

SPMC: Strategy-D Product Marketing Checklist

Business Plan				
No.	Chk	Description	Owner	Due Date
1		7P (Price, Product, Promo, Place, Pkg, Position, People)		
2		Target Market		
3		Product Messaging		
4		Competitive & Trends Overview		
5		SWOT Analysis		
6		Go-To-Market (GTM) Strategy		
7		GTM: sales channel (ecom, direct, distributor)		
8		GTM: Channel Selection criteria		
9		GTM: Margin, Pricing, Backend, Market Dev. Funds		
10		GTM: Discounting Policies / Triggers		
11		RoadMap		
12		Forecast: Unit / Revenue		
13		Break-Even Analysis (financial model)		
14		Exit Strategy (Triggers)		
15		Metrics: KPI (Key Performance Indicators)		
16		Executive Dashboard		
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Marketing Plan				
No.	Chk	Description	Owner	Due Date
1		Marketing Audit (what is available / gaps / needs)		
2		High Level Marketing Strategy		
3		Persona Research & Development		
4		Buyers Journey Map (ACPP/AIDA - Content)		
5		Content Marketing Plan		
6		Social Strategy (Platforms, Voice, Calendar, Approach)		
7		Awareness Campaign (Ads, SEO, SEM, sponsorships...)		
8		Traditional (Events, Webinars, Booths, F2F meetups...)		
9		Demand Gen Campaigns		
10		Product Awareness Plan (timing, campaign, social, digital...)		
11		Calendar of Events		
12		Budget & Resources		
13		Promotions Plans (timing, discounts, BOGO, Freebies...)		
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Sales Enablement & Product Collateral				
No.	Chk	Description	Owner	Due Date
1		Business Cases (cost reduce / revenue improve)		
2		Case Studies (Customer Success Testimonials)		
3		1-Page High Level Summary (sales leave-behind)		
4		Detailed Product Page		
5		Product Requirements Card		
6		Detailed Solutions Brochure		
7		Educational Videos (Tactical Answers focused)		
8		Promotional Videos		
9		Management Support Video		
10		Total Cost of Ownership (TCO) Study (white Paper)		
11		Sales Presentation Deck (high level, detailed)		
12		Sales Script (email: opener, thank you...)		
13		Sales Script (live discussion- what to say to which persona...)		
14		Pricing Calculator tool (sales / web / client)		
15		White Papers		
16		Request for Proposal (RFP) guide		
17		RFP - generic answers		
18		'Canned' customer proposal		
19		Pricing Sheet (for sales staff)		
20		Demo - Automated Recording / Web		
21		Trial Programs (30-60 day free, beta test, reviewers...)		
22		Competitive Comparison Matrix		
23		"How to Sell" Summaries		
24		Quick Overview Sheets (1 page tailored to each Persona)		
25		Sales Certification Program / Sales Quizzes		
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Content Marketing				
No.	Chk	Description	Owner	Due Date
1		Content Marketing Plan (resources, timing...)		
2		Product Blog (post topics, calendar, layout, copy...)		
3		Articles (journal, association publications)		
4		Develop ROI Calculator		
5		White Paper (TCO, trends, other topics...)		
6		FAQ (blog, brochure, external client facing, internal)		
7		InfoGraphics		
8		LinkedIn Group Discussions (active, thought leadership)		
9		eBook - develop for Product / Service / Market Sector		
10		Social Media Tie in / Promotion		
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Awareness & Demand Generation				
