



TOOLS YOU CAN USE

MARKETING AUDIT

WORKBOOK



WATER STREET
Marketing for Manufacturers



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01. YOUR TEAM

In this section, we'll identify your team's mission, your internal and external clients, and the current processes you use to move projects through your department.



THE TEAM

YOUR COMPANY

CORPORATE MISSION STATEMENT

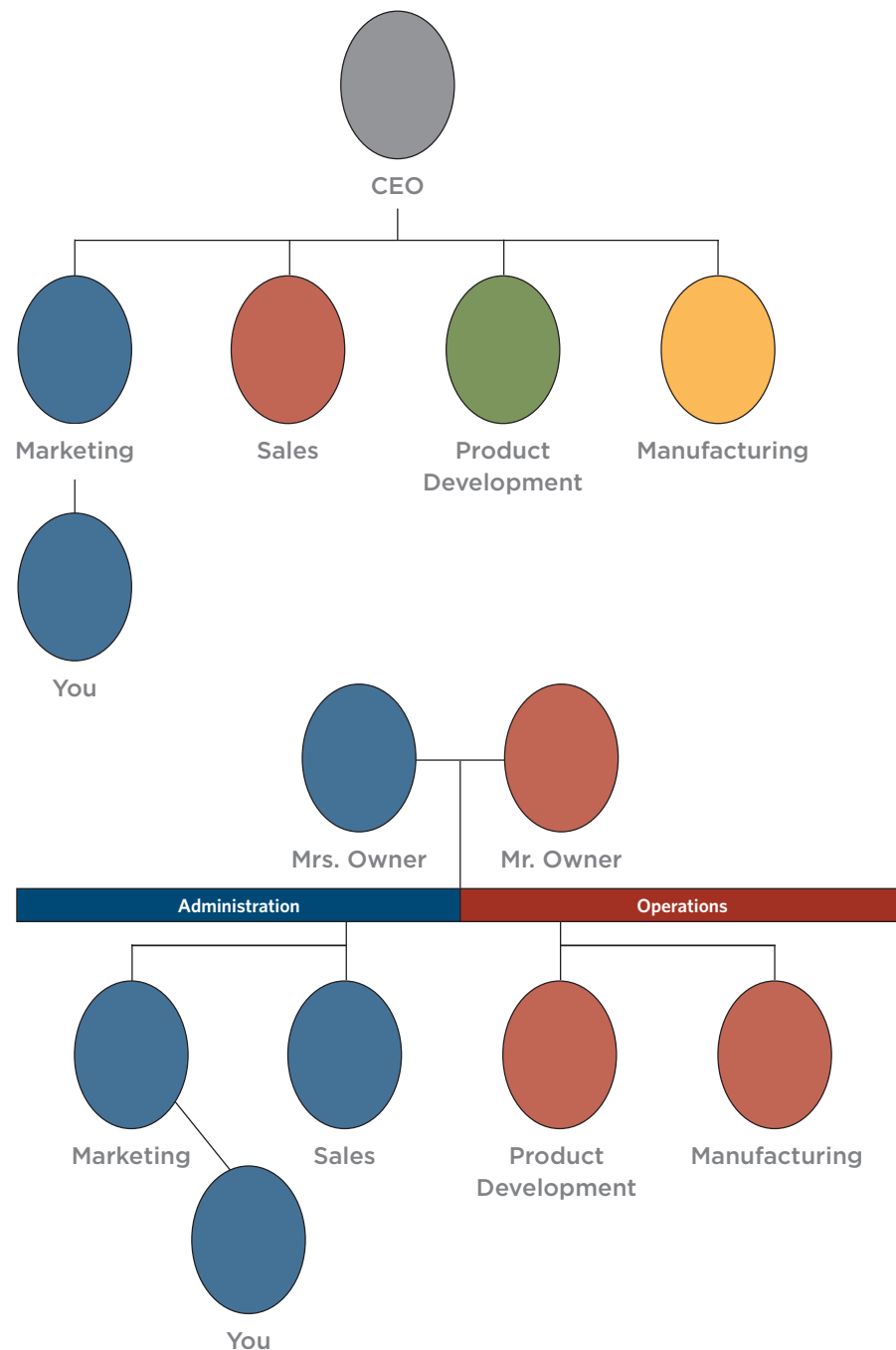
YOUR DEPARTMENT'S MISSION:

