

## CONNECT TO YOUR CUSTOMERS SMALL BUSINESS CHECKLIST

We will work through the following steps in the Connect to your Customers Road Map.

1. Identify your product or service.
2. Review your Business Plan or Marketing Plan (If you have one).
3. Review your Marketing budget.
4. Set goals and expectations on marketing process.
5. Assess you current marketing pieces for branding, effectiveness and messaging. This includes your name, logo, colors, and tagline.
6. Describe your ideal customer. Who do you think will want your product or service? This will include all demographic information: Age, Sex, Education, Income Level, Discretionary Income, Daytime Demographics.
7. What activities do your customers participate in, places they frequent, associations they belong to and additional Lifestyle Attributes.
8. Review top 3 competitors in your marketplace and conduct a Strength, Weakness, Opportunity, Threat analysis.
9. Connect with other referral business partners that share your customer base.
10. Identify and evaluate advertising and marketing opportunities that place you in front of your customers. Focus on sustainable marketing activities.

Examples: Newspapers, Trade Magazines, Direct Mail, Flyers, Social Media, Sponsorships, Trade Show Events, Radio, TV, Internet, SEO/ PPC, and Association Memberships.

11. Brand It to provide contact info, pricing and introductions for advertising that you will handle on a one on one basis.
12. Collaborate on action steps to build network and grow brand presence.
13. Set goals, expectations and timeline on Advertising.
14. Create message appropriate to the marketing opportunity and target market.
15. Brand It to create custom marketing piece designed to Connect to your Customers.

Examples: Direct Mail, Flyer, Sell Sheets.

16. Ongoing monthly consulting to review upcoming marketing opportunities and objectives.
17. Work the plan. Stay focused. Measure the results.



*Lori Marsh – Owner*