



Marketing Checklist

To help you plan and organize your marketing needs, please fill out this form completely.

Date: _____

OBJECTIVE

1. What is your objective(s)? That is, what do you want the marketing piece to do for you? Please be specific.

(Check all that apply)

- Get your name out there
- Solicit a call
- Educate about our service(s)
- Share new product idea
- Sell the specific product that is being sent out
- Customer appreciation
- Generate sales leads
- Generate referrals
- Warm up a cold call/open doors
- Create goodwill/enhance image (create a positive attitude/feeling towards you/company)
- Other (be specific): _____

2. What is the main message you want to convey?

TARGET AUDIENCE

3. Who, specifically, is your target audience? That is, who do you want to influence with your promotion?

- Current customers
- New prospects or revive old client(s)

Industry: _____

Department(s): _____

Geographic location(s): _____

Size of company: _____

Demographic profile of recipient: age group(s): _____ gender: _____

Lifestyle profile: conservative trendy

4. How many people do you want to reach with this promotion? _____

5. Do you have a target list for this marketing piece (with contact names and addresses)?
 Yes
 No → How are you going to generate your target list? _____ → SKIP TO QUESTION 8

6. How did you generate your target list?

7. How many contacts are on your list? _____

PRODUCT AND PACKAGING

8. Your ideas for themes that best fit your objective(s):

9. Your ideas for product(s) that will most impact your target group and meet your objective(s). Please list item and explain why this is a good fit.

Vendor name: _____ ASI #: _____

Product name: _____ Item #: _____

Why is this item a good fit? _____

Vendor name: _____ ASI #: _____

Product name: _____ Item #: _____

Why is this item a good fit? _____

Vendor name: _____ ASI #: _____

Product name: _____ Item #: _____

Why is this item a good fit? _____

10. Your ideas for packaging: _____

Vendor name: _____ ASI #: _____

Product name: _____ Item #: _____

Why is this item a good fit? _____

DISTRIBUTION

11. How will you reach your target audience?

- Mail/UPS
- Personally deliver
- E-mail
- Other (specify): _____

12. What is your timeframe to implement this piece?

BUDGET

13. How much are you willing to spend *per person* for this promotion? \$_____.

OTHER

14. Have you done something like this before for this target audience? Yes No
For another target audience? Yes No

If yes, what was done and was it successful?

15. Other information that would be helpful for designing:

16. How will you follow up with your target audience?

17. How will you measure the success of the project?