LIST YOUR CURRENT CORPORATE GOALS AND TIME FRAME FOR MEETING THEM:

WHAT'S THE ORGANIZATIONAL STRUCTURE OF YOUR COMPANY?

Where does your department fall in the management of your company? Are you part of a large corporation, with many "internal clients" (other managers or departments that can request projects from your team)? Or do you work for a small enterprise? Are you a department of one person, who gets requests from multiple managers?

The structure of your company can have dynamically different impacts on how your work processes are managed. Knowing how information flows can help you organize your workflow more efficiently.



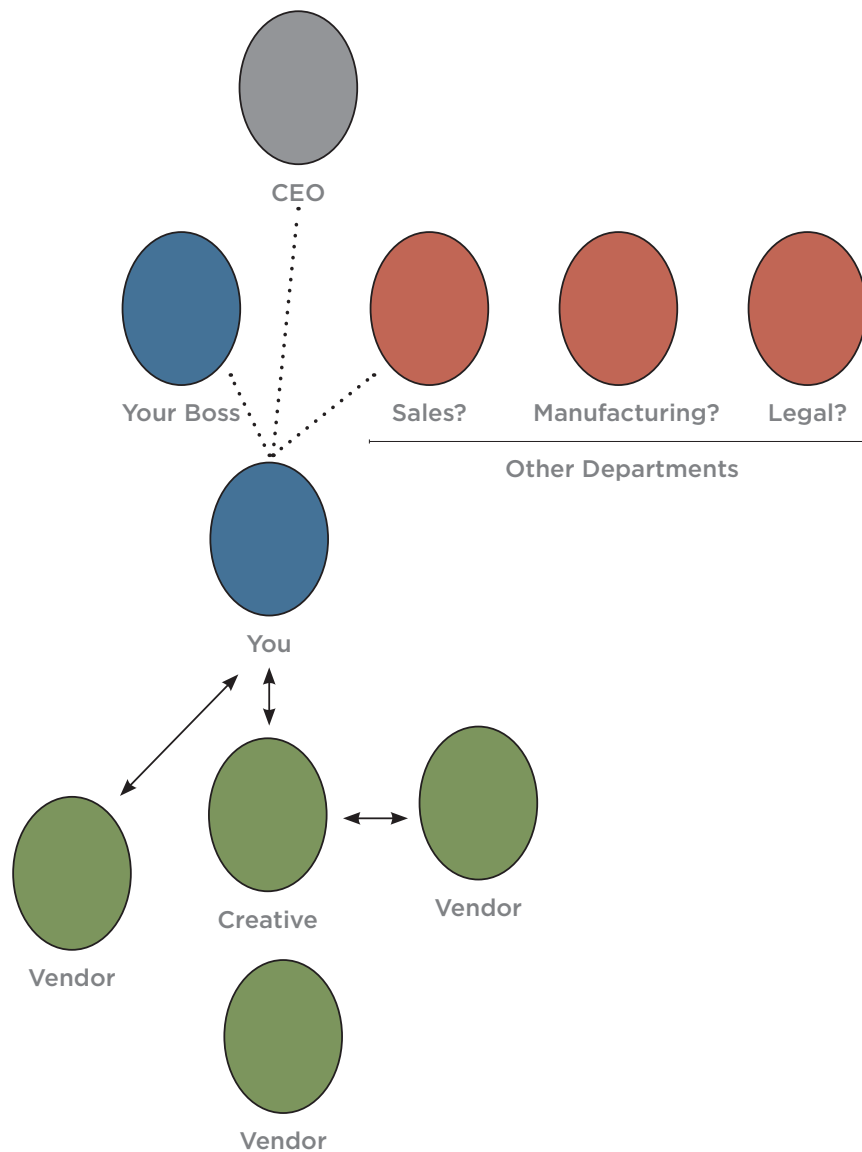
Where does your department fit in the corporate structure?

