

MARKETING INITIAL HEALTHCHECK - QUESTION SET

CATEGORY	DECISION	DESCRIPTION	RESPONSES
1. WHERE ARE WE NOW? - CURRENT MARKETING SITUATION			
INTERNAL			
1	AUDIT	Positioning	What is your current positioning in the market? What are your points of difference (USP's)? Do you have a value proposition for each sector/ segment that you target? Do you have clearly defined segments and targets?
2	AUDIT	Products and services	What are customers buying? What are the characteristics? (i.e. services, advice etc)What is the extent of new products and services development? What degree of success is there with new launches? How many ideas are generated? How many get to market?
3	AUDIT	Communication	What are the principal methods of communication in each market area? E.g. direct mail, e news, poster sites, leaflet drops, local media advertising, word of mouth, PR i.e. editorial, radio, cinema, TV, internet, e-marketing, social media, direct marketing, sample drops, local community activities, seminars etc. What is your current approach to using social media?
4	AUDIT	Competition structure	Make up of companies in the area, major players standing/ reputation; extent of excess capacity (where can you make inroads?); distribution capability (what catchment do your competitors draw from?); Are there any key customer target groups where there is a gap?; what marketing methods do they use (are there obvious or less obvious gaps?); Are there any existing competitive arrangements/ tie ups? (can you establish any?); What is the extent of any diversification by your competitors currently?; Are there any other new entrants?; what about mergers or acquisitions on-going or possible?; Are any competitors struggling financially? Is there any outside investment to competitors locally? What are the competitors key strengths and weaknesses?

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5	AUDIT	Orientation	Conduct market orientation assessment (PIERCY ASSESSMENT TEST) - score; customer orientation, competitor orientation, long term perspectives, interfunctional coordination, organisational culture. Look for areas where orientation can be improved.			
6	AUDIT	Core competences	Establish what they are. In each case ask; how long could we dominate our business if we didn't control this competency? What future opportunities would be lose with it? Does it provide access to multiple markets? Do customer benefits revolve around it?			
7	AUDIT	Sales and marketing data	What exists currently (e.g. CRM or Contact management system) Where is it stored? How is it used? Who has access to it? What decisions can be attributed to it? What database exists? Is it up to date? Who is responsible for keeping it up to date? Are marketing initiatives being created using this data? If so, are they effective?			
8	AUDIT	Operations and resources	Marketing objectives - Are your objectives clearly stated and consistent with ORGANISATION objectives (MISSION AND VISION)? What are they? Are the organisation's mission and vision statements written down? Are they shared with the organisation's employees, its customers' and its markets'?			
9	AUDIT	Operations and resources	Marketing Strategy - What is the existing strategy – if applicable? Are there sufficient resources and are they effectively allocated across your existing activities? Is the strategy known to all employees? Is its effectiveness being measured?			
EXTERNAL						
10	AUDIT	Current marketing mix variables and detail	Market research. What market or marketing research is being conducted? What data currently exists? How is it being used from a decision making perspective?			

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11	AUDIT	Marketing research	What do your customers, prospects and intermediaries think about you? Their perceptions, attitudes, needs and wants? What is happening in current markets? Size, forecast changes, relative competitor strengths. What market opportunities are there for your organisation? What exploratory insight is needed?
2. STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS			
12	SWOT	Overview	Conduct your own <i>initial</i> analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT) and the issues arising from these that the plan must deal with. Strengths and weaknesses are the internal factors (i.e. The business or organisation itself) and opportunities and threats are the external ones E.g. Competition activity would be an external threat.
13	SWOT	Prioritise	Using A, B and C - prioritise each of the Strengths (in terms of importance to the marketplace), Weaknesses (in terms of those which need to be addressed most urgently), Opportunities (in terms of attractiveness) and Threats (in terms of most likely to impact in the planning period).
3. ANALYSIS			
14	ANALYSIS	Segmentation, targeting and positioning	How is your market segmented and targeted currently? Does this need to be revised or updated? Examples; geographical, demographic, brand loyalty, usage level, product or service type, by benefit offered, lifestyle or taste, market niche, psychographic (cultural attitude and psychological types) ... what positioning strategies are implicit in the agreed segmentation and targeting objectives?
15	ANALYSIS	Market attractiveness and relative strengths	Which market or markets are you strongest in? What are the critical factors for success in each market? Which market is the most attractive? How do you currently assess which markets to be in and which to withdraw from or not enter?
16	ANALYSIS	Prioritise where resource and effort should be placed	How do you currently prioritise marketing spend, effort and resource?

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4. WHERE DO WE WANT TO BE - OBJECTIVES/ AIMS - ALL SHOULD BE SMART			
17	OBJECTIVES/ AIMS	Marketing Objectives	Internal processes - What changes are needed to the way in which the organisation does things or organises itself to meet the marketing objectives? Internal communications - What process exists for communication within the organisation? Is there an internal marketing plan? Who manages internal communications currently?
18	OBJECTIVES/ AIMS	Marketing Objectives	Innovation/ learning/ People development - What are the current aims from a learning perspective to support your current marketing objectives? Is training on marketing taking place currently? What related training is happening to improve your marketing effectiveness?
19	OBJECTIVES/ AIMS	Marketing Objectives	Collaboration with other functions or partners - What level of collaboration happens now with internal functions or outsourced partners to identify and meet customer needs and wants effectively?
5. STRATEGY			
20	STRATEGY	Value Propositions	A statement of the 'bundle of benefits' being offered to customers and potential customers by segment. What are the additional benefits offered to your market(s) over and above the core products or services? USP'S (Unique Selling Points) - what are they? Are they clearly stated by market or business unit?
6. ACTION PLAN			
7. PROJECTED PROFIT AND LOSS			
21	FINANCIAL	Budget	What budget is currently allocated for marketing? How is it derived? Is it specified from the top of the organisation down, from a planned set of activities up or a combination of the two?
8. CONTROLS			

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22	MEASUREMENT	Return on marketing investment	<p>How do you currently measure the results of your marketing activities? How often do you review marketing results? Who conducts the review? What specific methods do you use? E.g. Brand valuation, budget variances, profitability, loyalty measures (retention, attrition rates, recommendations, willingness to delay purchase or pay a premium), productivity measures, new product/ service analysis, business unit effectiveness, campaign measurements etc..</p>