

Project Management Checklist & Planning Guide

Purpose

This guide serves as a convenient checklist of marketing actions that should be considered when introducing a new product or service. It should be updated as the project continues and included with funding requests and when submitting projects for management approval.

Date:

Project Manager:

Project Name:

Project Goals:

Project Schedule: (Initial)

Completion Date:

Other Individuals Involved:

- Product Development:
- Marketing:
- Manufacturing:
- Marketing Communications:
- Advertising Agency: Media II
- Other:

Base Information

List five major product or service features:

- 1.
- 2.
- 3.
- 4.
- 5.

List five major customer benefits:

- 1.
- 2.
- 3.
- 4.
- 5.

Provide a 75-word product / service description:

Funding:

- Project authorization request completed:
- Charge Numbers:

Tactics & Considerations:

Expand upon the following Tactics & Considerations required to implement your strategy. Where possible, indicate person(s) required for completing tasks.

Market Research:

- Primary (original) Research
- Existing Research Reports
- Test Marketing

Market Planning:

Choose a Market Strategy:

- Build Market Share
- Take Market Share From Competitor(s)
- Defend Market Share
- Replace Existing Product(s)
- Other

Establish Measurable Objectives, (i.e., "20 percent increase in 12 months" etc.):

Product / Service Positioning (Competitive products, as well as other company products):

Possible Problems:

Develop Business Plan:

- Product Planning & Development
- Organize planning teams
- Develop concept budget
- Prototype development
- Beta site testing
- Develop product life-cycle plan
- Product mix planning
- Product branding & packaging

Channels to Markets:

- Direct sales
- Distribution
- Agents / reps
- Integrators
- OEMs
- Private branding
- Catalog houses
- Ecommerce
- Contracts / compensation agreements

Pricing:

- Pricing strategies
- Profit margin analysis
- Discounts / multipliers
- Price pages

Legal Aspects:

- Relevant Legislation
- Patents
- Trademarks
- Copyrights
- Contracts
- Guarantees & Warranties
- Terms & Conditions

Marketing Communications

- Develop Marketing Communications Objectives, Strategy & Plan
- Establish Budget

Internet Marketing Plan

- Advertising Plan
- Media Selection
- Budget

Public Relations

- News releases (product & literature)
- Feature articles
- News conference / Press tour
- Technical seminar / webinar
- Merchandising / Promotional items
- Promotion in existing newsletters
- Product / application photos

Internet Marketing

- Website integration
- Homepage
- Product page
- Landing page
- Email announcement
- Internal/Sales
- Customers/prospects
- Printed collateral
- Brochure
- Data Sheet
- Search engine optimization – keyword search phrases
- Third party websites (i.e., Thomas Register, GlobalSpec)

Collateral Support Materials

- Instruction manuals
- Technical diagrams
- Data sheets
- Sales brochure
- Catalog
- Competitive comparison
- Technical reports / white papers
- Professional association papers
- Application notes
- Product summaries
- Flip chart for sales channel
- Identify product launch material and timing:
- Paper launch
- Digital launch
- Website launch

Distributor / Dealer Promotion

- Point of purchase displays
- Imprintable mailers, brochures, catalogs
- Website graphics / links
- Demonstration units
- Tradeshow materials
- Co-op advertising
- Promotional items

Photo/Video

- Photography or illustration
- Sales & training video
- Product feature / benefit video
- Sales presentation
- Software demonstration disk

Trade Show / Seminars

- Industry trade shows
- Booth / Display panel layout
- Demonstration units
- Customer seminars
- Sales / Distributor seminars
- Editor booth visits / events
- Customer events

Training

- Hardware / Software / Service
- Industry / Application
- Training by channel
- Regional sales training
- Demonstrators

- Plant tours
- Customer plant tours

Inquiry Handling

- Acknowledgment
- Literature fulfillment
- Field notification
- Customer satisfaction survey
- Inquiry analysis / Feedback
- Establish CRM database

Support Programs

- Service
- Repair / Remanufacturing
- Maintenance
- Trade-in / Trade-up
- Installation / Start-up
- Post Commissioning Audits
- Spare Parts / Kits Program
- Warranty

Project Timeline

- Date:
- Project Manager:
- Project Name:
- Activity Scheduled:
- Actual Completion: