

TRACK Marketing Worksheets





TRACK MARKETING WORKSHEETS

These worksheets are a part of the TRACK Marketing Book.

To obtain the book please visit: www.trackg.com/frame_book.html

Completing the worksheets can help you apply the TRACK methodology to your organization. They are designed to help you identify and manage all of the pieces that need to come together for a successful project – whether a single marketing related effort or a broad based strategic marketing plan.

Two icons serve as signposts to guide you through the worksheets.

-  Indicates worksheets that you may find helpful to complete.
-  Shows typical answers for each section.

The best marketing campaigns are those which have been carefully and thoroughly planned. Therefore, be as specific as possible when completing the worksheets. The more questions you ask your team and the more needs you anticipate, the more likely you'll be positioned to market your organization successfully.

At the same time, the worksheets should truly be “living documents” that you can modify and adjust to your needs. Duplicate, add to them, or alter the headings if it helps you plan your project more effectively. Like the TRACK methodology they support, these worksheets only work when you use them!

If you are working on a marketing of a public program, you should download the worksheets at: www.trackg.com/trackworksheets.pdf

TRACK Marketing Worksheets



Target Worksheets

The Target phase of your campaign consists of asking and answering the following questions:

- What are your quantifiable financial goals?
- What are your quantifiable marketing goals?
- What are your demographic segments?
- Who are your target market segments?
- How will you track your marketing efforts?



TARGET GOAL: What are your quantifiable financial goals?

Your Financial Target Goals	
Goals	Specifics (metrics, dates)
Budget measured in time and dollars for campaign/project	



Typical Financial Target Goals Include:

- Specific gross profit return
- Net profit goals
- Break-even (self financing effort)

TRACK Marketing Worksheets



TARGET GOAL: What are your quantifiable marketing goals?

Your Marketing Target Goals	
Goals	Specifics (metrics, dates)



Typical Marketing Target Goals Include:

- Increase sales, Increase brand awareness
- Expand cross sell opportunities and/or up-sell opportunities
- Increase repeat business, Increase market share
- Seek referral business, Lead generation
- Increase Web site visits
- Increase attendance at an event
- Launch a new product into the marketplace ,Generate traffic at a retail store
- Collect prospect's name and address to build marketing database
- Create excitement around your offering

TRACK Marketing Worksheets



TARGET DEMOGRAPHICS: What are your demographic segments?

Your Target Demographic(s) – for each segment (A,B,C), detail the demographics that best define the group:	
Target Segments	Specifics
A	
B	
C	

<div style="text-align: center;"> </div> <p>Typical Business to Consumer Demographic Variables Include:</p> <ul style="list-style-type: none"> • Geography <ul style="list-style-type: none"> ○ State ○ MSA (metropolitan area) ○ County ○ Congressional district ○ Zip Code ○ Census Tract ○ Block Group ○ ZIP+4 • Gender • Age • Marital Status • Race • Occupation, income, education • Presence of children • Owner/renter, years residence 	<div style="text-align: center;"> </div> <p>Typical Business to Business Demographic Variables Include:</p> <ul style="list-style-type: none"> ▪ Location ▪ Size of company (employee and/or revenue) ▪ Industry classification (SIC) ▪ Years in business ▪ Job title ▪ Length of time in that position ▪ Type (headquarters, branch) ▪ Franchise status
<div style="text-align: center;"> </div> <p>Typical Association Demographic Variables Include:</p> <ul style="list-style-type: none"> ▪ Length of time ▪ Membership type, e.g., associate, student, corporate, etc. ▪ Sub-group Memberships ▪ Conference Attendance ▪ Workshop Attendance ▪ Volunteer Activities 	<div style="text-align: center;"> </div> <p>Typical Government or Political Demographic Variables Include:</p> <ul style="list-style-type: none"> ▪ Location (Congressional district) ▪ Voting affiliation ▪ Any business to consumer demographic variable that is relevant to the target goals

TRACK Marketing Worksheets



TARGET PSYCHOGRAPHICS: Who are your target market segments? How do they look at the world around them? What makes them tick?