A large rectangular area filled with a light gray grid, intended for drawing an organizational chart. The grid is composed of small squares and covers most of the page's width and height.

HOW ARE MARKETING PROJECTS MANAGED AT YOUR COMPANY?

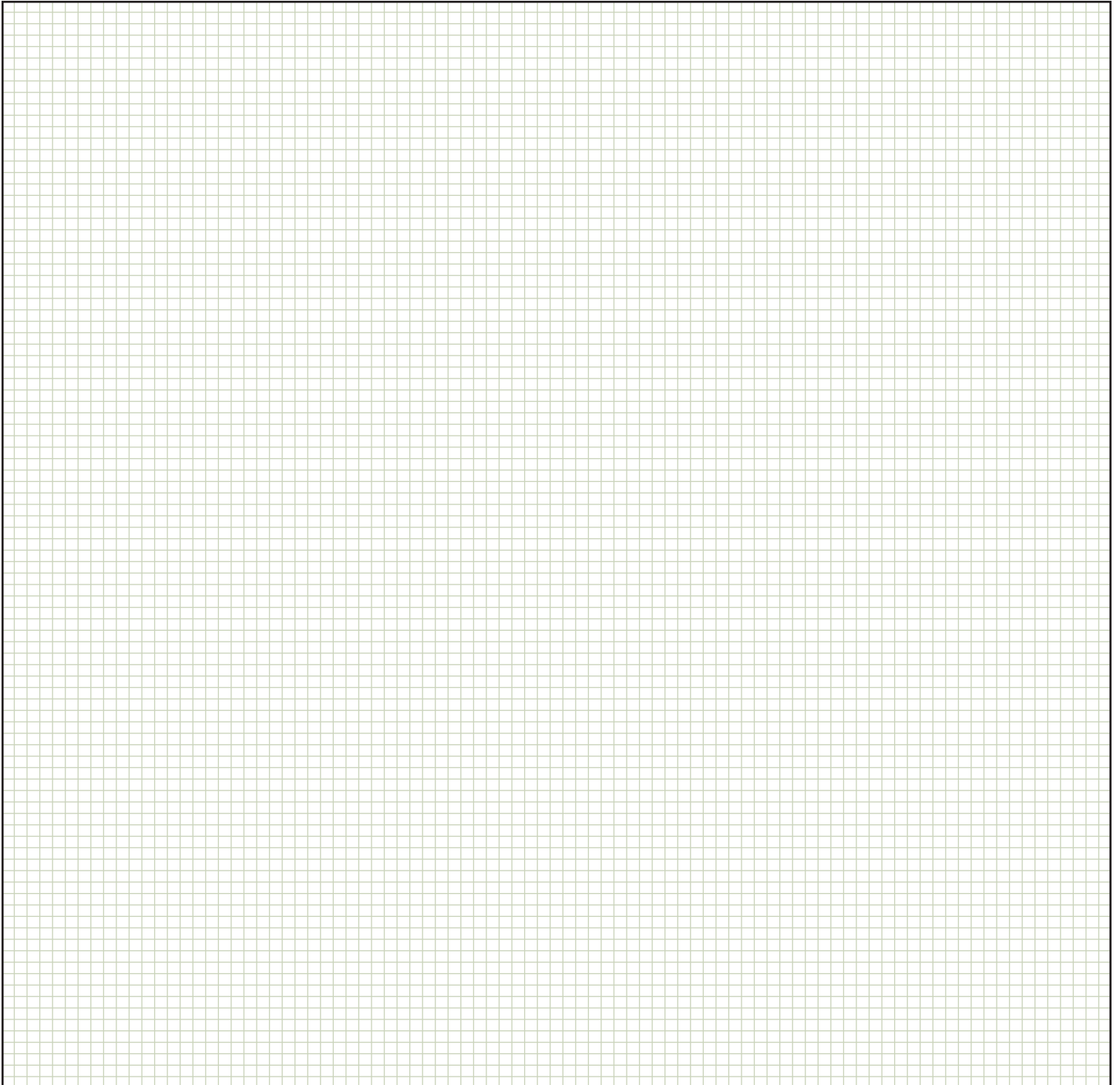
Think about the way you work within your department, as well as between departments. Who manages the communication to the various stakeholders within your company? How involved in the approval process is your CEO? Does your department communicate directly with senior leadership, or is that relationship managed by someone else?

