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Powering Businesses. Creating Jobs.



# MARKETING PLAN ASSESSMENT

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**Need assistance? Reach out to our team**

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**We work from Monday to Friday 10 a.m to 6 p.m**

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# About Marketing Plan Assessment

The Marketing Plan Assessment is designed by Marketing experts after analyzing hundreds of marketing plans. It takes about 5-10 minutes to take this assessment. The assessment helps in analyzing seven important components of any marketing plan which are as follows:

1. Customer Segmentation
2. Competition Analysis
3. Product Positioning
4. Pricing
5. Promotion
6. Place of Business
7. Packaging / Marketing Collaterals

## Who can use Marketing Plan Assessment?

Any business owner can take this assessment to identify the areas of improvement.

## Steps to use Marketing Plan Assessment

- The assessment includes 25 questions.
- The answers to these questions are either Yes or No.
- For each Yes you get 4 points and 0 points for No.
- Calculate the score for each section by multiplying the number of Yes by 4.
- Copy the section scores to the marketing plan scorecard.
- Add the section scores to get your final score.
- Use a Red and Green highlighter to identify the improvement areas.

## 1. Customer Segmentation

Customer segmentation is the practice of dividing a customer base into groups of individuals that are similar in specific ways relevant to marketing, such as age, gender, interests and spending habits.

Information such as a customers' demographics (age, race, religion, gender, family size, ethnicity, income, education level), geography (where they live and work), psychographic (social class, lifestyle and personality characteristics) and behavioral (spending, consumption, usage and desired benefits) tendencies is taken into account when determining customer segments.

**Get your 'Customer Segmentation Score'**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 1 | **Have you decided on your target customer segment?** Target Customer Segment: Customer segmentation is the process of dividing customers into groups based on common characteristics. For example, Maggi is marketed to young mothers. | |
| 2 | **Have you identified the needs of the target segment?** Target Segment Needs: It is based on differentiated, validated needs that customers express for a specific product or service being offered. For example, young mothers need a quick, tasty snack for their children. | |
| 3 | **Have you thought about why the target segment would pay for your product or service?** Pay for Product/Service: Customers pay for the derived value/benefit. For example, "2 minutes" snack. | |
| 4 | **Have you thought about what could stop them from being your customers?** What would make them not buy?: For a number of factors like income, spending capacity, competition, location. For example, many mothers today prefer "healthy snacks". | |
| **Score** | | |

## 2. Competition Analysis

Competition analysis is the process of identifying your competitors and evaluating their strategies to determine their strengths and weaknesses relative to those of your own product or service.

A quick and easy way to compare your product or service with similar ones in the market is to make a competition grid.

- Down the left side of a piece of paper, write the names of four or five products or services that compete with yours.
- Across the top of the paper, list the main features and characteristics of each product or service.

A glance at the competition grid will help you see where your product fits in the overall market.

**Get your 'Competition Analysis Score'**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 5 | Have you **identified your competitors** and listed their USPs and Positioning?<br>**Competitive analysis:** Find out what your competitors are doing, their products, USPs & pricing. | |
| 6 | Is the market crowded with the **competition?**<br>**Competition:** Too many competitors limit your business growth. | |
| 7 | **Have you studied your competitor's promotion strategy?**<br>**Promotion: It helps in designing your marketing strategy.** | |
| 8 | **Have you studied your competitor's pricing strategy?**<br>**Pricing: It helps in formulating your pricing strategy.** | |
| **Score** | | |

## 3. Product Positioning

Positioning is where your product or service fits in the marketplace. It is a strategic exercise that defines what makes your product unique and why it is better than alternative solutions.

The product positioning exercise leads to a brief positioning statement that describes your target audience, what sets your product apart, and why customers should care about it. Here is an example of a positioning statement template:

For [group of users] that [need/want], [company/product] is a [category/solution] that uniquely solves this by [benefit].

**Get your 'Product Positioning Score'**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 9 | Have you finalised your '**Hero Product or Service**'**?**<br>**Hero Product:** Typically, customers know your business for one or a few products (though you may be offering many products). For example, McDonald's is known for 'burgers' and Pizza Hut for 'pizzas'. | |
| 10 | Have you decided on your **( Unique Selling Proposition)?**<br>**USP:** USP is the unique benefit exhibited by a product that enables it to stand out from competitors. For example, USP of "Dominos" is quick delivery, whereas USP of Pizza Hut is "restaurant dining". | |
| 11 | Is your product/ service and benefit **differentiated** from competitors USP/ Benefit?<br>**Differentiated USP:** Should be unique for the customers to set expectations right about your offerings. | |
| 12 | Can you define your **product's benefit in one line?**<br>One line product description: It helps people identify a word/attribute with your brand. For eg: 'Daag Achche Hai' instantly helps people connect with Surf Excel. | |
| **Score** | | |

## 4. Pricing

Pricing is the process whereby a business sets the price at which it will sell its products and services, and maybe part of the business's marketing plan. In setting prices, the business will take into account the price at which it could acquire the goods, the manufacturing cost, the marketplace, competition, market condition, brand, and quality of a product.

