

Marketing Checklist

Product / Service Name _____

Date _____

- **Pre-Launch: Planning**

- **Market Research & Analysis:** Date: _____

- ☐ Define target audience(s) (including specific industries and job titles within businesses).
 - Industry/'s _____
 - Job Title _____
 - Other _____
 - ☐ Conduct thorough market research to understand customer needs, pain points, and existing solutions.
 - Need/'s _____
 - Pain/s _____
 - Existing solutions _____
 - Our Solution _____
 - Other _____
 - ☐ Analyse competitors' products, pricing, and marketing strategies.
 - Product/Service _____
 - Pricing _____
 - Marketing initiatives _____
 - Other _____

- **Product Positioning & Messaging:** Date: _____

- ☐ Develop a clear and concise product positioning statement.
 - Example: _____
 - ☐ Craft key messages and value propositions that resonate with the target audience.
 - Example: _____
 - ☐ Determine the Features Advantages & Benefits (FAB's) unique selling points (USPs) of each product.
 - FAB's - Our Vs Thiers _____
 - The difference _____

- **Content Creation:** Date: _____

- ☐ Create compelling marketing collateral, including brochures, website copy, presentations, videos, blog posts, and social media content.
 - ☐ Brochure
 - ☐ Website Page
 - ☐ Email
 - Social media Post/'s
 - ☐ Facebook
 - ☐ Instagram
 - ☐ LinkedIn
 - ☐ YouTube
 - ☐ Other
 - ☐ Presentation
 - ☐ Blog
 - ☐ Magazine
 - ☐ Signage
 - ☐ Other
 - ☐ Develop sales enablement tools like case studies, FAQs, and competitive battle cards.
 - ☐ Case Study
 - ☐ FAQ's
 - ☐ Pitch Card

- ☐ **Launch Plan:** Date: _____
 - ☐ Set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) for the launch.
 - E.G. Costs, Views, interactions, enquiries, Sales- Terminology unique to each Source
 - EXCEL tracking comparison when multiple sources are being utilised.
 - Outline the marketing strategy, including channels, tactics, and timelines.
 - ☐ _____
 - _____
 - _____
 - _____
 - _____
 - ☐ Define the budget and allocate resources effectively. £ _____
 - ☐ Plan pre-launch activities to generate buzz and anticipation (e.g., email campaigns, social media teasers, early access programmes).
 - ☐ Email
 - ☐ Socials
 - ☐ Pre Order Portal / Portal
 - ☐ Other
- **Internal Communication:** Date: _____
 - ☐ Ensure all relevant departments (sales, customer support, product development, Accounts) are aligned on the launch plan and product information.
 - ☐ Provide product training and resources to internal teams
- **Launch & post-launch:** Date: _____
 - **Execute Marketing Campaigns:**
 - ☐ Implement the marketing plan across all channels
 - ☐ Monitor campaign performance and adjust as needed (Marketing Meeting)
 - **Public Relations & Media Outreach:**
 - ☐ Secure media coverage and reviews.
 - ☐ Leverage industry influencers and thought leaders.
 - **Customer Communication:**
 - ☐ Keep customers informed about the new products through email newsletters, social media updates, and blog posts.
 - **Gather Feedback:**
 - ☐ Collect customer feedback and reviews to identify areas for improvement.
 - **Analyse Results:**
 - ☐ Track key metrics (website traffic, leads generated, sales conversions) to measure the success of the launch.
 - ☐ Use data to optimise future product launches.

Sales Checklist

- **Pre-Launch:** Date: _____
 - ☐ **Product Knowledge:** Date: _____
 - ☐ Gain a deep understanding of the product features, advantages and benefits.
 - ☐ Be able to articulate the value proposition and USPs to potential customers.
 - ☐ Understand the competitive landscape and how the product compares to alternatives.
 - **Sales Tools & Resources:** Date: _____
 - Access and familiarise themselves with all sales enablement materials (presentations, brochures, demos, pricing information).
 - ☐ Pitch Card (reverse checklist and or A3 folded)
 - ☐ Checklist (Until knowledgeable)
 - ☐ Brochures
 - ☐ Pricelist
 - ☐ Demo Kit
 - ☐ Ensure CRM and other sales systems are updated with product information.
 - **Sales Training:** Date: _____
 - ☐ Participate in product training sessions to learn effective sales techniques and objection handling.
 - ☐ Practise presenting the product and conducting demos.
 - **Lead Generation & Qualification:** Date: _____
 - ☐ Identify and qualify potential customers within the target audience.
 - ☐ Develop a list of target accounts and contacts.
 - ☐ Utilise marketing-generated leads and proactively prospect for new opportunities.
- **Launch & post-launch:** Date: _____
 - **Sales Outreach:** Date: _____
 - ☐ Contact potential customers through email, phone, etc.
 - ☐ Schedule product demos and presentations.
 - ☐ Participate in industry events and trade shows.
 - **Sales Process & Follow-Up:** Date: _____
 - ☐ Manage the sales pipeline effectively, tracking progress and following up with leads.
 - ☐ Address customer questions and concerns promptly.
 - ☐ Negotiate pricing and close deals.
 - **Customer Onboarding:** Date: _____
 - ☐ Ensure a smooth onboarding process for new customers.
 - ☐ Provide ongoing support and training.
 - **Sales Reporting & Analysis:** Date: _____
 - ☐ Track sales performance against targets.
 - ☐ Analyse sales data to identify areas for improvement.
 - ☐ Provide regular feedback to marketing and product development teams.