



SME MARKETING PLAN CHECKLIST

Business Link Pacific (BLP) has prepared this checklist as a guide for SME clients to self-assess the strength of their Marketing Plan/Strategy. As with a Business Plan, there is no ‘right’ structure for writing a plan for marketing, and different SMEs will require different inclusions. The following questions represent features of a Marketing Plan that are typically important. By checking off each against your business, you’ll be well-prepared to discuss the strengths or weaknesses of your marketing planning with BLP, and identify what type of support you might benefit from.

<u>Marketing Plan Checklist Questions¹</u>	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
Do you have a documented Marketing Plan or Strategy? <i>(If ‘No’ exit this Checklist. If ‘Yes’, continue)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is it current and valid for at least one year ahead?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is it being implemented as intended?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it correspond to a Business Plan in terms of supporting the set business goals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it specify your marketing-specific goals or objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it define your existing - and potential - target markets, e.g. geographic, demographic, psychographic segments as used in your sector)? ²	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it reference market research from external sources or internal sources (e.g. customer feedback, website analytics) to verify target markets and the marketing direction you are taking? ²	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it analyse your product/service compared to your competitors (in terms of nature/quality of offering, price, marketing and distribution channels, other) ² ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it define the ‘brand positioning’ of your business’ product/service in terms of how it is presented in the market place and differentiated from your competitors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it define the ‘brand values’ of your business’ product/service in terms of the values/principles your business represents to customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it detail your ‘brand identity’ in terms of logos, the ‘look and feel’ of the design used in all visual representation of your product/service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it identify the price point at which your will position your product/service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it identify the marketing channels you will use to promote your product/ service to target markets and include the rationale for why they are the chosen channels? Example of channels: social media, paid advertising (online, print, radio, signage etc), sales calls, trade shows, distribution of collateral, partnerships, other?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it include an annual schedule showing when certain marketing activities will be conducted over the course of a year? And by whom?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it include allocation of marketing costs against each activity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does it include Key Performance Indicators (KPIs) for each marketing activity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ These questions do not reflect a Marketing Plan format, rather they indicate the key factors any Plan should address.

² This information is also featured in a Business Plan.