Also look at how outside vendors are managed. Do you hire them directly, or does your creative team manage printers, photographers, and writers?



PROJECT MANAGEMENT FLOW CHART

Using the sample as a guide, draw a diagram of how projects are managed with outside vendors, and with your internal stakeholders.



THE TEAM

YOUR DEPARTMENT**DEPARTMENT HEAD:**

Make an entry below for each department team member: (Duplicate this page as necessary)

Name _____
Title: _____
Job Function: _____
Responsibilities _____

Primary Contact: _____

Name _____
Title: _____
Job Function: _____
Responsibilities _____

Primary Contact: _____

Name _____
Title: _____
Job Function: _____
Responsibilities: _____

Primary Contact _____
:

Name _____
Title: _____
Job Function: _____
Responsibilities: _____

Primary Contact: _____

YOUR YOUR INTERNAL CLIENT

DEPARTMENT HEAD:

Marketing departments execute projects for the company at large: Sales teams, Product teams, etc. The people who make these requests are your Internal Clients. For the purpose of this form, the Primary Contact is the person in your department that your internal client would call FIRST to start a project with your team. (Duplicate this page as necessary)

Internal Client Name _____
Title: _____
Job Function: _____
Services Provided: _____

Primary Contact: _____

Internal Client Name _____
Title: _____
Job Function: _____
Services Provided: _____

Primary Contact: _____

Internal Client Name _____
Title: _____
Job Function: _____
Services Provided: _____

Primary Contact: _____

Internal Client Name _____
Title: _____
Job Function: _____
Services Provided: _____

Primary Contact: _____

YOUR INTERNAL CLIENTS

HOW DOES AN INTERNAL CLIENT INITIATE A PROJECT WITH YOUR DEPARTMENT?

DESCRIBE THE PROCESS YOUR TEAM USES TO BEGIN A PROJECT:

Attach a sample of your internal brief, or start work request

HOW IS A PRODUCTION SCHEDULE CREATED AND MONITORED?

Attach a sample of your scheduling tool(s)

YOUR APPROVAL PROCESS

DESCRIBE YOUR APPROVAL PROCESS:

Attach a sample of your approval (sign-off) document(s)

WHO IN YOUR ORGANIZATION HAS FINAL CONTROL OVER THE
MARKETING MESSAGE?

AT WHAT POINT(S) ARE THEY INCLUDED IN YOUR APPROVAL
PROCESS?

WHO IN YOUR ORGANIZATION HAS FINAL CONTROL OVER BUDGET
DECISIONS?

AT WHAT POINT ARE THEY INCLUDED IN YOUR APPROVAL PROCESS?

ASSET MANAGEMENT

LIST YOUR SOURCES FOR PHOTOGRAPHY:

HOW IS AN IMAGE REQUEST GENERATED?

HOW IS PRODUCT PROVIDED FOR THE SET?

Who orders props?
Who schedules models?
Who manages the set?
Who has final approval

Annual Budget:
Previous 12 month spend
Next 12 month projection:

ATTACH YOUR SET MANAGEMENT DOCUMENT/PROCESS

ATTACH YOUR IMAGE APPROVAL FORM

ATTACH SAMPLES OF RECENT PHOTOGRAPHY PROJECTS:

- Application Shots
- Environmental Shots
- Catalog shots
- Cover shots

ASSET MANAGEMENT

WHERE ARE YOUR GRAPHIC ASSETS ARCHIVED?