Your Target Psychographics – for each segment, detail the psychographic variables that best define the group:	
Target Segments	Specifics
A	
B	
C	



Typical Psychographics Include:

- Motivations in life
 - Achievement
 - High Income
 - Status
 - Safety
 - Security
 - Social life
- Interests
 - Sports
 - Movies/TV
 - Music
 - Travel
 - Current events
 - Hobbies/crafts
 - Food
- Concerns and fears
- Desires
- Interests - What do they care about?
- How do they perceive themselves?
- How do they perceive your product?
- Why do they buy from you?

TRACK Marketing Worksheets



TARGET: How will you track your marketing efforts?

Your Marketing Database:	
Item	Specifics
Who will establish the database? Who will maintain the database as new information is obtained?	
What are the source(s) for the database initially?	
What data fields will be originally included?	
What data do you plan to append to your database?	
Data mining opportunities?	



Typical Appended Data Include:

- Lead source
- Demographics
- Lifestyle variables
- Date of last change
- Personal attributes
- Sales information
- Needs
- Internal contact



Typical Data mining Include:

- Absence/presence of data
- Geography indicators
- Sales related information
- Source identifiers
- Appended data

TRACK Marketing Worksheets



Reach Worksheets

The Reach phase of your campaign consists of asking and answering the following questions:

- How will you research your target's buying motivations?
- How will you emotionally reach your target?
- What offer can you make that will motivate your target segments?
- How will you physically reach your target?
- What timing or calendar considerations will impact how effectively you reach your targets?

Reaching your target is typically a multi-step process and may require repeated attempts. Use these worksheets to devise your strategy.

Whenever possible, it's best to double-check what you know or dig deeper to get as good an understanding as you can of your target's buying motivations. Use this worksheet to plan how you will further research buying motivations.



REACH: How will you research your target's buying motivations?

Research Methods: give the details of execution for each information-gathering tool, e.g., the state the start date for information-gathering, what analysis will be performed on the data, etc.

Method	Execution Details



Typical Research Options Include:

- Focus Groups
- Mini-Interviews
- Client Advisory Board
- Trade Shows
- Online Options: review email correspondence, monitor message boards

TRACK Marketing Worksheets



REACH: How will you emotionally reach your target?

Buying motivations– for each motivation, give additional details, e.g., the specific aspects of convenience a buyer might seek in this product category:

Buying Motivations	Specifics
A	
B	
C	

<div style="display: flex; align-items: center; margin-bottom: 10px;"> <p>Typical Buying Motivations of Individuals Include:</p> </div> <ul style="list-style-type: none"> • Safety & security of self & family • Increase wealth and/or save money • Social success/prestige • Sex appeal • Food • Healthy living • Comfort & convenience • Education & bettering one's self • Make contributions to society, the world • Religious beliefs 	<div style="display: flex; align-items: center; margin-bottom: 10px;"> <p>Typical Buying Motivations of Business Decision Makers Include:</p> </div> <ul style="list-style-type: none"> ▪ Grow sales & increase profit ▪ Control expenses ▪ Gain market share ▪ Improve operational efficiency ▪ Better safety ▪ Stronger customer service ▪ Limit corporate liability & reduce negative public relations ▪ Boost corporate "good citizen" image
<div style="display: flex; align-items: center; margin-bottom: 10px;"> <p>Typical Personal Buying Motivations of Business Decision Makers Include:</p> </div> <ul style="list-style-type: none"> ▪ Look good to boss ▪ Reduce risk of failure ▪ Clean up a mess or problem ▪ Reduce workload ▪ Increase capability to perform effectively ▪ Other motivations the corporate culture signals as important to company and/or their career growth 	

TRACK Marketing Worksheets



REACH: What offer can you make that will motivate your target segments? What offer can you make (what are you ultimately promising to deliver) that will reach your prospect and make them stand up and notice your message?

Note that it may be appropriate to make different offers to different targets. It may also make sense to make different offers at different times of the year or different stages of the marketing campaign.

Your Offer: Give specifics, such as specific target, amount of discount, time limit for discounts, etc.

Offers	Specifics
A	
B	
C	

TRACK Marketing Worksheets



REACH: What timing or calendar considerations will impact how effectively you reach your targets?

