Marketing Planning Toolkit Menu

The Marketing Planning Toolkit is designed for business owners and marketing executives looking to develop more effective marketing programs to increase sales and attract and retain profitable customers. It includes more than 40 marketing applications, interactive tools, guides and templates for marketing planning, competitive analysis and CRM (customer relationship management), consumer and competitive market research, product strategy and development, and much more. The toolkit includes HTML and Flash tools as well as Word, Excel, and project management templates created with Gantt Project an open source project management software package that is available for Java, Windows, iOS and Linux platforms. The GANTT chart templates can be opened with Microsoft Project or you will need a version of Gantt Project freeware which you can download at www.ganttproject.biz.

Instructions: Click the hyperlinks next to the tool description to launch a tool. If you select the HTML version, it will open in your default browser. Selecting the Excel, Word or Gantt Projects versions will open it in that application or give you a choice to open the file with one of those applications.

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Table of Tools

Name	Description	Versions	
Marketing Planning & Analysis Tools			
Marketing Assessment Tool	Use this tool to perform a detailed audit of your organization's marketing that gives you an impartial, neutral valuation of your marketing strategies, processes, practices, programs, and operations. It evaluates your performance on 350+ factors. Will help you identify problem areas / areas of opportunity for improvement.	HTML	Excel
Marketing Performance Evaluator Tool	Use this tool to score your organization's performance on each of twenty-five key marketing activities and assess their level of importance in achieving its overall goals.	HTML	
Marketing Plan Guide and Template	Use this 25 page template to develop your annual marketing plans. Each section has detailed instructions to guide you the planning process. The guide walks you through each step in the planning process.		Word
Marketing & Sales Process Analysis Template	Use the marketing and sales processes analysis template to layout and analyze the various sales and marketing processes in your organization. The table lists a variety of processes that are involved in administering the various functions within the marketing and sales operations in a company internally or externally for a company if any of these functions are outsourced. The processes are listed in alphabetic order. Not all organizations have all of these processes, and some organizations may in fact, combine some of them.		Word
Company Competitive Situation Analysis Tool	Use this tool to quickly assess your organization's competitive position and determine the major issues or problems you must address to improve the competitive position of your organization.	HTML	Word
Competitive Analysis Tool	The Competitive Analysis Tool is a comprehensive (61 questions) assessment of your organization and your competitors in the areas of management, finance, sales and marketing, distribution, product and pricing, quality, support and service.	HTML	Excel
Competitive Positioning Mapping Tool	Use the competitive positioning mapping tool to help you compare your capabilities against those of five competitors based on customer buying criteria. You can compare up to 10 different criteria.	HTML	Excel

Competitive SWOT Analysis Tool	Use this tool to conduct a comprehensive S.W.O.T. (strengths, weaknesses, opportunities, and threats). It will enable you to assess your organization's internal and external market facing strengths and weaknesses, and comparing them to those of your competitors.	HTML	Excel
Competitive Continuum Charting Tool	Use this competitive continuum tool to give you a quick visual representation of where your business ranks verses your competition. Where is your business located on this continuum? How does your business rank in these areas?	HTML	Excel
Competitive Radar Tool	The Competitive Radar tool enables you to compare your organization's and up to four of your competitor's performance in ten key categories. The table and chart that are produced will give you an idea of where there are gaps in your competitors' market strengths as they relate to your company's own strengths.	HTML Flash	Excel
CRM Vendor Evaluation Tool	Use this CRM application and vendor evaluation tool to compare potential CRM solutions and the vendors that provide them. For each parameter, rank vendors' applications and or the vendors based on their ability to deliver on your requirements.	HTML	Excel
CRM Assessment Tool	The CRM (Customer Relationship Management) Assessment will help you identify opportunities to optimize your current customer relationships and improve acquisition and retention performance	HTML	Excel
Customer Life Time Value Calculator	Use this Customer Life Time Value Calculator to calculate the Life Time Value of a customer, which is the monetary value of a customer over their lifespan as a customer.	HTML	Excel
Customer Net Present Value Calculator	Use this Customer NPV (Net Present Value) Marketing Calculator to calculate the "Net Present Value" of a customer based on cost of capital, their profitability, purchase history and lifespan (how long they are a customer).	HTML	Excel
Customer Retention Rate Calculator	The customer retention rate marketing calculator will calculate the year-over-year retention rate of your customers and the projected customer life time in years based on the variables you enter for the number of customers who purchased in the first year and the number of them that were still purchasing in the second year.	HTML	Excel
Bad Data Analysis Tool	This calculator will tell you if it's the correct financial decision to update your house file before mailing a promotion based on the cost of cleansing each record and the potential missed sales and profits from mailing bad names. How much lost opportunity depends on the cost of doing the cleansing and also how many opportunities you miss based on your estimate of the percentage of bad records in your file.	HTML	Excel
Sample Size Calculators	Use the Sample Size Marketing Calculators to determine a sample size for testing the response to an upcoming B2B or B2C direct marketing campaign, or for a research survey in which you want to determine how many people to interview or send questionnaires (the minimum sample size).	HTML	Excel

Campaign Planning Tools

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Marketing Campaign Planning Guide Template	Use this 20-page planning guide and template to create your marketing campaign, which may include one or more tactics or be a fully integrated marketing campaign. Each section includes instructions to guide you through the planning process and details each aspect of the campaign.	HTML	Word
Campaign Response Rate Calculator (Based On Project Revenue)	Use this Campaign Response Rate Marketing Calculator tool to calculate overall response rate required to achieve your desired revenue for this B2C or B2B direct response campaign and also the number of inquiries, leads, opportunities, qualified opportunities, and closed sales needed to achieve this profit based on the advertising circulation and costs for a program, the average revenue per transaction, and the gross margin percentage for that transaction that you enter.	HTML	Excel
Campaign ROAI Calculator	The Marketing Campaign ROAI Calculator (return on advertising investment or sometimes called the ROMI (return on marketing investment) Calculator will help you learn immediately if your product(s) made money or can make money via the media used	HTML	Excel
Campaign Lead Projections Woorksheet	Use this worksheet to layout your marketing campaign sales opportunities by industry and market segment; message and offers, activities calendar, lead projections, campaign spending and overall campaign budgets for the period.		Excel
Simple Marketing ROI Calculator	This tool will compute the simple return on investment (ROI) for a	HTML	Excel

	marketing campaign based on gross sales for the campaign, cost of goods sold and the total advertising costs.		
Campaign Circulation Size Planning Tool	This tool will determine the size (circulation) of a campaign that achieves your desired revenue objective based on response and conversion rates and your average transaction value. This tool will tell you how big your mailing or circulation has to be.	HTML	Excel
Campaign Inquiry Calculator	Use this Direct Response Inquiry Marketing Calculator to determine the number of mailings needed for your B2B or B2C direct response campaign in order to generate the desired number of inquiries.	HTML	Excel
Campaign Response Analysis Tool	Use this tool for tracking responses to all types of direct response campaigns, regardless of media, as long as you know the projected weekly percent of responses.	HTML	Excel
Campaign Financial Results Analysis Tool	Use this tool to calculate campaign financial results based on the campaign quantity, advertising costs, and other factors that you enter into the fields on the right side of the tool.	HTML	Excel
Marketing Campaign Plan Project Template	Use this Gantt Chart template to layout your marketing campaign plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can elminate or add tasks and set up the appropriate timing and also the persons responsible for each task. You will need a version of Gantt Project freeware which you can download at www.ganttproject.biz or Microsoft project to open this template. **Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.**		Gantt Project

Marketing Communications Planning

Promotional Capabilities Assessment Tool	Use the Promotional Assessment Tool is to determine your organization's overall readiness for successfully using integrated marketing campaigns across multiple media for promoting your products (services) to generate revenue and drive profits.	HTML	Excel
Advertising Media Selection Tool	Use this Direct Response Advertising Media Selection Tool to select the appropriate media for your direct marketing campaign based on the advantages and disadvantages of the various media types.	HTML	Excel
Sales Promotion Planning Checklist Tool	Use the sales promotion planning checklist to track every important task or activity in developing your sales promotional plans.	HTML	Word
Marketing Agency Evaluation Tool	The Agency Evaluation tool will help you select a creative or marketing agency from several candidates based on an objective scoring system.	HTML	Excel

Digital & Social Media Marketing Tools

Digital Marketing Assessment Tool	Use the Digital Marketing Assessment to perform a detailed audit of your organization's digital marketing to access your digital marketing strategies, processes, practices, and programs.	HTML	Excel
Social Media Marketing Readiness Assessment Tool	Use this self-assessment to help you quickly determine your organization's readiness for launching and/or expanding your social media marketing efforts as part of your overall integrated marketing communications strategies and programs.	HTML	Excel

Product Marketing & Management Tools

Product Life Cycle Assessment Tool	Use the Product Life-cycle (PLC) Assessment Tool to help you quickly assess key characteristics of a product's life-cycle, which stage it is in, and produce marketing objectives and strategies for that stage.	HTML	Excel
New Product Idea Screening Tool	Use The New Product Idea Screening Tool as an aid in the screening process for rating new product ideas, to help you spot good ideas and drop poor ones early in the process to keep product development costs down and speed product concept development.	HTML	Excel
New Product Launch Plan	Use this template to layout every aspect of your marketing program and activities for launching a new product. The template can be used for both business-to-business or business-to-consumer product launches.		Word
New Product Marketing Plan Project Template	Use this Gantt Chart template to layout your plans for a new product launch marketing plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can elimate or add tasks and set up the appropriate timing and also the persons responsible for each task. **Note: To launch this template,**		Gantt Project

you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.

New Product Launch Plan Calendar Budget Template & GANTT Chart	Use this Excel Gantt Chart and budget template to layout your new product development and marketing campaign launch plans budget and also track marketing expense. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. This template runs in Excel.	[Excel]
New Product Launch Plan Project Template	Use this Gantt Chart template to layout your new product channel and communications launch plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. **Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.**	[Gantt Project]
New Product Launch Plan Calendar Template	Use this template to layout every aspect of your marketing communications programs and activities for launching a new product. The template can be used for both business-to-business or business-to-consumer product launches.	[HTML] [Excel]
Post Launch Product Evaluation Project Template	Use this Gantt Chart template to layout your post new product launch follow-up plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. **Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.**	[Gantt Project]

Sales Planning & Management Tools

Sales Capabilities Assessment Tool	Use this tool to help you determine if your organization's sales capabilities are in line and appropriate for helping your organization compete and achieve your overall business financial goals.	[HTML] [Excel]

Marketing Tutorials / Workshops

Note: All tutorials are contained in zip files. Unzip the tutorial file and then open the html file in the folder in your default browser.

Marketing Planning Tutorial	Marketing 101 tutorial to guide you through developing and optimizing marketing plans. It covers all aspects of developing your target markets and segmentation strategies, product and services strategies and supporting communications strategies and budgets.	[Zip File]