



Resources

PEST Analysis

Porters 5 Forces

SWOT Analysis

Ansoff's Product/Market Matrix

The 4Ps

Boston Matrix

Writing a Brief

Writing a Press Release

Use SMART objectives

Customer Matrix

Call Centre Basic Guide

Planning Tools – Sales Stats

Outline Marketing Plan

Your Business Plan

PEST Analysis

Define your market

Political

Economic

Socio-demographic

Technological

Porters 5 Forces

Existing competitors

The threat of potential new competitors

Substitutes for products offered

The power of suppliers

The power of customers

SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats

Ansoff's Product/Market Matrix

Strengths	Present	New
Present	<i>Market penetration</i>	<i>Product development</i>
New	<i>Market development</i>	<i>Diversification</i>

The 4Ps

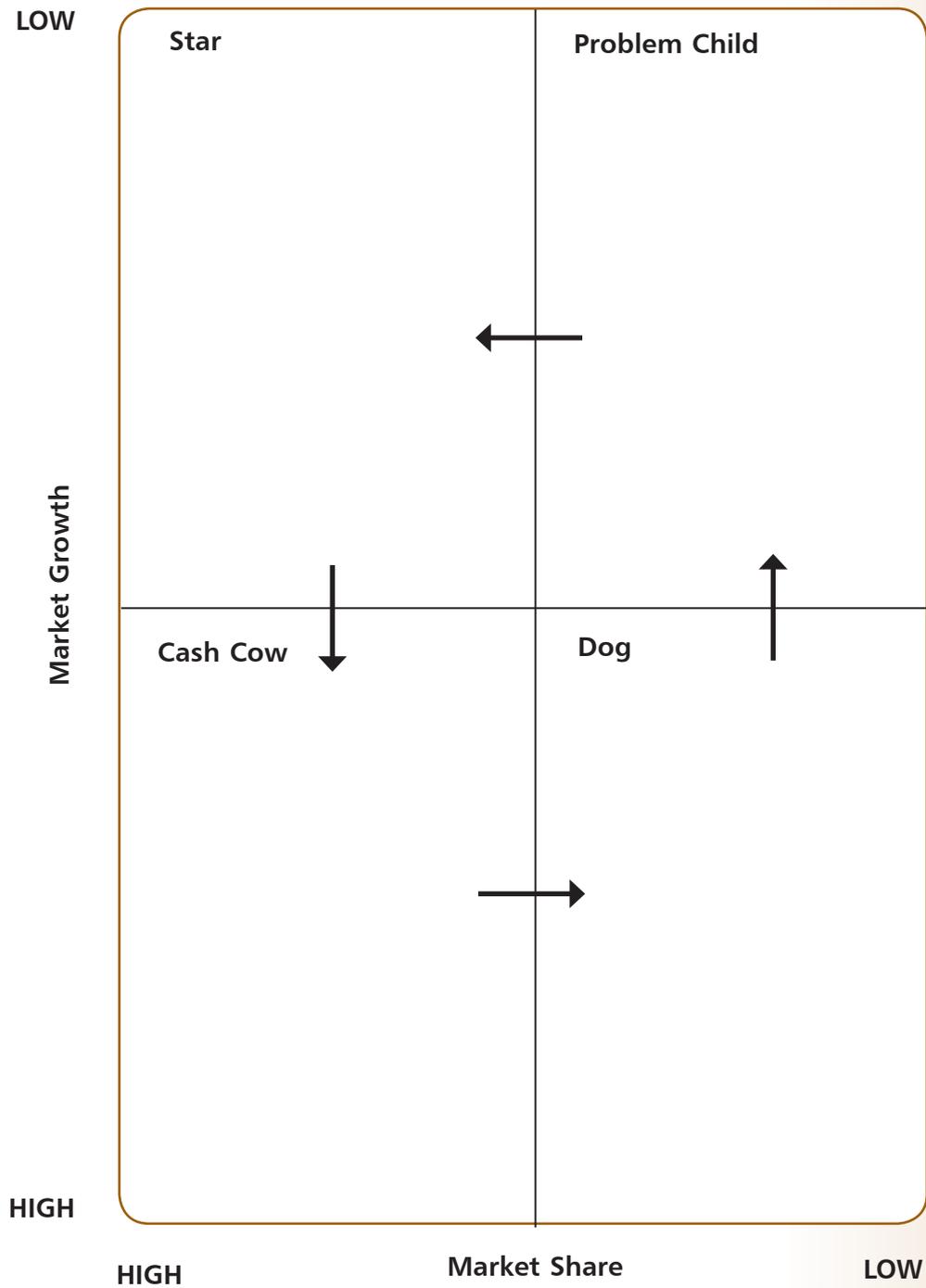
Product

Pricing

Promotion

Place

Boston Matrix



Writing a Brief

Company profile

Market overview

Your objectives & description of task

Audience/target market definition

Budget

Timescale

Reporting requirements

Writing a Press Release

Name of contact.

Company name.

Telephone number.

Fax number.

E-mail address.

Website address.

PRESS RELEASE

HEADLINE.

Opening paragraph (who, what, where, why).

Then relevant product/service information and why your offering is unique.

Quotes from relevant people (staff/industry experts/customers).

Summary of story.

Short company history.

END.

Press releases should be typed, double spaced in a basic format.

Use SMART objectives

Specific – what do you actually want to achieve?

Measurable – how will you measure whether you are meeting the objectives or not?

Achievable – are the objectives actually possible?

Realistic – do you have the resources to achieve the objective?

Timeline – when are you going to do this by?

Customer Matrix

Marketing and Sales Development

This matrix is useful for determining appropriate sales support for each of your customer groups.

Create your own customer profiles based on your industry/service. Define your “good” and “not so good” customers and products.

Each quadrant should be supported by a different sales approach. For instance, you might choose to direct your field based account managers to the customers in the top left quadrant and your call centre or sales support function towards the accounts in the lower quadrants.

	Good Products (for example: new, profitable, little competitive threat, established part of customer's process, price)	Not So Good Products (for example: low margins, low sales value, weak product features and benefits, quality or supply issues)
Good Customers (for example: profitable, loyal, growing, long term contract)	develop and find more customers like these - allocate your best resources to these existing customers and to prospective customers matching this profile	educate and convert these customers to good products if beneficial to them, or maintain customers via account management
Not so Good Customers (for example: low/declining sales value, difficult to service, tied into competition)	invest cautiously to develop and improve relationship , or maintain customers via sales support	assess feasibility of moving these customers left or up , or carefully withdraw from supplying

Call Centre Basic Guide

6 Stages of a Cold Call

- 1 Greeting (short and sweet)
- 2 Permission (check the customer is happy to continue)
- 3 Introduction (brief and clear)
- 4 Benefit Statement (what you have that is of interest to the customer)
- 5 Qualification (establish what the customer needs/wants & how you can help)
- 6 Agreed next step (email information/meeting etc)

Sample Call Centre Scripts

Cold Call

Good morning. My name is xxxxxxxx and I am calling from xxxxxxxx. Although you and I haven't spoken before, my company has been working in your industry sector xxxxxxxx for many years. Other xxxxxxxx (job function) have been telling us that xxxxxxxx is one of their main concerns. We have been able to help with this. Would you be interested in hearing more?

Customer Referral

Good morning. This is xxxxxxx from xxxxxx. I have been given your name by xxxxxxx of xxxxxxx, as we were able to help solve a problem with xxxxxxx. Would you be interested in hearing more?

Outline For An Unscripted Call

- 1 Identify yourself and your company.
- 2 Name any connection you may have.
- 3 Check that the customer has time to talk. Begin building rapport.
- 4 Give a brief summary of what your company does.
- 5 Ask an open ended question to get the customer talking.
- 6 Show that you have listened by reflecting back what they said and add a benefit statement.
- 7 Ask another open ended question.
- 8 Reflect back their answer and request a meeting.

