B2B Marketing Toolkit Menu

The B2B Marketing Toolkit is designed to help B2B marketers looking to develop more effective marketing programs to increase sales and attract and retain profitable customers. It includes sales and marketing applications, interactive tools, guides and templates on a wide variety of topics: marketing, direct marketing, database marketing, CRM (customer relationship management), customer acquisition, lead management and nurturing, customer retention, telemarketing, e-commerce, email marketing, marketing communications, sales promotion, consumer and competitive market research, product strategy and development, and much more. The toolkit includes more than 80 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.

Quick Links Menu to Sections

Marketing Planning & Analysis	Campaign Planning Tools	Marketing Communications Tools
Direct Marketing Planning Tools	Digital & Social Media Marketing Tools	Event & Trade Show Marketing Tools
Product Marketing & Management Tools	Sales Planning & Management Tools	Tutorials & Workshops

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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 & 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 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
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

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
1-Step Campaign Lead Conversion Breakeven ROI Calculator	Use this calculator to compute the overall response rate required to achieve breakeven and also the number of inquiries, leads, opportunities, qualified opportunities, and closed sales needed 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
2-Step Campaign Lead Conversion Breakeven ROI Calculator	This tool is used to determine the overall profitability of a 2-Step promotional campaign and also the breakeven of the campaign based on the parameters you enter. Use the scroll bar at the right to read all of the instructions before using this tool. A two-step campaign involves contacting a prospect via telephone or sending a promotional piece to them via mail or email...Step 1. Step 2 involves sending some sort of fulfillment package or piece to the person who responded to your initial promotion/offer. This fulfillment kit could be some sort of premium, white paper, etc.	HTML	Excel
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
Simple Marketing ROI Calculator	This tool will compute the simple return on investment (ROI) for a marketing campaign based on gross sales for the campaign, cost of goods sold and the total advertising costs.	HTML	Excel
CPI / CPL (Cost Per Inquiry / Cost Per Lead) Breakeven ROI Calculator	Use this Cost Per Inquiry (CPI) / Cost Per Lead (CPL) Breakeven Marketing Calculator to determine the breakeven and CPI / CPL for your B2B or B2C direct response campaign.	HTML	Excel

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
Single Variable Breakeven ROI Calculator	Use this tool to analyze the profitability of a campaign based expected response rate. The breakeven sensitivity analysis computes the revenue and profitability of the campaign at different levels based on varying a single variable, the overall response rate.	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
Inquiry / Lead Flow Calculator Based on Average Order Value	Use this tool to calculate the size of your marketing campaign and the number of leads that you need to generate from the campaign in order to achieve the desired gross revenue for the campaign based on the average transaction value.	HTML	Excel
Campaign Response Rate Calculator (Based on Gross Margin Objective)	Use this calculator to determine the response rate and sales leads required to achieve a desired profit percent from the program.	HTML	Excel
Lead Generation Calculator by Media Type	Use this pro forma Breakeven Analysis - Lead Generation Campaign BE Marketing Calculator to determine the breakeven percentage and inquiries or leads required based on a desired cost per lead / inquiry (CPI / CPL) for your direct response B2C or B2B marketing campaign.	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
Advertising Appeals Checklist Tool	To successfully communicate with the buyer (business or consumer), advertising must appeal to the individual's needs, wants, desires, hopes and ambitions. In developing advertising strategies, use this checklist to select appeals currently used by you and your competition, and then check off appeals you might consider using in the future.	HTML	Word
Advertising Planning Checklist Template	Use this checklist to make sure you have covered all aspects of your advertising (marketing) campaign from planning to execution.	HTML	Word
Advertising Concept Evaluation Tool	Use the advertising concept evaluation tool to compare advertising concepts based on all the factors that you must consider in developing your advertisements.	HTML	Excel
Advertising Effectiveness Checklist	The Advertising Effectiveness Tool is a checklist of all the factors that you must consider in developing your advertisements. There are 74 factors on which to evaluate your advertisement.	HTML	Excel
Communications Strategy Input Brief Template	Use this template to prepare your overall communications strategy, objectives and tactical direction. It guides you through outlining and addressing the strategic issues involved in developing a marketing communications campaign.	HTML	Word
Marketing Communications (Content Marketing) Plan Template	Use this template to layout your detailed communication plan, activities, and budgets for new customer acquisition, customer retention and reactivation of lost customers.	HTML	Word
Message Planning Template	This tool will help you plan your content and marketing communications	HTML	Word

strategies, tactics, activities and messages for each of the target markets (and personas) that you are pursuing in this planning period and the opportunity ($'s) that exist for your organization in that target segment.

