



TOOLS YOU CAN USE

MARKETING PLAN

CHECKLIST



WATER STREET
Marketing for Manufacturers

CREATING A MARKETING PLAN

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

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

WHO IS YOUR CUSTOMER?

WHY WOULD YOUR CUSTOMER CHOOSE YOUR BRAND?

REACHING YOUR CUSTOMER

MAKING THE SALE

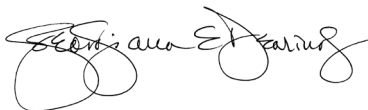
GROWING YOUR SALES

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.



George Dearing | 540-539-7947

WHO IS YOUR CUSTOMER?

01. DEFINE YOUR TARGET MARKET

DEMOGRAPHIC PROFILE OF TARGET CUSTOMERS

- Gender
- Age
- Generation
(e.g., Baby-Boomers, Gen 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

PERSONA DEVELOPMENT

Once you've gathered all of the above information, pull it together to create buying personas for each of your customers along the path from your corporation to the shelf.

Of course your end consumer is always top of mind, but their motivations will be different from dealers, distributors, retail merchants, and even your own sales team! Identifying the frame of mind of each of these audiences will help you craft effective, actionable campaign materials.

WHY CHOOSE YOUR BRAND?

02. UNIQUE SELLING PROPOSITION (USP)

DIFFERENTIATION

What are the ways your brand stands out from the competition? (Beyond pricing, be sure to include items such as innovations, authenticity, exclusivity, location, customized options, etc.)

KEY VALUES

List any values or benefits that your products bring to your customers.

Example: quality, nourishment, local support, sustainability

CUSTOMER RESPONSE

How will customers feel after consuming your products?

Example: their breath will be fresher, their meal was prepared quickly, they will be less frustrated, they will have more money, etc.

CUSTOMER PERCEPTION

How would you like customers to think about your business?

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

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

SWOT PROFILE

How does your brand compare to the rest of the market? List all of your Strengths, Weaknesses, Opportunities, and Threats.

BRAND ATTRIBUTES (BRAND EXPERIENCE)

This is different from what your product brings to your customer; this section describes 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. (creamy, luscious, crunchy, spicy)
- Function** Describe how your product works for your client. (fast, convenient, comforting, satisfying)
- Benefits** How does your product add to your customer's experience? (healthy eating in a hurry, fine dining on a budget, great meals with little planning)
- Feelings** After using your product, how does your customer feel? (healthy and smart, a trend setter, confident parent)
- Values** What does your product represent to your customer? (smart shopper, wholesome food, easy to prepare)
- Metaphors** Challenges, life events, lessons, aspirations connected to your product/service. (creating a welcoming table, providing a healthy start to the day, connecting to family)
- Extensions** Describe unexpected or illogical feelings your product/service inspires. (because I feed my family healthy food, I am a great mom; because this food is popular, I throw great parties; because I serve gorgeous food, I'm a gracious host)

03. TRADITIONAL MARKETING

- Logo, Product Name(s)
- Packaging
- Catalogs
- Brochures / Flyers
- Shopper Marketing:
 - Aisle Violators
 - End Caps
 - Coupons
 - Signage
- Advertisements
- Promotional Giveaways
(t-shirts, note pads, pens, etc.)
- Tradeshows
- Digital Imagery / Video

04. DIGITAL MARKETING

- SEO
- Social Media
- Digital Ads
- Email
- Website
- Multi-channel Strategy
- Landing Pages
- Content Development
- Paid Search

05. COMMUNICATIONS AND PR

- Public Relations
- Sponsorship
- Co-branding
- Press Release
- Media Outreach
- Published Articles, Reprints
- Events
- Speaking Opportunities
- Seminars / Webinars
- Case Studies

06. ASSET MANAGEMENT

- Product Data
- Photography Archives
- Video Archives
- Contact / List Management
- Training Tools
- Sales Tools
- Retail Retrofits

07. PRICING AND POSITIONING STRATEGY

- What is the retail price for each of your products?
- How does this pricing strategy compare to your key competitors?
- What is the margin on your retail price?

08. DISTRIBUTION PLAN**DISTRIBUTION METHODS USED**

Products are sold to customers from you or your staff through:

- Retail locations that your company owns
- Route Sales / Direct Delivery
- Online Sales
- Catalogs / Direct Mail, etc.

INDIRECT DISTRIBUTION METHODS USED

Products are sold to customers via distributors:

- Brick & Mortar Retailers
- Online Retailers
- Other Partners, etc.

09. OFFERS & INCENTIVES

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

10. CUSTOMER RETENTION

How do you keep your customers coming back?

- Ongoing Communications
- Loyalty Programs
- Continuity / Refill Programs
- Subscription Sales / Club Sales

11. 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? These companies' products/services may offer opportunities to generate more revenue.

Example: Restaurants serving a regional wine may earn a referral fee for every diner who signs up for a wine club.

12. 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

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**

