



MARKETING TOOLS

PHASE 1

Basic Brainstorming

Business Name:

Your Products and Services:

1)

2)

3)

4)

5)

Describe the types of individuals or businesses you expect to use these services. Include age, gender, income, and other important demographics. (establish at least 3 separate buyer personas)

Persona 1	Persona 2	Persona 3
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Indicate when and how often they might need your services. If you aren't sure, ask potential clients and/or existing customers to tell you when they would use what you sell or why they use it now. For existing businesses, also ask customers if there's anything about your products or services they'd like to see changed.

When	How	Customer Contacts: 3
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Describe the benefits your products and services will offer customers (the SPECIFIC problems the product solves or SPECIFIC advantages it offers to the customer):

Products/Services	Advantage to Product or Service

How many other services like yours are in your area? (list at least three):

1)

2)

3)

How will your service differ from your competitors? (list at least three)

1)

2)

3)

What's your primary competitive edge? What makes you different from (and better than) your competitors? (I.e., industry knowledge, years of experience, customer support, etc.)

Marketing Checklist: Intent

How are you planning to find customers ?

(Check all that apply)

- _____ Email
- _____ Social media posting
- _____ Social media advertising
- _____ Posting videos on YouTube
- _____ Ads on search engines
- _____ Banner ads or links on websites
- _____ Guest posting on websites
- _____ Using affiliates to promote your products
- _____ Search engine optimization
- _____ Text messaging
- _____ In-App advertising
- _____ Direct mail
- _____ Print Classified ads
- _____ Paid display advertising in newspapers or magazines
- _____ Radio advertising
- _____ TV advertising
- _____ Ads on side of your truck
- _____ Door-to-door canvassing
- _____ Cold-call telephone calls
- _____ An ad in the Yellow Pages
- _____ Off-line word-of-mouth advertising
- _____ Network at business meetings
- _____ Giving speeches and seminars
- _____ Window signs to attract walk-in trade
- _____ In-store displays to sell add-on services
- _____ Exhibiting at trade shows
- _____ Responding to RFPs
- _____ Getting on the GSA schedule
- _____ Other (specify)

Marketing Checklist: Current Efforts

How do people hear about this product or service now? (Don't guess! Go out and ask potential customers)

- _____ Through the mail
- _____ Through the email
- _____ Through the social networks
- _____ By watching online videos or slideshows
- _____ By using online search engines
- _____ By asking their smartphones a question
- _____ By using their smartphone "find nearby" function
- _____ Through other online ads
- _____ Through telemarketers
- _____ Through print ads they see in newspapers, shoppers or magazines
- _____ In the Yellow Pages
- _____ At trade shows_____ Through radio or TV ads
- _____ Listening to talk shows
- _____ Through contacts and networking
- _____ By listening to speakers at conferences and seminars
- _____ By attending trade shows
- _____ Through window signs to attract walk-in trade
- _____ Through In-store displays
- _____ Through a bidding process
- _____ Through the GSA schedule
- _____ Through online classified advertising
- _____ Through their diversity outreach division or website
- _____ On Internet Web sites
- _____ Through banner ads on the Internet
- _____ Other (specify)

Other Points of Consideration

Who makes the buying decisions-- a consumer, the actual business user, the purchasing department, department head, other?

How much money have you allowed for marketing?

What will it cost you to use each of these marketing methods?

- _____ Email delivery service charges
 - _____ Mailings (postage, mailing lists, printed materials, paper & toner, staff time, etc.)
 - _____ Broadcast (radio, tv) advertising costs
 - _____ In-person sales calls (include gas money)
 - _____ Staff time or cost of outsourced help for social media networking
 - _____ Video production costs
 - _____ Photography and artwork cost
 - _____ Publicity costs
 - _____ Phone calls (including staff time)
 - _____ Online advertising
 - _____ Print classified ads
 - _____ Print display ads
 - _____ Yellow Pages
 - _____ Network at business meetings (include cost of meetings, if any)
 - _____ Window signs to attract walk-in trade
 - _____ In-store displays to sell add-on services
 - _____ Bidding on jobs
 - _____ Other (specify)
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Summary Points

Compare your expected methods of finding customers and costs with the ways potential customers have indicated they are most likely to look for this type of service. Then decide what steps you need to take to get customers to buy from you. List them below and set target dates for accomplishing each.

Action Item Start Follow-up Estimated Actual Results (method, date started, estimated conversions, and overall cost)