Specify the timing issue and how it will be addressed.	
Timing Issue	To Be Addressed:



Typical Timing Issues Include:

- Seasonal, e.g., summer vacation
- Current events, e.g., elections
- Months, weeks, days.
- Times of the day



REACH: How will you physically reach your target?

Physically reaching your target has two components: 1) where your messages and offers will be placed, e.g., the communication channels you use, and, 2) the physical execution of your advertising and promotional materials and how they capture attention.

Channels: identify what communication channels you will use to reach prospects. Give details for physical execution in each channel.	
Reach Channel	Physical Execution Details

TRACK Marketing Worksheets



Typical Ways to Physically Reach Your Target Include:

- **Print Channels Include:**
 - Magazines
 - Newspapers
 - Newsletters
 - Catalogs
 - Directories
 - Other (Specify)

- **Direct Mail Channels Include:**
 - Post cards
 - Letters, flyers
 - Marriage Mail Packets

- **Multimedia Interactive CDs**
- **Online Channels**
 - Web sites
 - Email
 - Search Engine
 - Web directories
 - Web Seminars
 - Online message boards
- **Sponsorships & Ads**
 - Of newsletters and events
 - Ads in newsletters or program guides

- **In-store/In Person**
 - Floor signs
 - Product ad placements
 - Seminars
- **Radio & TV**
 - Broadcast TV
 - Cable TV
 - Radio
- **Outdoor Media**
 - Billboards
- **Fax Broadcast**
- **Telemarketing**



Physical Execution Strategies Should Consider:

- Size of ad, brochure, or post card
- Colors and scheme
- Photos and illustrations
- Graphic design
- Overall image, e.g., sophisticated, sexy, etc.
- Motivational or meaningful terms, e.g., “free,” “winning,” etc.
- Aroma, fragrance (when appropriate to product)
- Other (Specify)

TRACK Marketing Worksheets



Action Worksheets

The Action phase of your campaign consists of asking and answering the following questions:

- Identify the type of action you desire: Are you generating leads or offers? Is a soft or hard action step more appropriate for you?
- What action do you desire the target to take?
- What can you do to motivate the target to take action promptly?
- What is the typical prospect to client action path?
- What can you do to insure that you are completely ready to respond when action is taken?



ACTION: Identify the type of action you desire: Are you generating leads or offers? Is a soft or hard action step more appropriate for you?

Depending on the scope of your planning, you may be setting both lead and order generation action steps.

In general, you will be identifying action goals for:

- Lead generation offers (earlier steps that work to build a longer term relationship)
- Order offers (goal is near term sale as next step in marketing effort)

Depending on where you are in the sales cycle, you will also be looking at making offers that are either:

- Soft offer (low commitment from prospect)
- Hard offer (higher commitment from prospect)

TRACK Marketing Worksheets



ACTION: What is the typical prospect to client action path? What action do you desire the target to take?

Identify the series of actions might you and the prospect will take from the initial contact to new customer?

Prospect to Client Action Path	
Action Steps /Who Takes This Step?	Details of Action Step
1.	
2.	
3.	
4.	
5.	
6.	

Where possible, provide multiple ways to respond and explore how you can make it easy for your target to respond. Also, include actions you will take if the prospect does not respond.



Possible Action Steps Include:

Offline Action

- Call a toll-free or regular telephone number
- Reply via mail / option for postage paid reply envelopes/cards
- Visit place of business for a specific action
- Respond to a telemarketer
- Make a referral
- Send a fax

Online Action

- Send an email
- Visit Web site and take some specific action
- Complete an online form or survey

You could take similar actions as above if your prospect does not respond.

TRACK Marketing Worksheets



ACTION: What can you do to motivate the target to take action promptly?

Adding a Sense of Urgency/Motivators to Take Action Promptly	
Messages/Offers	Specifics (amount, frequency, etc.)