WHAT TOOL DO YOU USE FOR ASSET MANAGEMENT?

WHO IN YOUR DEPARTMENT IS RESPONSIBLE FOR ASSET ARCHIVING?

DO YOU USE META DATA AND TAGS?

WHO MANAGES THE PROCESS FOR ASSIGNING TAGS?

WHO HAS DIRECT ACCESS TO YOUR ASSET LIBRARY?

HOW DO YOU SHARE ASSETS WITH OTHER DIVISIONS?

HOW DO YOU SHARE ASSETS WITH YOUR DEALERS / DISTRIBUTORS /
CHANNEL PARTNERS?

Attach a sample of your image request form or process.



02. YOUR BRAND

In this section we'll create an overview of your brand, its positioning, and a profile of your ideal customer. You'll be able to identify what's complete, and what needs to be completed. The goal of the brand definitions are to create a strong reference point to use for all your marketing campaigns going forward.



YOUR BRAND(S)

Along with this summary, provide any brand standards or guidelines for marketing your brand
Duplicate this section in total for each of the brands your company promotes.

Brand Name: _____

Positioning Statement: _____

Sold through: _____

YOUR IDEAL CUSTOMER:

General description: _____

Demographic: _____

Frame of Mind: _____

YOUR S.W.O.T. BRAND ASSESSMENT:

Strengths: _____

Weaknesses: _____

Opportunities: _____

Threats: _____

YOUR BRAND'S STANDARDS AND PRACTICES

Please provide any brand standards or practice guidelines that have been established for promoting your brand

Date of Development: _____

Last Update: _____

Prepared By: _____

HOW DO CREATIVE PARTNERS ACCESS YOUR GUIDELINES?

INCLUDE GUIDELINES FOR:

- Logo presentation
- Language and Messaging
- Photography / Illustration treatment
- Print Collateral
- Web Communication
- E-mail campaigns
- Presentations
- Video and Motion Graphics
- Partner Communications

YOUR CHANNEL PARTNERS:

Duplicate this section in total for each of the brands your company promotes

Channel Partner Name _____
Positioning Statement: _____
Territory Covered _____

WHO IS YOUR CHANNEL PARTNER'S IDEAL CUSTOMER?

General description: _____

Demographic: _____

Frame of Mind: _____

S.W.O.T BRAND ASSESSMENT FOR THIS CHANNEL:

Strengths: _____

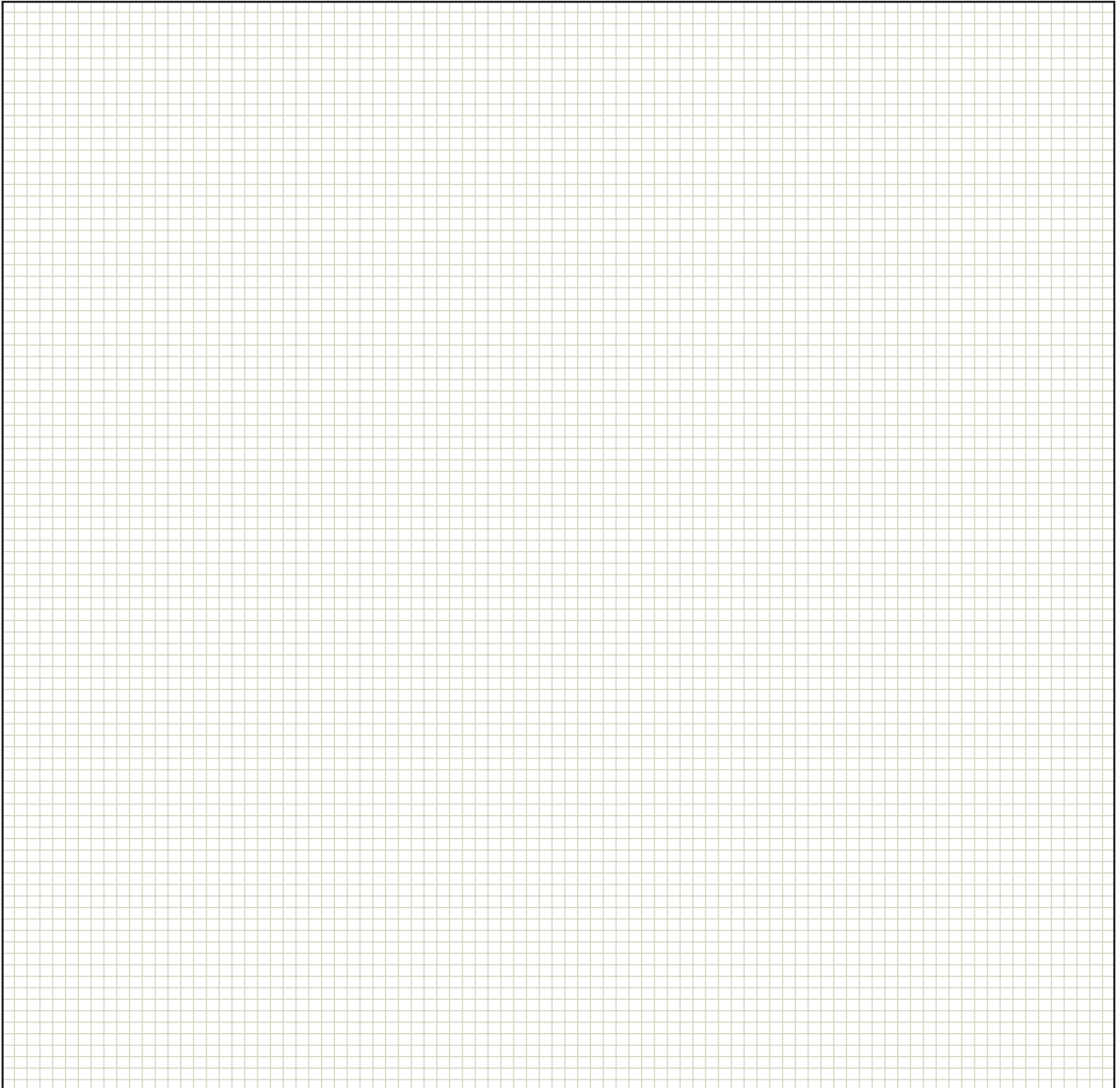
Weaknesses: _____

Opportunities: _____

Threats: _____

YOUR BRAND: THE PATH TO PURCHASE

Use this space to diagram how your products get to your customers. There is probably more than one path from awareness to closing the sale. Where do they make the purchase? Online or in a retail outlet? Where do they first find out about your brand? How does your product get on the shelf or in front of your customer?





03. YOUR BUDGET

In this section we'll take a snapshot of your yearly marketing spend. It's helpful to take a high-level view of your spending patterns from time to time. For instance, brand with a large appetite for photography may find ways to combine resources and schedule fewer, but more organized photo shoots, freeing up funds for other effective communication programs.



DEPARTMENTAL BUDGET

In this section, we'll identify the big buckets of spending, an overview of your annual budget, and how that is allocated to support your department's mission.

Fiscal Year Ends _____
Total Annual Budget _____

ARE THERE PORTIONS OF YOUR BUDGET THAT ARE CONSIDERED OVERHEAD OR BASE FUNDED?

WHAT PORTION OF YOUR BUDGET IS DERIVED DIRECTLY FROM SALES PERFORMANCE?

WHAT BASIS IS USED TO CALCULATE THAT?

DOES YOUR SALES TEAM HAVE DISCRETIONARY FUNDS TO SPEND ON TOOLS AND PROMOTIONS?

