

## Marketing technology self assessment

This checklist is intended to help stimulate ideas. It may help you see where you are and where you want to be in using marketing tools. Review each area, looking at what tools and methods you currently use, and what your next step might be. It is my hope that at least some of these suggestions will be new and useful to you.

**Branding:** Creating a memorable, clear picture of what you offer in the minds of your prospective customers.

Have logo

Have slogan

Have “elevator pitch” – 2 minute summary of what you offer

Logo appears on all company documents and packaging

Unified color scheme for company

Have domain name registered

Have web site [www.companyname.com](http://www.companyname.com)

Have email @companyname.com (not @aol, or @comcast.net)

Web site appears on all documents and packaging, and has is integrated with logo and slogan.

Best practices:

Develop a clear look and feel for your company, and implement it everywhere.

Purchase a domain name, and integrate it with your brand. Provide a professional image on and off the internet.

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**Research:** Use the internet to understand and quantify your target market. Use the Internet for competitive advantage in managing information in your field.

Have computer with internet connection

Have email address(es)

Use online search tools to gather information

Have a list of competitor’s web sites

Utilize online tools provided by your vendors and industry associations.

Subscribe to online database services / information services relevant to your field.

Have information feeds, newsletters etc. funneling useful information to you.

Participate in online forums, spend time researching your market on a regular basis

Best Practices:

Use the internet to leverage how you manage information

**Web visibility:** Make your company easy to find by people looking on the internet for you or your type of services.

Have a web site with your company name and address, contact info.

Have a web marketing plan, including search keywords and phrases identified.

Have your web site optimized for search: Meta tags, landing pages, use of keywords, etc.

Site has meaningful inbound links (other sites which are credible in your customer community link to yours)

Your site has significant meaningful original content in your field, and is updated regularly with new content.

Search on targeted keywords brings up your site in top listings

Registered your company with all major search tools, online maps, directories etc.

Tools on your site allow your visitors to link you to various online tools (technorati, reddit, etc.)

Tools on site allow your customer community to create meaningful original content.

Using targeted online advertising (google adwords etc.)

Have a written plan for online advertising, modified regularly by systematic testing.

Best practices:

Design your web site with search tools in mind. Create “landing pages” for specific keyword searches. Develop meaningful, valuable content and put it online.

Reuse content you generate now by putting it on the web. (published articles, ads, brochures, coupons etc.)

Register your company with every possible search tool, vendor referral, online map, directory etc. that you can find.

Register domain names that would lead searchers to your product. Get all related domain extensions: .net .biz .org

Contribute to forums, blogs, etc. which provide visibility in the community your customers inhabit. Build your online reputation.

Create online tools for your customer community, such as forums, self help systems (wiki's), feedback, etc.

Develop a plan for soliciting and getting meaningful inbound links. Schedule time to build your visibility. Remember that the sites that link to you reflect on you in a similar way that referrals do.

Regularly search using your business name, your name, and key staff names to see what you look like online.

**Web Site:** Your website can be an integral part of the way you do business.

Have website

Have web site at your own domain - www.companyname.com

Website has company contact information (name, address, email form, etc.)

Web site educates prospects about your product /service

Web site designed around desired action visitor is to take

Web site provides buying opportunity

Web site integrated with customer service

Web site is updatable

Web site has administrative interface, allowing staff to update content.

Web site is database driven

Web site is based on integrated content management system, used for internal and external documents – version control, workflow/ publishing approval.

Web site is tied to databases used for all company data, and is dynamically updated in real time

Web site has contact form

Web site has user tracking, and data is displayed to user based on history of visitor interaction with the site. (Url tracking links, cookies, logon)

Web site is integrated with CRM system – Web activity is part of customer/prospect database.

Web site provides real time live contact (Visitors currently online, online chat, call me now, webinars, etc.)

Web site provides visitor statistics

Web site has integrated online feedback tools (rate this page, surveys etc.)

Web site is integrated with CRM system – visitor history is tied to all activities with that customer/prospect.

Web site has graphics

Web site has multimedia files (online demos, sales and support tools)

Web site has podcasts

Website provides RSS

Key company staff have blog(s)

Best practices:

Have a written web marketing plan, which is integrated with your business plan. Identify your target web audiences, and the action(s) you want them to take when visiting your web site.

Make your web site an integrated part of your interaction with customers/prospects.

Remember the concept of moments of truth and building community – design every feature of your site to provide a positive impression.

**Newsletter:** Provide systems to stay in front of your prospects/ customers. Add value to the interactions they have with you.

Have a newsletter

Have a written strategy for newsletter

Have an online newsletter

Have newsletters targeted to market segments

Have an online subscription/ unsubscribe form, which provides opt in email, and opportunities for feedback.

Track newsletters using html tags, keep statistics on newsletters read.

Feedback mechanism for individual newsletter topics (Rate this article)

Newsletter integrated with CRM system.

Best practices:

Create a newsletter if you can add value. Make sure it is a positive “moment of truth” for the recipient.

Never send unsolicited email. Always ask permission first.

Many industries provide prepackaged newsletter content that you can use.

Be consistent, or don't do it.

**Search engine marketing:** Targeted advertising to web searchers. Using keywords, provides a link to relevant content (landing pages) on your web site.

Are marketing on the web – using search advertising, banners etc.

Have a written web marketing strategy.

Have a web marketing budget.

Ongoing testing provides feedback for updating your web marketing strategy

Best practices:

Use Google ads and similar services targeted to your local geographic area. It is very cost effective, often under 15 cents per click through.

Create keyword search terms which include “Visalia” or Visalia Ca. – which greatly reduces the competition.

Use marketing tools provided by search vendors to track results, such as google Adwords.

**Internal systems:** information and processes that support you and your staff in providing the product or service your company offers. Making things run smoothly, and enabling productivity.

Use computer(s)

Have a shared data store, users access and share information.

Have a dedicated network server.

Use spreadsheets

Have computerized accounting program

Track all sales, inventory, buying, selling, payroll, etc. in a unified software system.

Computer system is integrated with vendors and customers (Extranet)

Computer system is integrated with web site to provide dynamic data (inventory, sales status, etc.)

Online store / Online customer service

Have phones

Can route incoming calls to anyone in the company at any time (in or out of the office)

Have voicemail

Have voicemail integrated with email.

Phone system is integrated with customer data – call management software.

Online conferencing – shared workspace.

Use .pdf files / Create .pdf files

Scan documents

Document management system – indexing / search, version control, workflow

Have a customer / prospect list

Use contact management software.

Track opportunities, and sales pipeline

Keep history on customers

Have customer relationship management system. (CRM)

CRM is integrated with all business systems

Use remote tools to connect to your office (remote desktop, gotomypc etc.)

Use remote tools to support customers

Provide web based marketing seminars to prospects using remote connection tools

Provide recorded content from previous seminars online

Best practices:

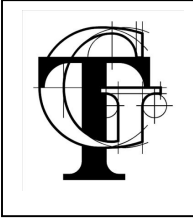
Develop systems, and then follow them. Find ways to streamline the workflow.

Enter data once, have it available when and where it is needed.

Continuously upgrade the tools and skills of your staff.

See knowledge as an asset, and manage it.

Know your customer community. Use tools to stay in touch.



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