

95-Point Quick-start Marketing checklist

You are an expert at what you do, but it takes more than a great product or service to make a successful business. You need great marketing, but it can be a bit daunting to figure out where to start and what you really do need. That's why I've come up with this easy to use checklist. Across many different types of marketing you'll see what you should have in place depending on whether you consider yourself a beginner or intermediate, and you'll even get a glimpse at what the really advanced marketers are doing.

Throughout the checklist you will see links, which take you to web pages that explain more about the topic to which the link is referring.

Market research

In this section you will see what you need to be doing or need to have done to be on top of what is happening in your industry and with your target market. Check off the points you have done or know the answers to. If there is a point you don't know or understand highlight it and investigate.

Beginner

- I know EXACTLY who my target market is.
- I can name my competitors.
- I have compared my pricing to theirs.
- I'm on my competitors' mailing list and email list.
- I know the number of potential customers for my service in my target area.
- I know what the dollar value of the maximum amount of product or service is that I can deliver.
- I have subscribed to marketing and industry information, in the form of email newsletters, print publications or news alerts to stay informed in my industry and in marketing in general.

Intermediate

- Now that I'm on my competitors mailing list, I'm keeping track of how often my competitors promote to me.
- I know the demographics of my ideal customer.
- I have listed out what differentiates me from my competitors. I know what I actually offer better than my competition and have honestly named what my competition handles better than I do.

Advanced

- o I've purchased demographic studies <http://www.geolytics.com/> and maps of my target areas to research possible missed markets.
- o I've had my database of past customers fully analyzed by an outside source, to find commonalities in my customers that may not be obvious from anecdotal data.

Direct Mail

If you have any boxes unchecked in this section check out <http://www.Agentsdirectmail.com> or give us a call at 1-708-357-2500 and we'll make it simple for you to get them checked off!

Beginner

- o I have read at least "Marketing Overkill? — The Undeniable Role of Repetition in Success"
- o I have read Joy's book "The Ultimate Postcard Marketing Success Manual"
- o I have read and understood the Estimation of Effort formula so I have an idea of how many postcards I need to send to get the response I desire.
- o I have run a mailing list count of my target market.
- o My direct mail piece has all necessary design points.
- o A clear, bold headline.
- o A graphic that supports the message.
- o Color that pops.
- o Subheads that lead into text.
- o Benefits, benefits, benefits. One of the biggest errors people make in advertising is stating features, rather than benefits. For example, never assume recipients know what benefit can be derived from a lower interest rate on their mortgage. Let them know that their monthly payments will go down.
- o A compelling offer.
- o Your company name and logo.
- o Call to action.
- o Contact information.
- o Return address.
- o I have scheduled my direct mail campaign.
- o I have prepared my receptionists and sales people to receive calls.
- o I make sure to remove the returned mail pieces I get from my lists so not to waste postage.

Intermediate

- o I have setup a campaign to continually send direct mail pieces to prospects and customers.
- o I have run test mailings, and made decisions about future campaigns based on the findings.
- o I know how to get the best postage rates.

Advanced

- o I time my direct mail campaigns to correspond with emails and other types of marketing that I am doing.

Website/Landing Pages

Beginner

- o I have a website
- o All of the information on my website is current and accurate
- o My website has the following:
- o A good website address – one that is easy to remember OR is the name of my company if that is available.
- o A call to action on every page
- o A home page that directs visitors exactly where to go
- o A place to collect names and contact information with a compelling offer
- o Prominent contact information
- o A professional design
- o An easy to navigate menu
- o An About Us page with Staff Pictures
- o Testimonials from happy customers
- o Photos that support the message I am trying to convey
- o An FAQ (Frequently Asked Questions) page if needed
- o A Products/Services page which delineates the benefits of each product or service I offer.
- o Details on any press or awards our company has
- o A contact us page
- o I have gone through my website from the perspective of a potential customer and ensured that the website is designed to get me to do the action that I want my visitors to take. (This can also be done by someone who has never been to your site, sit next to them and see where they go and what they click on).
- o I have signed up for free local search listings, if you have a local business.