ARE THERE QUARTERLY POINTS WHEN YOUR BUDGET IS REVIEWED AND ADJUSTED BASED UPON SALES?

ARE THERE PORTIONS OF YOUR BUDGET THAT ARE DEFINED AS "USE OR LOSE"?

MARKETING CALENDAR, PREVIOUS 12 MONTHS

In this section you will create a schedule, in order of release date, of how you spent your budget on marketing collateral projects that were completed in the last year. Looking at the past year is a great way to plan for the coming year. Putting a list of all the projects you worked on will help you identify patterns, and also point out anomalies. As you make the list, be sure to include all of the communication tools that are part of your current marketing program. Here is a partial list to get you started.

PRODUCT LAUNCH

Products | Channel | Launch Date

PROMOTIONAL CAMPAIGNS

Direct Mail

Email

IN-STORE EVENTS

RETAIL SALES EVENTS

RETAIL LINE REVIEWS

CHANNEL PARTNER EVENTS

TRADE SHOWS

CORPORATE SALES TEAM MEETINGS

REGIONAL SALES TEAM MEETINGS / TRAINING

PRODUCT CATALOGS

NEW PRODUCT ANNOUNCEMENTS

PRODUCT BROCHURES

PACKAGE DESIGN

POINT OF SALE

SOCIAL MEDIA

DIGITAL ADVERTISING

PRINT ADVERTISING

WHITE PAPERS

PRESS RELEASES

THE BUDGET

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

THE BUDGET

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

MARKETING CALENDAR, NEXT 12 MONTHS

Depending upon when you begin this audit, you may or may not have the coming year's budget mapped out. Use this section to identify projects that have already been earmarked with specific funding dollars.

PRODUCT LAUNCH

Products | Channel | Launch Date

PROMOTIONAL CAMPAIGNS

Direct Mail

Email

IN-STORE EVENTS

RETAIL SALES EVENTS

RETAIL LINE REVIEWS

CHANNEL PARTNER EVENTS

TRADE SHOWS

CORPORATE SALES TEAM MEETINGS

REGIONAL SALES TEAM MEETINGS / TRAINING

PRODUCT CATALOGS

NEW PRODUCT ANNOUNCEMENTS

PRODUCT BROCHURES

PACKAGE DESIGN

POINT OF SALE

SOCIAL MEDIA

DIGITAL ADVERTISING

PRINT ADVERTISING

WHITE PAPERS

PRESS RELEASES

Vendor Name: _____

Contact Info: _____

Used for these projects: _____

Strengths: _____

Weaknesses: _____

Annual Spend: _____

Previous 12 month spend: _____

Next 12 month projection: _____

Duplicate this page as needed and complete one form for each vendor profiled.

VENDORS: PR & MEDIA PLACEMENT

Vendor Name: _____

Contact Info: _____

Used for these projects: _____

Strengths: _____

Weaknesses: _____

Annual Spend: _____

Previous 12 month spend: _____

Next 12 month projection: _____

Duplicate this page as needed and complete one form for each vendor profiled.

Vendor Name: _____

Contact Info: _____

Used for these projects: _____

Strengths: _____

Weaknesses: _____

Annual Spend: _____

Previous 12 month spend: _____

Next 12 month projection: _____

Duplicate this page as needed and complete one form for each vendor profiled.

Vendor Name: _____

Contact Info: _____

Used for these projects: _____

Strengths: _____

Weaknesses: _____

Annual Spend: _____

Previous 12 month spend: _____

Next 12 month projection: _____

Duplicate this page as needed and complete one form for each vendor profiled.

VENDORS: DISTRIBUTION & FULFILLMENT

Vendor Name: _____

Contact Info: _____

Used for these projects: _____

Strengths: _____

Weaknesses: _____

Annual Spend: _____

Previous 12 month spend: _____

Next 12 month projection: _____

Duplicate this page as needed and complete one form for each vendor profiled.



04. YOUR TOOLS

In this section, we'll gather examples of the communication tools your department produces for your company. A single example of every type of communication is useful for a review of all platforms.

Ultimately you should store the final pdf of every item you create and file them by category. Having these graphics maps as reference tools in meetings are very useful when planning campaigns.

We've provided one sample cover sheet for each type of project. Duplicate those as necessary to allow for multiple projects.



Description _____

Release Date: _____

Shelf Life _____

Used by _____

Print Quantity _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Description _____

Release Date: _____

Shelf Life _____

Used by _____

Design Costs _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Print Quantity:

Design Costs:

Print Costs:

Distribution Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Print Quantity:

Design Costs:

Print Costs:

Distribution Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Print Quantity:

Design Costs:

Print Costs:

Distribution Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Print Quantity:

Design Costs:

Print Costs:

Distribution Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Design Costs:

Distribution Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Development Costs:

Distribution Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Design Costs:

Publishing Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Design Costs:

Publishing Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided. For each platform you use, include examples of different types of communication: industry news, partner news, community news, product promotion.

Project Title:

Description:

Audience:

Publication Date:

Design Costs:

Publishing Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Design Costs:

Publishing Costs:

Distribution Method:

Life Expectancy:

Project Manager:

Project Title: _____

Description: _____

Release Date _____

Shelf Life: _____

Used by _____

Audience: _____

Quantity: _____

Design Costs: _____

Production Costs: _____

Distribution Costs: _____

Distribution Method: _____

Notes: _____

Project Title: _____

Release Date _____

Shelf Life _____

Retail Channel(s) _____

Consumer Profile _____

Quantity: _____

Design Costs: _____

Print/Production Costs: _____

Distribution Costs: _____

Distribution Method: _____

Notes: _____

LINE REVIEW MATERIALS

Duplicate this page and attach one to each sample provided.

Project Title:

Description:

Audience:

Publication Date:

Print Quantity

Design Costs:

Print Costs

Distribution Costs

Distribution Method:

Life Expectancy:

Project Manager:

Project Title: _____

Release Date: _____

Shelf Life: _____

Channel Partner(s): _____

Consumer Profile: _____

Notes: _____

Include one or two representative samples for each product line.

Project Title: _____

Description: _____

Release Date: _____

Shelf Life: _____

Used by: _____

Audience: _____

Quantity: _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Project Title: _____

Description: _____

Release Date: _____

Shelf Life: _____

Used by: _____

Audience: _____

Quantity: _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Project Title: _____

Description: _____

Release Date: _____

Shelf Life: _____

Used by: _____

Audience: _____

Quantity: _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Project Title: _____

Description: _____

Release Date: _____

Shelf Life: _____

Used by: _____

Audience: _____

Quantity: _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Project Title: _____

Description: _____

Release Date: _____

Shelf Life: _____

Used by: _____

Audience: _____

Quantity: _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Notes: _____

Event Name: _____

Event Date: _____

Audience: _____

Used by: _____

Design Costs _____

Production Costs: _____

Re-use opportunities _____

Notes: _____

Description: _____

Release Date _____

Shelf Life: _____

Used by: _____

Design Costs _____

Print/Production Costs: _____

Distribution Costs _____

Distribution Method: _____

Re-use opportunities _____

Notes: _____

Project Title _____

Release Date _____

Shelf Life: _____

Used by: _____

Distribution Method: _____

Production Costs: _____

Notes: _____

Description _____

Release Date _____

Shelf Life: _____

Used by: _____

Distribution Method: _____

Production Costs: _____

Notes: _____

Description _____

Release Date _____

Shelf Life: _____

Used by: _____

Distribution Method: _____

Production Costs: _____

Notes: _____

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

We specialize in providing channel marketing for consumer 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. When it's time to pitch your product, package, price, and program, we help channel sales stand out with retail merchants.

We understand the challenges facing a sales team that is more often than not selling your products to another seller. We 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.

**Retail, Distribution & Sales Team Tools
Digital Marketing Campaigns
Package Design • Point-of-Sale
Catalogs • Events**