Soft (Low Commitment) Options for Increasing Responsiveness Include:

- Free information given to all who respond (white paper, etc.)
- Email newsletter
- Demo disk
- Product trial – self serve (via mail)
- Looking for customers to give feedback on a new service
- Off time of day/certain days of week specials/off season
- Online access to proprietary information e.g., salary ranges
- Free samples
- Sweepstakes/drawings
- Free evaluations/check-ups/audits

Hard (Higher Commitment) Options Increasing Responsiveness Include:

- Buy now and save money (Coupons that expire)
- Visit with a salesperson
- Introductory pricing or offer on this year's newest products
- Special pricing on last year's products
- Service contracts
- Free installation
- Product trial – with personal interaction with rep from company
- User hotlines available
- Accessory products offered
- Training included
- Holiday promotions
- Clearance sale
- Slightly used or open items
- Your customer's birthday
- Special promotion related to fund raising effort for charity
- Grand opening or anniversary of your business

TRACK Marketing Worksheets



ACTION: What can you do to insure that you are completely ready to respond when action is taken?

Prospect to Client Action Path	
Action Steps You Can Take to Prepare for Heavy Response	Owner of Action Step



Typical questions to ask yourself and your organization to be sure you are ready to respond to action by your target:

- How will you receive prospect inquiries? Phone, mail, fax, email, web
- What are the qualifying questions to ask inquiring prospects?
- How will fulfillment be handled?
- Who will handle prospect inquiries?
- Who will train people to handle inquiries and log responses?

TRACK Marketing Worksheets



Close Worksheets

The Close step consists of asking and answering the following questions:

- How will you close the sale?
- Is a personal sales person needed to close sales?
- How do you build a personal and trusting relationship with your customer?
- What is your close strategy?
- What are your customer's hot buttons and how do they view the world?

The Close step may be a relatively short and relatively “automatic” process or it may be more involved, requiring handling by a sales professional. The first set of worksheets is for a short Close process and is primarily a checklist to insure that your business is ready when prospects take action.



CLOSE: What arrangements need to be in place for prospects to purchase *now*?

In Person Close Checklist	
Steps	Specifics & Completion Dates)



Typical In Person Procedures/Arrangements To Verify Include:

- Sufficient Staff
- Training for Staff
- Sufficient Inventory
- Products/Services Easily Accessible
- Signage or Directions for Checkouts

TRACK Marketing Worksheets

Online Close Checklist	
Steps	Specifics & Completion Dates



Typical Online Procedures/Arrangements To Verify Include:

- User-friendly Web site
- Easy to navigate Web site
- Clear directions for accessing products/information
- Pre-populated forms, whenever possible
- Secure Web site with privacy policy posted

Whether the sale is closed by a professional sales person or through other channels, buyers' motivations will play a part in how successful the close is. Use this worksheet to identify the primary buying motivations of your prospects and note how staff can address these, e.g., through highlighting particular benefits. This information can be used in telemarketing scripts or to assist in communicating with and training the field sales representatives.

TRACK Marketing Worksheets



CLOSE: What buying motivations will your staff need to be prepared to address to encourage prospects to purchase?

Closing the Sale	
Buying Motivations	Sales Emphasis



Typical Buying Motivations Include:

- Convenience
- Good Service
- Good fit with requirements
- High Quality
- Reliability
- Good price
- Discounts/special promotions
- Strong relationship
- “Hip” or “In” brand

The sales process can best be managed through some of the popular contact management software programs that are available, such as ACT! or Goldmine. These worksheets are designed to assist the marketing manager in identifying what sales activities will be ongoing.

TRACK Marketing Worksheets



CLOSE: What actions should the sales staff take to close the sale?

The Sales Cycle – Prospecting and Lead Follow-up	
Steps	Specifics & Completion Dates
Initial Contact	
Needs Assessment	
Budget Assessment	
Identifying Decision makers	
Confirming Prospect's Action Timetable	

Depending on the prospect and the particular product or service you are marketing, different relationship building actions may be helpful. Identify what your sales staff will use and establish time tables either for completion or for continuing to build the relationship.

The Sales Cycle – Building Relationships	
Steps	Specifics & Dates



Typical Relationship-building Activities Include:

- Phone calls
- In-person sales calls
- Letters/emails
- Entertainment
- Service/assistance (specify)
- Discounts/special promotions

TRACK Marketing Worksheets

Many formal sales cycles follow a fairly set formula: responding to RFPs, giving a product demonstration, etc. Use the chart below to track the sales cycle for each prospect your sales staff has identified.

