

Marketing Plan Checklist



Creating a Marketing Plan

You'd be surprised how many large brands rely on institutional memory and copying past behaviors for their marketing planning. (It has surprised us, too!) Everyone knows better, but reality strikes as teams change, management overturns, and the historical knowledge gets lost or patchworked together over time.

We've gone down this road a few times before with our clients, so we pulled together a handy reference tool for creating a marketing plan. This document has specific steps to gather key information about your brand, and your business plan. We've divided those steps into general categories, so that the information can be tackled in chunks:

- Who is Your Customer?
- Why Choose Your Brand?
- Making the Sale
- Reaching Your Customer
- Growing Your Sales

If you don't have a formal marketing plan in place, our best advice is to go through the document in two or three passes, recording your "gut reactions" the first time, and refining the information with each successive round of review.

As you follow the steps, it is also helpful to record your programs on a calendar. This will give you a good picture of how and when you are spending your marketing budget over the course of a typical year.

If you already have a plan in place, then this tool may serve as a starting point for an audit of your current activity, which can help you make adjustments and refine your marketing efforts.

If you have questions or comments, I'd love to hear from you.



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Checklist : Marketing Plan Checklist : Who is Your Customer?

1. Define Your Target Market

• Demographic Profile of Target Customers

- Gender
- Age
- Generation (e.g., Baby-Boomers, Generation X)
- Income
- Marital Status
- Household Size
- Location
- Occupation/Employment Status
- Industry (if B2B)
- Education
- Nationality/Ethnicity
- Language
- Religion
- Organizational Memberships
- Other key demographics?

• Psychographic Profile of Target Customers

Think about the frame of mind of your ideal customer.

What things do they care strongly about? (*family, friends, politics*)

What do they do for fun? (*competitive sports, travel overseas*)

What TV shows or movies do they watch? (*Public Television, Reality Shows*)

Are there things that just don't interest them at all? (*hunting, shopping*)

Be sure to list:

- Activities
- Interests
- Opinions
- Attitudes
- Values

2. Unique Selling Proposition (USP)

- **Differentiation**

What are the ways your brand stands out from the competition? What stories are uniquely yours? (Beyond pricing, be sure to include items such as lead time, results, exclusivity, safety, product construction, customized options, location, etc.)

- **Key Values**

List any and all values and/or benefits that your products and/or services bring to your customers.

- **Customer Response**

How will customers feel after consuming your product or service?

(e.g., their breath will be fresher, they will get there on time, they will feel more confident, they will be less frustrated, they will have more money, etc.)

- **Customer Perception**

How would you like customers to think about your business?

Example: as being a trusted company, as being the most affordable choice, etc.

Examples: WalMart has low prices; Mercedes means luxury; Apple is cool

- **Brand Attributes (Brand Experience)**

Different from what your product brings to your customer, this section is describing what your customer experiences through using your brand. Briefly summarize these key attributes of your product/service through the eyes of your customer:

- **Form** Generally describe the style of your product/service.
(*smooth, modern, sexy*)
- **Function** Describe how your product/service works for your client.
(*fast, convenient, secure*)
- **Benefits** How does your product add to your customer's experience?
(*new opportunity, on my side, empowering*)
- **Feelings** After using your product, how does your customer feel?
(*safe, confident, I'm an insider*)
- **Values** What does your product represent to your customer?
(*smart shopper, quality experience, easy to use*)
- **Metaphors** Challenges, life events, lessons, aspirations connected to your product/service.
(*building a comfortable nest, providing a haven for family, connecting to family more*)
- **Extensions** Describe unexpected or illogical feelings your product/service inspires.
(*because I feel safe I can take more risks, because this is cool looking, it is fun to use*)

- **SWOT Profile**

How does your brand compare to the rest of the market?

- **Strengths**
- **Weaknesses**
- **Opportunities**
- **Threats**

Checklist : Marketing Plan Checklist : Making the Sale

3. Distribution Plan

- **Direct Distribution Methods Used**

Products are distributed to customers via retail location(s), online sales, direct mail, etc.

- **Indirect Distribution Methods Used**

Products are distributed to customers via distributors, other retailers, partners, etc.

4. Pricing and Positioning Strategy

- What prices do you charge for each of your products and/or services?
- How do these prices compare to your key competitors?

5. Offers & Incentives

- Free Offers, Free Trials
- Guarantee Offers
- Packaged Offers
- Discount Offers
- Premium Offers
- Contests
- Motivation to Act Now

6. Increasing the Take

List the tactics used to increase revenue on each sale, or over the life of the customer relationship.

- Increase the Order Size
- Product Packages
- Up-Sell and Cross-Sell Opportunities
- Continuity Programs
- Price Increases

Checklist : Marketing Plan Checklist : Growing Your Sales

7. Customer Retention

How do you keep your customers coming back?

- Ongoing Communications
- Loyalty Programs
- Continuity Programs

8. Joint Ventures & Referrals

- **Pre-Sale Relationships**

Are there non-competitive companies products/services that prospective customers buy BEFORE buying your products/services?

Think of companies that may help promote your products/services.

- **Concurrent Relationships**

Are there non-competitive companies products/services that prospective customers buy AT OR NEAR THE SAME TIME AS or BOTH BEFORE & AFTER buying your products/services?

These companies may promote your products/services and vice-versa.

- **Post-Sale Relationships**

Are there non-competitive companies products or services that your prospective customers buy AFTER buying your products/services?

These companies' products/services may offer a way for you to generate more revenue.

- **Partnership Terms**

What are your terms for each partnership?

Example: 10% referral fee for all sales made by partners.

Checklist : Marketing Plan Checklist : Reaching Your Customer

9. Traditional Marketing Materials

- Logo, Business Cards, Stationary, Signage
- Gift Certificates
- Employee Shirts / Uniforms
- Brochures / Flyers
- Catalogs
- Packaging
- Shopper Marketing
- Print Advertisements
- Yellow Pages / Directories
- Promotional Giveaways (pens, t-shirts, note pads, etc.)

10. Promotions and Programs

List all the ways you promote your brand. Include any programs offered by channel partners, vendors, or distributors.

- Coupons / Value-Packs / Door Hangers / Flyers
- Direct Mail / Postcards / Email Marketing
- Radio Ads / TV Ads / Infomercials / Voice Broadcasts
- Newspaper / Magazine / Journal Ads
- Banners / Billboards
- Telemarketing
- Trade Shows / Event Marketing
- Word of Mouth / Viral Marketing
- Networking Events

11. Digital Marketing / Social Media

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| <ul style="list-style-type: none">• Keyword / SEO Strategy• Content (blogs, podcasts, etc.)• Links (incoming)• Site Structure (page descriptions and tags) | <ul style="list-style-type: none">• Social Media• Facebook• Twitter• YouTube• LinkedIn | <ul style="list-style-type: none">• Paid Online Advertising• Pay Per Click (PPC)• Pay Per Impression (PPM)• Pay Per Action (PPA) |
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12. Content Marketing

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| <ul style="list-style-type: none">• Case Studies• Customer Testimonials• Newsletters• Seminars / Teleseminars / Webinars | <ul style="list-style-type: none">• Press Releases• Published Articles, Reprints• Speaking Opportunities• Public Relations |
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Why : Water Street Design

Water Street Design
is a creative firm
uniquely positioned
to serve the
marketing needs of
manufacturers.

We are not “one size fits all.” We know what we are good at, and we are sticking to it. We specialize in providing channel marketing for manufacturers of brands, large and small, regional and national.

We help our clients bring their products to sale, through retail and distribution channels, with clear, consistent messaging that confidently represents your brand identity.

A strong identity and an effective tag line are great tools to have in your marketing bag, but we know it takes more than just good design to get your products into the hands of your customers.

Before a customer can stand in the store reaching for your product, you have to get space on that shelf. We can help you when it's time to pitch your product, package, price and program to the merchant.

We also understand the challenges facing a sales team that is more often than not selling your products to another seller. We can help you develop training tools for store associates, and communication tools for partner calls with distributors.

In the end, what we bring to the table are thoughtful solutions, inventive designs and the tools you need to be successful.

We've done it before, and we can do it for you.



Marketing Programs • In-store Merchandising
Package Design • Catalogs • Associate Training
Retail, Distribution & Sales Team Tools



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