



MARKETING
YOU

INSIGHTFUL AND ACCESSIBLE
TOOLS TO HELP YOU

**BECOME A BETTER
MARKETER.**

MARKETING TOOLKIT



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Whether you are looking to get started with marketing for your local business or a seasoned marketing professional, it can be very easy to get into a rhythm with your efforts and not take the time to build a comprehensive marketing plan (at least once a year). Marketing is the framework for how you take your products and services to market and engage with customers, both current and prospective, and should be a dynamic business practice. To get you started, this toolkit includes a few basic templates to build a foundational marketing plan.

SITUATION ANALYSIS



This is where you start: a thorough situation analysis will help guide not only your marketing efforts, but it will also inform your core business strategy. The goal is to understand what is happening outside of your business that will impact it.

SWOT ANALYSIS



Once you have an understanding of your business's landscape, you can begin to consider the strengths, weaknesses, opportunities, and threats that are specific to your business. This practice informs both your business and marketing strategies.

OBJECTIVES & STRATEGY



Your marketing objectives are an extension of your business objectives – and being disciplined about mapping marketing efforts back to core objectives ensures your strategy and (ultimately) tactics are all aligned to driving your core business.

SCORECARD



Simply building an informed and thoughtful strategy is not enough – there needs to be definitive metrics for measuring success and failure in a timely fashion. This accountability will inform ongoing efforts and future planning.



SITUATION ANALYSIS

The purpose of this tool is to provide assistance with evaluating trade area situations and trends from the following perspectives: competitive, target consumer, environment, and other sales-driving initiatives. The implications sections for each area is the most important aspect. Be sure to assess how each issue will impact your plan.

COMPETITIVE LANDSCAPE

Remember to include both direct and substitute competitors

1

SITUATION

TRENDS

IMPLICATIONS

TARGET CONSUMER

Psychographic, demographic, behavioral

2

SITUATION

TRENDS

IMPLICATIONS





▶ SITUATION ANALYSIS *continued*

LOCAL ECONOMIC ENVIRONMENT / MARKETPLACE

Think about the macro and micro economic conditions in your trade area

3

SITUATION

TRENDS

IMPLICATIONS

OTHER BUSINESS PLANS & INITIATIVES IMPACTING SALES

Are you expanding your service area? Building a second location? Eliminating a product line?

4

SITUATION

TRENDS

IMPLICATIONS



SWOT ANALYSIS

The intent of this tool is to provide assistance with evaluating your business's strengths, weaknesses, opportunities, and threats that will impact sales.

STRENGTHS (INTERNAL)

Ex: Management tenure

WEAKNESSES (INTERNAL)

Ex: Employees inconsistent with upselling

OPPORTUNITIES (EXTERNAL)

Ex: Local economy is booming because of new employer

THREATS (EXTERNAL)

Ex: Onslaught of competition in close proximity



OBJECTIVES & STRATEGIES

BUSINESS & MARKETING OBJECTIVES

All marketing objectives should stem from business needs and should be specific, measurable, attainable, realistic, and timely.

STRATEGY

Consider how you are going to achieve your objectives. Be careful not to jump straight to tactics - all tactics should align work in concert and align to a strategy. You may have multiple strategies for each objective, depending on how broad your goal is.

TACTICS

Once you've decided on your strategies, you can begin developing tactics.

Here is an example of how a restaurant might build a plan around a business objective.

BUSINESS OBJECTIVE

- » Drive topline sales
- » Increase local controllable income

MARKETING OBJECTIVE

- » Increase average check size per party

MARKETING STRATEGY

- » Push more appetizer and dessert sales
- » Add seasonal appetizer and dessert offerings

KEY TACTICS

- » Merchandise appetizers and desserts in store
- » Offer samples to guests pre/post meal



SCORECARD

The objective of this tool is to create a marketing “scorecard” that concisely outlines your marketing strategy in terms of objectives, tactics, metrics for success, timeframe and (if applicable) project owners. Be specific and quantify as much as possible.

1 BEGIN

with high-level marketing objectives. Focus each section on just one objective.

2 LIST

the programs, initiatives, and other tactics you will utilize to achieve your objective.

3 CONSIDER

how you will measure the effectiveness of each program and determine your metrics for success. These should be measureable and provide accountability for each tactic.

4 DETERMINE

the target timeframe to achieve your objectives.

5 IDENTIFY

project owners for each tactic.

MARKETING OBJECTIVE:

KEY TACTIC

METRIC FOR SUCCESS

TIMEFRAME

OWNER

MARKETING OBJECTIVE:

KEY TACTIC

METRIC FOR SUCCESS

TIMEFRAME

OWNER



SCORECARD *continued*

MARKETING OBJECTIVE:

KEY TACTIC

METRIC FOR SUCCESS

TIMEFRAME

OWNER

MARKETING OBJECTIVE:

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ABOUT US

[MEDIA GROUP NAME] is the largest next generation media and marketing company in [LOCAL AREA NAME] with a passion for growing local businesses. We take time to understand our clients' businesses and objectives and develop custom marketing strategies that are rooted in research, as well as creative solutions that cut through marketplace noise and motivate customers to act. We constantly monitor and optimize campaigns and provide frequent, transparent reporting, because – like our clients – we live and die by results.

LET US HELP
**SHAPE YOUR
WORLD**



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