Creative Brief Template	Use this template to prepare the creative strategy, objectives, and activities that are required to support marketing communications activities. A creative brief defines your project in such detail that everyone involved on the project will have a clear understanding what the end product is intended to be and what it's intended to accomplish from a marketing perspective.	HTML	Word
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

Direct Marketing Plannning Tools Back to Top

Direct Marketing Campaign Planning Guide & Template	Use this guide and template to plan your direct marketing campaign, which may include one or more tactics or be a fully integrated direct marketing campaign. Each section includes instructions to guide you through the planning process and details each aspect of the campaign.	HTML	Word
Direct Marketing Program Production Cost Estimator	Use this tool for computing the per thousand cost for any direct mail campaign, whether it is a postcard, self-mailer, brochure, catalog, a dimensional mail package with free gift/premium included, or a solo mail package in flat rate envelop.	HTML	Excel
Direct Marketing Campaign Breakeven ROI Calculator by Media Type	Use this tool to run the numbers on a direct-mail campaign. The tool includes a breakdown of gross margin of the product being sold, the cost of the direct mail piece, and an analysis of the profit and break-even point.	HTML	Excel
Direct Marketing Campaign Media Level Breakeven Calculator	The Breakeven - Media Level Pro-Forma Marketing Calculator will help you learn immediately if your product can make money in a direct marketing campaign in print, catalog, or email media.	HTML	Excel
Telemarketing Campaign Breakeven ROI Calculator (Known Revenue Goal)	Use this tool to calculate the breakeven and ROI for an outbound telemarketing campaign based on achieving a specified revenue target for the campaign determined by the average transaction value and resulting number of sales (closes) required.	HTML	Excel
Telemarketing Campaign Breakeven ROI Calculator (Known Contact Universe Size)	Use this tool to calculate the breakeven and ROI for an outbound telemarketing campaign based knowing the exact size the potential audience that you will be contacting during this campaign. The "known universe" or "# of total contacts for the campaign" is the key variable.	HTML	Excel
Direct Mail / e-Mail Testing Financial Analysis Tool	Use the Mail Testing Financial Analysis marketing calculator to help you determine acceptable response levels for a test direct mail or email campaign.	HTML	Excel
Direct Mail Marketing Campaign Plan Project Template	Use this Gantt Chart template to layout your direct 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 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	

Digital & Social Media Marketing Tools Back to Top

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
Email Campaign Monthly Lead Flow Calculator	Use this tool is to determine what you need to mail per month to generate a given revenue objective for an email campaign. It works for all types of business-to-business and business-to-consumer email campaigns.	HTML	Excel
Email Campaign Profitability Assessment Tool	Use this E-mail Campaign Revenue & Profitability Assessment Tool to compute the number of completed responses you need to achieve breakeven and give you the ROI for the campaign based on the values you entered.	HTML	Excel
Pay Per Click ROI Breakeven Calculator	Use this Pay-per-click (PPC) Advertising Breakeven & ROI Calculator to calculate the breakeven and ROI for Pay-per-click advertisements.	HTML	Excel
Website ROI Breakeven Calculator	Use this Website Return on Investment & Breakeven Calculator to compute your ROI and breakeven for your website, based on traffic, operating and promotional costs. Enter your monthly traffic figure, the cost of maintaining and promoting the site during a month, the monthly	HTML	Excel

	number of inquiries at your site and the conversion rate of inquiries to buyers.		
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
Social Media ROI Breakeven Calculator	The Social Media Marketing ROI Breakeven Calculator is flexible, and it's designed to help you put an ROI formula to work for your brand in the way that makes the most sense for you.	HTML	Excel
Social Media Campaign ROI Breakeven Analysis Tool	These calculators include the key metrics we think are imperative to gauging your social media presence. The calculator takes into account your overall investment and your output on all of your social channels. The calculator is flexible, and it's designed to help you put an ROI formula to work for your brand in the way that makes the most sense for you.	HTML	Excel

