

Checklist for Marketing 101: A Guide to Winning Customers

Action Item	Purpose	Completion Date	Yes	No
Target Market Research				
Identify my existing and potential customers by separating into demographic categories such as gender, age, income, education levels, location, beliefs, spending habits, etc.	Determines what segment is best for the offerings of my business.		<input type="checkbox"/>	<input type="checkbox"/>
Profile my customer with my product in mind.	Identifies exactly for who my product is geared and whether my product/service actually fits a definable segment or segments of the market.		<input type="checkbox"/>	<input type="checkbox"/>
Position my business saying the right things about my product to the right people in a way they understand.	Personalizes my target market and helps me create effective messaging.		<input type="checkbox"/>	<input type="checkbox"/>
Ensure my product alleviates customer's pain points.	Guarantees I am offering the types of products and services customers need and want.		<input type="checkbox"/>	<input type="checkbox"/>
Leverage a variety of tools and resources to research my target market: <ul style="list-style-type: none"> ✓ Census and Labor Department Publications ✓ Competition ✓ Customer Surveys ✓ Economic Development Organizations ✓ Internet ✓ Maps ✓ Trade Groups 	Ensures a complete target market research approach.		<input type="checkbox"/>	<input type="checkbox"/>

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<i>Marketing Plan</i>				
Incorporate the following components into my marketing plan:	Ensures I will write a comprehensive marketing plan.		<input type="checkbox"/>	<input type="checkbox"/>
Identify my target markets.			<input type="checkbox"/>	<input type="checkbox"/>
Define my products and services.			<input type="checkbox"/>	<input type="checkbox"/>
Outline my pricing strategy.			<input type="checkbox"/>	<input type="checkbox"/>
Describe the product location and distribution.			<input type="checkbox"/>	<input type="checkbox"/>
Develop my promotional strategy.			<input type="checkbox"/>	<input type="checkbox"/>
Review my competition.			<input type="checkbox"/>	<input type="checkbox"/>
Identify my business's competitive advantage.			<input type="checkbox"/>	<input type="checkbox"/>
Prepare my marketing budget.		<input type="checkbox"/>	<input type="checkbox"/>	
Review SBA marketing plan templates and examples.	Provides proven models by which I can pattern my marketing plan.		<input type="checkbox"/>	<input type="checkbox"/>
<i>Marketing Strategies</i>				
Develop surveys and questionnaires.	Increases awareness of my customer's opinions and requirements.		<input type="checkbox"/>	<input type="checkbox"/>
Give freebies and coupons.	Attracts perspective customers.		<input type="checkbox"/>	<input type="checkbox"/>
Offer free seminars or demonstrations.	Introduces my business, products, and services to potential customers.		<input type="checkbox"/>	<input type="checkbox"/>
Use effective signs in well-traveled areas.	Grabs customer's attentions.		<input type="checkbox"/>	<input type="checkbox"/>
Study and know my competition.	Keeps me focused and attuned to my competition.		<input type="checkbox"/>	<input type="checkbox"/>
Create a website.	Gives my business a global footprint.		<input type="checkbox"/>	<input type="checkbox"/>
Start a blog.	Exposes my business to a broad customer base.		<input type="checkbox"/>	<input type="checkbox"/>
Incorporate Social Media.	Creates strong business presence and branding for an inexpensive cost.		<input type="checkbox"/>	<input type="checkbox"/>
Combine a variety of marketing strategies.	Ensures a blended marketing solution to optimize my campaign.		<input type="checkbox"/>	<input type="checkbox"/>

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<i>Measure Marketing Performance</i>				
Incorporate metrics to measure the performance level of my marketing strategies or hire someone to help me.	Allows me to modify my marketing strategies accordingly.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Use web analytic features to measure website traffic or hire someone to help me.	Optimizes website data for precise marketing performance feedback.		<input type="checkbox"/>	<input type="checkbox"/>
Make adjustments to existing social media marketing campaigns, based on results of web analytics and metrics.	Increases social media marketing campaign Return on Investment (ROI).		<input type="checkbox"/>	<input type="checkbox"/>