No.	Chk	Description	Owner	Due Date
1		SEM ads (create / review / budget)		
2		SEO for Product / Solution oriented pages		
3		Graphic Ads		
4		Conference Presentations		
5		Events Plan (conference, booth, kickoff, launch)		
6		Slideshare campaign		
7		Professional association - sponsorship		
8		Professional association - conference booth		
9		Professional association - presentations/webinar/podcast		
10		Loyalty Program		
11		Grow Email (product focused) database		
12		Newsletter (create, maintain)		
13		Customer: Quick Product Awareness Survey		
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Organizational Readiness				
No.	Chk	Description	Owner	Due Date
1		Internal Communications Plan		
2		Internal Ownership positioning (principle co-ordinator)		
3		Lunch & Learn (seminars, webinars / internal & external)		
4		FAQ document (service desk, sales, implementation...)		
5		Quarterly meeting Presentations		
6		Desk Drops (brochure, messaging, chachka...)		
7		Confirm Readiness: Sales		
8		Confirm Readiness: Services		
9		Confirm Readiness: Finance		
10		Confirm Readiness: Implementation		
11		Confirm Readiness: Sales Engineers		
12		Confirm Readiness: Inventory Mgt		
13		Confirm Readiness: CSR / Helpdesk		
14		Confirm Readiness: Senior Leadership Team		
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Launch Activities				
No.	Chk	Description	Owner	Due Date
1		Launch Plan (Timing, Resources, Awareness, Events...)		
2		Branding / Logo / Tagline / Sub-Branding		
3		Rebrand / Relaunch (if needed)		
4		Public Relations / Analyst Relations events		
5		Analyst / PR information packages (kits)		
6		Launch Presentation		
7		Launch Venue / Demonstration		
8		Demo Scripts		
9		Demo System development		
10		Press Release		
11		Introductory Pricing (Beta Test program...)		
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Advocacy & Feedback				
No.	Chk	Description	Owner	Due Date
1		Establish Customer Advisory Board (CAB)		
2		CAB Plan (venue, timing, feedback, actions)		
3		Win / Loss Analysis (Plan, Questions, Analysis, Actions)		
4		CAB: prioritize recommendations		
5		Brand Ambassadors program (social, community benefits)		
6		Service Quality Survey		
7		Product Quality Survey		
8		Customer Feedback Discussion Calls		
9		Feedback Form Analysis		
10		Beta Testing Feedback & actions		
11		Advocacy Plan (how to get customer advocates)		
12		Customer Referral program (finders fee, reward...)		
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Channel / Ecommerce				
No.	Chk	Description	Owner	Due Date
1		Retailer exclusive programs / product versions		
2		Channel / Retailer demo kits		
3		Sample program		
4		End-Cap Planning		
5		Plannogram		
6		Merchandizing: Collateral (in-store brochures, sample, ...)		
7		Marchandizing: Shelf (popup, offers, coupon books...)		
8		Merchandizing: Signage (Posters, signs, ...)		
9		Packaging considerations (design, information...)		
10		Packaging: In-Store bundling		
11		Packaging: e-Commerce offering		
12		Channel Conference (booth, presentation, seminar)		
13		Channel Contract / Agreement		
14		Digital Marketing Collateral		
15		Channel Leveragable Marketing Materials		
16		Channel / Distributor Agreement Contract		
17		Market Development Funds Program		
18		Backend Channel Program (backend payments)		
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Training				
No.	Chk	Description	Owner	Due Date
1		Service Program		
2		Implementation		
3		Sales Engineers		
4		Customer Service Reps / HelpDesk		
5		Sales teams - Launch / Updates		
6		Update & Training Sales Webinars		
7		Internal Advocates & Ambassadors		
8		Channel / Distributor / Partner Training		
9		Customer Training Program		
10		Certification Program		
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Metrics				
No.	Chk	Description	Owner	Due Date
1		Sales Funnel (size, 90 / 180 day, >360day, close rates)		
2		Sales by Channel (direct, ecomm, distribution...)		
3		Discount Levels (avg, trends, highlights)		
4		Leads Generated (quarterly, yearly, by event)		
5		Webinars (number, attendees, conversion)		
6		Web Collateral (views, downloaded, converted...)		
7		P&L (revenue, vs forecast, Gross Margin, units sold...)		
8		Social (Growth, Vanity, Product Pg hits, Avg Time on Pg)		
9		Inventory (Weeks of Supply, Channel Inv, Aged...)		
10		Helpdesk (call time, volumes, feedback ...)		
11		Training (sessions, attendees, certifications completed)		
12		Conversion (Channel source, Web, Promo, Program...)		
13		Create Executive Dashboard		
14		Customer Product Awareness Targets		
15		Blog Post (visits, bounce rate, tweets, conversion...)		
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