Intermediate

- o My website copy is optimized so that search engines will find my site and rank it high up on the page.
- o I have video on my site, promoting my product or service.
- o I have a blog. (Blog is a combination of the words “web” and “log” meaning that you make regular entries to a specific page.)
- o My website has educational articles and information on it. Content heavy.

Advanced

- o My site has a user login area that allows me to track what users do.
- o I am using an RSS Feed that pushes content to any users who have signed up to receive it.
- o My blog is updated at least once a week, with search engine friendly posts about timely topics.
- o I use Pay-Per-Click marketing, through Google or another provider.

Email Marketing

Beginner

- I understand how often I should email based on the appropriateness of my subject matter.
- I have setup a system to collect email addresses through my website and over phone.
- I have signed up with an email marketing service, such as Constant Contact or iContact.
- I have created a newsletter template which I will update each time I send my newsletter.
- I track responses to my email marketing.

Intermediate

- I have tested and determined the best day of the week to send my emails on based on open and click through rates.
- I know how to “split test” two different subject lines.
- I am tracking click through rates, opt out rates and open rates.

Advanced

- I use “event triggered” email campaigns that automatically send emails based on actions taken by people on my website or in my database of customers and prospects.

Social Networking

Social Networking is a hybrid of Marketing and Public Relations and should be pursued after basic marketing campaigns have been set up.

Beginning

- I have created accounts on LinkedIn and Facebook.
- I have heard of Twitter, blogger, wordpress or other smaller networking sites.
- I have read and understood “The New Rules of Marketing and PR” by David Meerman

Scott.

Intermediate

- I have an account on Twitter and am building followers.
- I regularly update my profiles on the different networking sites where I am a member.

Advanced

- I am sending regular messages to my Twitter followers promoting aspects of my business.
- I have hired an outside firm to maintain your pages and profiles across all of the different social media networks . We recommend Richter 10.2 for this.

Targets/Budgeting

Beginning

- o I set weekly, monthly and annual leads generation targets.
- o I keep track of where I am at on these targets and take actions to ensure they are met.
- o I know how much it costs me to generate one new lead or customer based on past marketing actions.
- o I set aside a portion of the money that I make each week for marketing actions.
- o I know what the lifetime value of my average customer is so I know how much I want to spend to acquire a new one.

Intermediate

- o I have determined what percentage of my gross income I need to set aside for marketing to ensure continued growth.

Advanced

- o I have started building up the reserve to ensure that I can continue my marketing, regardless of the current economic climate.

Tracking

Beginner

- o I have a notebook or spreadsheet where I will track leads and how they heard about us
- o My sales people/receptionists have been trained to ask all prospects how they heard about us EVERY time no fail .They understand that if someone says they heard about me through our website, I will ask them how they got to our website.
- o I am tracking the total number of leads from each separate marketing avenue
- o I am tracking the total revenue from each separate marketing avenue
- o I can calculate my ROI from each marketing avenue.

Intermediate

- o I have a CRM (Customer Relationship Management) system where I keep track of how contacts heard about me.
- o I am able to pull reports from my CRM system and analyze them.
- o I am tracking number of leads from each separate direct mail piece, search term, or specific commercial.

Advanced

- o I actually pull reports from my CRM on a set schedule and making decisions based on what I find.
- o I use unique tracking phone numbers on my promo pieces so I can accurately track the number of calls generated by each.
- o I am tracking the channel through which leads are contacting us and calculating most profitable ways people contact us. This means did they call in, email, fill out a form or walk into the store.

How did you do? If you checked everything off then you are truly a Marketing Mastermind and I may want to interview you for my Monthly Mastermind Group!

It's more likely that you still have a good amount of boxes unchecked and a bit of work to do. That's good news because it means you have a lot of room to improve and really grow your company. If you have any questions on anything feel free to email us.