Marketing & Operations Inventory & Action Plan



REvisit assumptions
REview assets & resources
REassess methods
REnew relationships
REmember to measure results

Business Inventory & Action Plan Series created by VS Consulting Collaborative www.16WestVS.com



Marketing & Operations Inventory & Action Plan: REvisit assumptions about marketing & operations

Identify what you think/feel about marketing your business:	LIST SOME WAYS TO MAKE CONSISTENT MARKETING & OPERATIONAL ANALYSIS A PRIORITY:
Identify how you feel/think about your current operations:	
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Marketing & Operations Inventory & Action Plan: REvisit assumptions about target market/ operations expectations

DESCRIBE YOUR TARGET MARKET	LIST EVERYONE YOU CAN ASK TO HELP IDENTIFY AND
Who are they?	LOCATE YOUR TARGET MARKET. COULD YOU DO A
What motivates them and why do they need you?	SHORT &/OR ANALYZE OPERATIONS. COULD YOU DO A SURVEY? HOLD A FOCUS GROUP? CONSULT
Where are they?	LOCAL BUSINESS ORGANIZATIONS TO HELP WITH TARGET MARKET RESEARCH AND
How will they find you?	OPERATIONAL ANALYSIS?
THINGS TO CONSIDER: Demographics/lifestyle/needs/wants/expectations/beliefs/concerns/aspirations	
DESCRIBE YOUR OPERATIONAL CHALLENGES:	
Qualified employees?	
Training?	
Resources/Inventory?	
Waste/Leakage?	
Other?	
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Marketing & Operations Inventory & Action Plan: REview Marketing Assets & Resources

LIST ALL CONTENT YOU REGULARLY CREATE OR USE—EXECUTIVE DIRECTOR/CEO REPORTS, EVENT REPORTS, ARTICLES, BLOG POSTS, NEWSLETTERS, STAKEHOLDER/CLIENT UPDATES, QUARTERLY/ANNUAL REPORTS, REVIEWS, PHOTOS, GRAPHICS, VIDEO, AUDIO, ANYTHING!	HOW COULD EXISTING CONTENT BE REPURPOSED, REMIXED, OR REDISTRIBUTED IN A DIFFERENT CHANNEL OR MEDIUM? AUDIO, VIDEO, VISUAL?
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WEBSITE AND/OR BLOG URL:	CHECKLISTS FOR CLARITY OR PURPOSE ☐ Is my business/org clearly the
WHAT TYPE OF CONTENT IS ON YOUR SITE AND/OR BLOG?	focus of the site?
☐ An About page	☐ Is the banner/header branded?
☐ Staff Profiles	Do I have a tagline?
☐ Informational pages about programs/services	☐ On my about page, is my audience clear?
☐ Links to Social Media Sites/Blog	☐ Is my voice/perspective clear
☐ Contact Information on Each Page	in the content?
☐ Progress Reports	☐ Can people understand my message within 5 minutes of visiting?
☐ Business/Organization "News"	CHECKLIST FOR MAXIMIZING
Real photos (not stock images)	IMPACT
□ Video	☐ Is my brand being utilized in all aspects of the site?
☐ PowerPoint Presentations	☐ Do I have social media links
□ Audio	fully integrated throughout the site?
☐ Press Releases	☐ Do I have an email list signup?
□ FAQ or Q&A	☐ Do I have analytics installed?
☐ Articles of Interest—Internally written or from other sources	☐ Do I allow subscriptions to the site? RSS/email?
☐ Inspirational Material—Quotes, photos, excerpts	
☐ Favorite or Recommended Sites or Businesses	☐ Do I have contact info clear?
☐ Discussion Board/Forum	☐ Have I linked reviews, praise, news and other material?
Other:	Consulting
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INVENTORY NUMBER OF FANS/FRIENDS/FOLLOWERS, LENGTH OF INVOLVEMENT (SINCE WHAT YEAR?), AND GROWTH PER MONTH IF APPLICABLE	CHECKLIST FOR CLARITY & PURPOSE ☐ If you have a Facebook page, do you have a daily or weekly posting strategy?
FACEBOOK PERSONAL PROFILE	☐ If you have a Twitter account, what is your voice, perspective or focus?
FACEBOOK FAN PAGE	Do you have social media buttons on your website? Share buttons on all your content?
TWITTER	If you participate on community sites, message boards or blogs, are they compatible or connected with your business/org message?
LINKEDIN	WHERE DO YOUR CUSTOMERS OR STAKE- HOLDERS HANG OUT
GOOGLE PLUS	ONLINE? GUESS IF YOU DON'T KNOW.
YOUTUBE	TOOLS FOR EFFICIENCY & IMPACT BEING USED Hootsuite
OTHER COMMUNITY SITES	☐ Twitterfeed ☐ Facebook Insights ☐ Google Analytics ☐ Buffer ☐ Other
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Marketing & Operations Inventory & Action Plan: REview Operational Assets & Resources

INVENTORY	BRAINSTORM SOME WAYS TO REPURPOSE/REUSE EXISTING RESOURCES TO IMPROVE OPERATIONS:
SOCIAL/COMMUNITY EQUITY	
COLLABORATION OPPORTUNITIES	
WORKFORCE EXPERTISE	
BARTER OR TIME-BANKING	
COMMUNITY RESOURCES	
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Marketing & Operations Inventory & Action Plan: REassess Marketing Methods

LIST ALL THE MARKETING METHODS YOU CURRENTLY USE:	WHAT'S WORKING?
	WHAT'S NOT WORKING?
	WHAT HAVEN'T YOU TRIED & WHY?
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Marketing & Operations Inventory & Action Plan: REassess Operational Methods

LIST BASIC ELEMENTS OF YOUR BUSINESS OPERATIONS:	WHAT'S WORKING?
	-
	_
	-
	_
	_
	WHAT'S NOT WORKING?
	_
	WHAT HAVEN'T YOU TRIED & WHY?
	-
	-
	-
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Marketing & Operations Inventory & Action Plan: Identify & REnew Relationships

LIST NAMES OF PEOPLE IN YOUR PERSONAL AND PROFESSIONAL LIFE THAT YOU WOULD FEEL COMFORTABLE CONTACTING VIA EMAIL OR PHONE	LIST ALL ORGS, SCHOOLS, BUSINESSES, MEDIA OUTLETS, PROFESSIONAL ASSOCIATIONS, ETC YOU HAVE A RELATIONSHIP WITH
	LIST THE MOST INFLUENTIAL PEOPLE WITH WHOM YOU OR YOUR BUSINESS/ORG HAVE A CLOSE CONNECTION
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Marketing & Operations Inventory & Action Plan: REmember to measure marketing results

ARE YOU MEASURING THE FOLLOWING ON YOUR WEBSITE/BLOG?	HOW CAN YOU MAKE MEASURING RESULTS A
Monthly Visitors	PRIORITY?
Traffic growth trend by month/year	
New Visitors Vs. Repeat Visitors	
Keywords that bring people to your site	
To 5 40 or female to come o'to	
Top 5-10 referrals to your site	
Top ranked content	
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Marketing & Operations Inventory & Action Plan: REmember to measure operational results

ARE YOU REGULARLY REVIEWING: Analytics (traffic from where, when, how)?	HOW CAN YOU MAKE MEASURING RESULTS A PRIORITY?
Reports (sales, profit & loss)?	
Customer/Employee Satisfaction & Retention?	
Efficiency Studies (time, safety, resource mgmt.)	
Growth?	
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