

MARKETING PLANNING CHECKLIST

THE BASICS TO MORE EFFECTIVE MARKETING

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1, IDENTIFY YOUR TARGET AUDIENCE

The first stage of planning is deciding on the right customers for your products or services. Ideally this segment needs to be '**substantial**' - as in their being enough volume or value, to make pursuing them worthwhile. They need to have the right '**profile**' so they should have a need for what you provide. You should be **solving a problem** for them. They need to be able to **afford** your products. They need to be easily **accessible**, so you can reach them easily with your marketing, and service them properly after they come on board.



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2, RESEARCH YOUR COMPETITORS?



Knowing who your main competitors are, is useful in the planning process, as you can track how they are marketing to their customers, look at their pricing and service levels, and the main channels they successfully use to attract new clients. You can often ascertain the level of budget they are using for marketing and benchmark your own progress against theirs.

- ✓ **Who are your top 3 competitors?**
- ✓ **On which products/ services are they better?**
- ✓ **How do they compare on price?**
- ✓ **Is their branding/ messaging superior?**
- ✓ **What lessons can you learn from their marketing approach?**

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3, PRIORITISING PRODUCTS & SERVICES



Periodically reviewing your products and services and prioritising those to promote is a good idea to maximise marketing budgets and get maximum ROI.

This process includes looking at products or services internally, but also looking at the external market and deciding on what is likely to have the most effect.

- ✓ **Make a list of top 5 -10 services/ products you will focus your 12-month marketing upon**
- ✓ **Review the pricing, branding and positioning, do you have a strong proposition?**
- ✓ **Decide of the weighting of each category, to allocate appropriate effort and resources**
- ✓ **Decide on Marketing Tools you will deploy to communicate the offer**
- ✓ **Budget for activity and set sales targets at 3m, 6m, 12m, review performance over targets**

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4, BRAND TO WIN



Being honest, is your brand as good as it can be? Does your corporate identity stack up against your competitors? Does your messaging accurately convey your current capabilities, products and services?

If things have lapsed over time and your brand needs a refresh, it's a good idea to review logos, colours, strapline, website, brochures and stationery.

- ✓ **Collect together your branded items for a visual audit, including prints of website and digital media (include your team)**
- ✓ **Decide on priority of items that require a brand or content refresh**
- ✓ **Write briefs for your requirements and pass to designer, freelancer, or agency**
- ✓ **Set a roll-out schedule for the new branding, and use as an opportunity to promote business**

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5, MARKETING TOOLS



Marketing tools are simply the methods you employ to market and sell your offer to your customers.

Decision of which marketing tools to use is based on factors such as affordability, i.e. TV/ radio/ mainstream press will not be an option if budget is limited.

B2B businesses will often choose methods such as; Email Marketing, Website SEO, Pay-Per-Click, Telemarketing, Direct Mail, Exhibitions, Social Media

- ✓ **From points 1-4 above, decide on the main marketing tools you believe will reach your target audience**
- ✓ **Decide on responsibilities and action points for implementation**
- ✓ **Set a schedule of roll-out with KPI measurement at regular intervals**
- ✓ **Review effectiveness, ROI achieved over cost of activity, test & stop if not working**

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5, SETTING A BUDGET



Once you have a list of the marketing activities you want to use, you can start to assign budgets to the tasks. Remember to factor in staff time and if there needs to be additional skill areas covered, you may have to buy in.

Budget is a combination of what is affordable for the business, and not representing too much risk. But this should be balanced with putting in a realistic budget to make enough impact to reach the target audience and affect the desired outcome.

- ✓ **From your marketing tool selection, get quotations and best estimates of costs**
- ✓ **Factor in subscriptions, i.e. regular monthly costs for memberships, software, hosting, domains**
- ✓ **Decide on duration of budget period**
- ✓ **Assign the above points to each category/product area**
- ✓ **From totals, ensure this is realistic and affordable against risk**

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