Event Trade Show Marketing Tools

Trade Show Event Attendance Calculator	Use the Event / Tradeshow Attendance Calculator to help you calculate the potential audience or buyers that will visit your organization at an event or conference. It will help you in planning your staffing, marketing collateral and incentives requirements for the event.	HTML	Excel
Trade Show Event Breakeven ROI Calculator	Use the Tradeshow ROI & Breakeven Calculator tool to calculate the breakeven and ROI for a trade show, event or conference, with or without the costs associated with having a booth at the event.	HTML	Excel
Event Marketing Brief Template	Use the event marketing brief template to help you prepare an event brief for a specific business show or event.	HTML	Word
Event Planning Checklist Template	Use this 14-page template will guide you through every activity necessary to execute an event, conference or trade show. Sections in the template include: starting checklist, accommodations, transportation, registration, speaker, meeting facilities, speakers, entertainment activities, and more.	HTML	Word
Marketing Seminar/Webinar Plan Project Template	Use this Gantt Chart template to layout your marketing seminar (webinar) 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 Event Planning Project Template - GANTT Chart	Use this Gantt Chart templat to layout your event marketing 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

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 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 elminate 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	Use this Excel Gantt Chart and budget template to layout your new	Excel	

Budget Template & GANTT Chart	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 eleminate or add tasks and set up the appropriate timing and also the persons responsible for each task. This template runs in 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 eleminate 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 eleminate 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
Sales Force Sizing Tool	Use the "Sales Force Sizing Tool" to help you determine the optimum size of your sales team based on the number and types of customers/prospects that you have, the frequency of calls that must be made to them, and the percentage of time that salespeople can devote to actually making calls on customers/prospects.	HTML	Excel
Sales Lead Flow Calculator (Based on Revenue Objective)	Use this tool to calculate the total leads needed in your pipeline to hit a given revenue target for a specific period. This Sales Leads Pipeline Calculator tool calculates the sales leads needed in the pipeline to achieve a given revenue target for a specific period based on the values entered into the input boxes on this tool. The computations are tied to a specified period and not a specific marketing program or campaign.	HTML	Excel (Basic) Excel (Advanced)
Sales Opportunity Assessment Tool	Use this "Sales Opportunity Assessment Tool" to evaluate each sales opportunity to determine if it is a "Win-Win," "Winnable" or "Worth winning." Why use this tool? The underlying purpose is to help better allocate your resources to sales opportunities that fall into the aforementioned quadrants, rather than spending time, money and other resources on opportunities that will not convert or take too long to convert to a sale.	HTML	Excel
Sales Prospecting Activity Rate Calculator	Use this Sales Prospecting Activity Rate Calculator to compute the number of calls to prospects that sales representatives need to make a week in order for your company to achieve its annual sales goal.	HTML	Excel
Sales Territory Call Planning Tool	Use the "Sales Territory Call Planning and Scheduling Optimization Tool" to will help you conduct "what-if" analysis for optimizing your sales coverage for either a direct sales force that has face-to-face contact with customers / prospects or a tele-sales salesforce based in a call center. The tool will calculate the expected gain or loss in closes, revenues and profits based on the variables that you enter.	HTML	Excel
Strategic Account Planning Brief Template	Use this template to develop your long term sales (account) plans for each of your prospect or client (customer) account for your sales organization. This plan is a way of organizing and managing you client account plans so that you can optimize the services and products that are offered to them.	HTML	Word
Account Executive Sale Plan Template	Use this template to develop your account executive's sales account plans for each of your prospect or client (customer) accounts for each of your sales associates in your sales organization.	HTML	Word
Sales Leads Flow Planning Calculator (Based on Sales Cycle)	Use this Sales Lead Flow Calculator to calculate the number of leads that you need to have in the pipeline for each sales executive (rep) at the beginning of a sales cycle in order to achieve the desired gross revenue for the period based on the number of account executives and the average transaction value.	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
Direct Marketing Tutorial	This tutorial is an introduction to direct marketing and covers direct marketing in all channels including digital. It covers all aspects of direct marketing from strategies to offer development and how to use it in the different channels and media. It covers operations and creative development. It also contains a section covering catalog marketing.	Zip File