Planning Tools – Sales Stats

Below are suggested formats for your sales reports. Add or modify columns to reflect your business drivers (actual daily, weekly, monthly, cumulative sales; average sales value or profit and comparison actual/cumulative sales last year).

PRODUCT SALES ANALYSIS

	Quantity/ volume	Weekly/ Monthly Sales Values	% Gross Margin	Sales Value Last Year Cumulative	Total Sales/ Gross Margin This Year
Product 1					
Product 2					
Product 3					
Product 4					
Product 5					

CUSTOMER SEGMENT SALES ANALYSIS

	Quantity	Total Sales Values	Average Value	% Gross Margin	Total Sales or Gross Margin
Segment 1					
Segment 2					
Segment 3					
Segment 4					
Segment 5					

DISTRIBUTOR SALES ANALYSIS

	Quantity	Total Sales Values	Average Value	% Gross Margin	Total Sales or Gross Margin
Distributor 1					
Distributor 2					
Distributor 3					
Distributor 4					
Distributor 5					

Outline Marketing Plan

Project Name:

Date:

Written by:

Executive Summary

Situation Analysis

The macro environment, the market (past, present, future), competition, customer analysis, product analysis, distribution/channel analysis.

Own Product Definition

Strengths and weaknesses, benefits to consumer

Competitors

Direct and Indirect

Competitor A (strengths and weaknesses)

Competitor B (strengths and weaknesses)

Cont'd

Product comparison

Price and performance

Customer Segmentation

Demographics, lifestyles, product/service usage

Communications Strategy

Different marketing messages per different segment

Product Launch Plan

Pricing, sales forecast, timescales, budget, promotion

Cont'd

PR Strategy

Timeline, major events, contingency

Advertising

Budget, timelines, media, metrics

Promotional Plan

Direct, indirect, budget, metrics

Packaging

Presentation, pricing, strategy, fulfilment, translation issues

Cont'd

Pricing

Strategy, policies

Distribution

Strategy, channels, international requirements (pricing, presentation etc)

Metrics

Sales, profit, volume, ROI
Daily, weekly, monthly, annually.

Marketing Schedule

Activity by timeline/phase

Your Business Plan

Mission Statement

Clearly state your company's long-term mission.

– Try to use words that will help direct the growth of your company, but be as concise as possible.

The Team

List CEO and key management by name. Include previous accomplishments to show that these are people with a record of success.

Summarize number of years of experience in this field.

Market Summary

Summarize your market in the past, present, and future.

– Review those changes in market share, leadership, players, market shifts, costs, pricing, or competition that provide the opportunity for your company's success.

Opportunities

Identify problems and opportunities.

– State consumer problems, and define the nature of product/service opportunities that are created by those problems.

Business Concept

Summarize the key technology, concept, or strategy on which your business is based.

Competition

Summarize the competition. Outline your company's competitive advantage.

Goals and Objectives

List five-year goals. State specific, measurable objectives for achieving your five-year goals.

– List market-share objectives.

– List revenue/profitability objectives.

Financial Plan

Outline a high-level financial plan that defines your financial model and pricing assumptions.

- This plan should include expected annual sales and profits for the next three years.
- Use several slides to cover this material appropriately.

Resource Requirements

List requirements for the following resources:

- Personnel
- Technology
- Finances
- Distribution
- Promotion
- Products
- Services

Risks and Rewards

Summarize the risks of the proposed project and how they will be addressed.

Estimate expected rewards, particularly if you are seeking funding.

Key Issues

Near term

- Identify key decisions and issues that need immediate or near-term resolution.
- State consequences of decision postponement.

Long term

- Identify issues needing long-term resolution.
- State consequences of decision postponement.

If you are seeking funding, be specific about any issues that require financial resources for resolution.