The Sales Cycle – Making the Sale	
Steps	Specifics & Completion Dates
Response to RFP	
Presentation	
Proof of Concept/Product demonstration or trial	
Site visits	
Provide third-party recommendations	
Contract negotiations	
Delivery/ Implementation/Installation	
Follow-up	

TRACK Marketing Worksheets



Keep Worksheets

Keep consists of asking and answering the following questions:

- How can you build a strong relationship with your current customers?
- How can you show you care and reinforce customer loyalty?
- How can you actively seek referrals from current customers?
- What are natural cross and up sell opportunities?
- How will you analyze data and results to determine what's working and what's not working from your marketing efforts?



KEEP: How will you build strong relationships & reinforce customer loyalty?

Loyalty Building Techniques: identify what techniques you will use to build relationships and loyalty. Give details for execution of each.

Keep Techniques	Execution Details



Keep Alternatives Include:

- **Offline:**
 - Magazines, Holiday/birthday communications
 - Thank-you notes for business or referrals
 - Gifts, Entertainment, Loyalty Cards/Clubs
 - Special pricing/events for preferred customers
 - Maintenance Contracts
 - Sweepstakes, Surveys
 - Database mining for additional offers
 - Follow-up phone calls
 - Invite customers to previews of new products/services
 - Enlist customers in "beta" tests of new offerings
 - Newsletters, Catalogs, Directories
 - Offer seminars/workshops that add value
 - Attend industry conventions, seminars, etc.
 - Attend trade shows
- **Online:**
 - Monitoring Web sites frequented by customers
 - Hosting Web sites/online communities
 - Create Web-based polls that generate interest and return visits

TRACK Marketing Worksheets



KEEP: What will you do to generate customer referrals?

Generating Referrals	
Techniques	Specifics & Dates



Alternatives for Generating Referrals Include:

- **Offline:**
 - Periodically ask for referrals
 - Loyalty programs which reward customers with discounts or other incentives for referrals
 - Discounts or other promotional programs for friends, family or partners who buy your products or services
 -
- **Online:**
 - Chat rooms, message boards, and “Buddy Lists”
 - “Viral” email campaigns

An effective strategy for keeping customers isn't about maintaining the status quo. Your Keep strategy should identify opportunities to grow your customer relationships. Cross selling and up selling educate customers on the many solutions you offer. Plus, a greater variety of transactions with a customer give you more opportunities to learn about the customer. As you gain a clearer insight into your customer's requirements and expectations, you're better able to anticipate needs and customize your offerings.

TRACK Marketing Worksheets



KEEP: How will you identify and leverage cross sell and up sell opportunities with current customers?

Cross Selling and Up Selling Opportunities	
Methods	Specifics & Dates for Execution



Methods for Identifying Cross Sell and Up Sell Opportunities Include:

- **Offline:**
 - Database mining
 - Seek feedback systematically from sales, customer service, and others with direct customer contact
 - Give seminars, workshops and other educational opportunities that bring you into contact with customers
 - Follow-up phone calls to determine satisfaction and identify additional needs
 - Customer service representatives and sales associates probe for interest in additional products/services
 - Signage/product placement at point of purchase
- **Online:**
 - Monitor message boards and other online venues that give customers a forum for discussion of your products and services (or the general industry)
 - Icons or messages prompting additional purchases

TRACK Marketing Worksheets



TRACK WORKSHEET – CONDENSED VERSION



What are you TARGET goals?

- What would you like to accomplish with this effort?
- What resources are available to accomplish your goals?

Who exactly is your TARGET market?

- Demographic, Psychographic, Geographic:



How will you REACH your target market?

- Physically

--

- Emotionally (messaging):

--



What offer will motivate your target market to take ACTION?

What specific ACTION do you want your target market to take once you reach them?

What methods will you make available for them to take ACTION? (Phone, web, email, fax, etc.)



How will you obtain CLOSURE? (Achieve your target goals)



How can you KEEP them after closure? (Cross sale, up sell, referrals, etc.)
