intent, and set the stage for conversion before the event even begins.

Why Run This, When Automation Already Exists



Foresight Gap:

Automation reacts to events; it doesn't predict them. This layer reads history to forecast intent pockets.



Cohort Precision:

Lifecycle journeys engage based on behaviour targeting those who will be ready to buy soon.



ROI Optimization:

Paid media spends (Meta/Google) perform better when CRM-nurtured look-alikes are primed with consistent storytelling.

Run this only when

- The event is a high-value trigger period (EOSS, Diwali, Anniversary Sale, Valentine Week).
- You can access at least one year of transactional history.

**3-step
Game Plan:
Analyse,
Anticipate,
Activate**

Phase	Core Question	Objective	Example Metric
Analyse	“Where did my event demand come from last year?”	Identify high-value segments & categories	% Revenue by segment
Anticipate	“Who will likely respond again this year?”	Build audience clusters & look-alikes	RFM-based readiness index
Activate	“How do I prime them before the sale starts?”	Sync CRM + Ads + Loyalty communications	Pre-event engagement rate

Step 1 - Analyse: Learn from the Last Event

Segment	Customers	Revenue %	Avg. Ticket (₹)	Typical Behaviour
New (2024 Event)	4,200	28 %	1,900	Discount driven
Active (Loyal)	5,000	44 %	3,400	Early adopters
Reactivated	2,100	18 %	2,600	Returned for festival offers
Lost / Inactive	3,700	10 %	1,700	Low-margin, impulse buyers

Insights in Action:

- Identify who drove profitability, not just volume.
- Detect category pull (e.g., ethnic wear vs. footwear in Diwali).
- Map geographic variance if the brand has regional stores.

Step 2 - Anticipate: Build the Audience Engine

Your CRM data is your signal source. **Combine it with ad platforms to reach the next layer of “look-alike intent.”**

Data Field	Use Case	Platform Integration
RFM Segments	Prioritise loyalty tiers for teaser mailers.	CRM / WhatsApp
Last Purchase Category	Map category themes to creative.	Meta Product Sets
Avg. Spend	Decide incentive tiers.	CRM / Wallet
Store / City	Localize campaign bursts.	Google Geo Ads
Last Purchase Month	Predict readiness windows.	Look-alike seed audience

InsightX logic can auto-score event readiness → customers active 30-90 days before the last event = High Readiness Cohort.

Step 3 - Activate: The 15-Day Countdown Plan

Day	Objective	Campaign Type	Channel
-15	Announce Theme	Brand teaser	Email + Push
-10	Prime Intent	Wishlist / early access	WhatsApp
-7	Reinforce Urgency	“Members get early entry”	CRM + Meta
-3	Incentivise Warm Audience	Wallet preload / points	SMS + Push
0 (Event Start)	Convert	Site-wide activation	All Channels

Goal: Enter event week with $\geq 20\%$ of target base “warm” visited site, clicked CRM message, or added to wishlist.

Theme Architecture: One Story, Many Channels

In Indian retail, brand recall compounds when a **single narrative runs across all customer touchpoints**. Your pre-event theme is not a tagline, **it's a storyline bridge from recall to intent**.

Component	What It Defines	Example
Theme Essence	Emotion + Occasion	“The Festive Edit” – joyful renewal
Visual Cue	Colour + Design memory	Gold & coral palette from last Diwali
CRM Messaging Hook	Personal tone	“Your Festive Edit awaits.”
Ad Alignment	Digital mirror of CRM tone	Meta carousel: Curate Your Edit.

Principle: If Post-Event is your sequel, Pre-Event is your trailer. Both share the same cinematic universe.

Psychology of Anticipation

Cognitive Bias	Description	Campaign Use
Priming Effect	Early exposure shapes future response.	Run teasers 10–15 days ahead
Temporal Landmarks	Customers act around symbolic dates (e.g., “new season”)	Frame events as milestones
FOMO	Fear of missing collective moments	“Members shop 24 hours earlier”

These biases make anticipation campaigns **more efficient than generic promotions.**

**Budget
Philosophy:
Warm the
Base, Not
Burn Spend**

Channel	Recommended Share	Rationale
CRM (Push / WhatsApp / Email)	40 %	Cheapest conversion; builds readiness
Meta Custom + Look-Alike Ads	35 %	Expands audience using CRM seed
Google Discover / YouTube	15 %	Awareness for thematic storytelling
Loyalty / Wallet Incentives	10 %	Behavioural trigger pre-event

Metrics & Learning Loop

Metric	Target	Meaning
Pre-Event Readiness Index	≥ 0.6	% Of base showing engagement pre-launch
Projected Uplift %	15–25 %	Expected incremental sales vs. control
Thematic Recall Score	+10 pts vs. last event	Brand memory continuity
Cost per Warm Lead (₹)	$\leq ₹ 15$	Efficiency of pre-event layer

These metrics feed into **Post-Event analysis** to measure **how anticipation quality impacted conversion velocity**.

Summary Matrix

Cohort	Strategy	Incentive / Hook	Duration	Goal
Active	Early Access / Sneak Peek	Loyalty tier priority	15 days	Strengthen advocacy
Reactivated	Pre-load Wallet / Points	“You’re invited back”	10 days	Prevent relapse
New / Prospects	Look-alike + Wishlist	FOMO teaser	10 days	Build intent

Insight in One Line

Automation keeps the machine running; anticipation builds momentum. A pre-event overlay turns historical data into forward-looking demand warming your base, priming your ads, and amplifying ROI before the first discount drops.



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