Pricing and price of a product or service are two different things. While the price of the product is a monetary value; pricing is the method to arrive at that value.

**Get your 'Pricing Score'**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 13 | Is the pricing of your product/ service aligned to the **perceived value?**<br>**Perceived Value:** Customers think of a product as Premium, Value for Money or Cheap. For example, the iPhone has a 'Premium' perception, Motorola phones have 'Value for Money' perception. | |
| 14 | Is the pricing of your product/services aligned to the **spending capacity** of your customers?<br>**Spending Capacity:** When Tata Nano was launched, Tata Motors wanted to target 2 wheeler buyers. They had a pricing strategy to attract that segment | |
| 15 | Is the price of your product **competitive?**<br>**Competitive Pricing:** Customers compare prices from various providers before finalising their order. | |
| 16 | At any point, have you thought about the pricing structure which may include **offers,** discounts, referral schemes, etc?<br>**Offers:** Offers, discounts, referral schemes help in increased sales and also help in brand recognition within your TG. | |
| **Score** | | |

## 5. Promotion

In marketing, promotion refers to any type of marketing communication used to inform or persuade target audiences of the relative merits of a product, service, brand or issue.

There are several types of promotions. Above the line, promotions include advertising, press releases, consumer promotions (schemes, discounts, contests), while below the line include trade discounts, freebies, incentive trips, awards and so on.

**Get your 'Promotion Score'**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 17 | Have you decided the **medium and channels** of promotion?<br>**Medium/ Channel of Promotion:** There are many mediums of promotion, for example, print, outdoor, events, online, etc. Here's an exhaustive but not a complete list. You should select mediums that your target audience visits/uses. | |
| 18 | Have you decided the **message** for promotion?<br>**Message for Promotion:** Message for promotion is the content and theme you want to use. For example, you may want to say "Try it once". | |
| 19 | Have you tried **changing the messaging** in your promotions and analysed its impact on sales?<br>**Experimenting with Message:** You would not know what message resonates with your customers until you try a few. | |
| 20 | Have you re-visited your promotions strategy with respect to the **market scenarios?**<br>**Market Scenarios:** How you would react to new competition, new product or aggressive pricing by competition. | |
| **Score** | | |

## 6. Place of Business

An establishment's principal place of business is the primary location where it's business is performed. It may be a shop, an office, a factory, a warehouse, etc.

For businesses that expect customer footfall, the place of business is more important than business that deals with other businesses (like trading).

**Get your 'Place of Business Score'**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 21 | Is your business<br>located in a **prominent location?**<br>**Prominent Location:** For businesses that expect customer footfall, prominent location are areas where there is a regular flow of customers, for example, near educational institutes, in shopping malls, shopping street etc. For business that deal with other businesses (like trading ) prominent space could be commercial office locations. | |
| 22 | Is your place of business easily **accessible?**<br>**Accessible:** Locations connected with Public transport like buses, trains, auto rickshaws. | |
| 23 | Is the place of business prominently **visible** with clear hoardings, signages, boards, etc.<br>**Visibility:** Hoardings and other signages help customers locate your business easily. | |
| **Score** | | |

## 7. Packaging/ Marketing Collaterals

Packaging means enclosing or protecting products for distribution, storage, sale, and use. It also refers to the process of designing, evaluating, and producing packages.It can be described as a coordinated system of preparing goods for transport, warehousing, logistics, sale, and end-use.

Marketing Collateral refers to a collection of media items that are used to support the sales of products and services and includes items such as brochures, catalogues and other sales support tools.

Note:
For this section, if your business is manufacturing products that have tangible attributes (like size, color, weight, volume, smell, taste, touch, quantity, or material) consider packaging

If your business is providing “Service” or “Trading” consider collaterals.

**Get your ‘Packaging/ Business Collaterals Score’**

| Sr. No. | Questions | Yes / No |
|---|---|---|
| 24 | Is the packaging of your product/collateral for your service **at par** with the industry standards?<br>**Quality:** Packaging protects the product and bad packaging may spoil the product. For example, packing juices in tetra pack preserves them for longer. | |
| 25 | Is the packaging of your product/collateral for your service as **appealing** and does it stand out from the competition?<br>**Appeal:** Quality of packaging impacts the sales and branding. | |
| **Score** | | |

# Marketing Plan Scorecard

| Marketing Plan Elements | Score | Improvement Areas |
|---|---|---|
| 1. Customer Segmentation | | |
| 2. Competition Analysis | | |
| 3. Product Positioning | | |
| 4. Pricing | | |
| 5. Promotion | | |
| 6. Place of Business | | |
| 7. Packaging / Marketing Collaterals | | |
| **Total Score** | **← Add 1-7 here. Score is out of 100** | |

***Note:*** *Color Red if Score <8, Green Otherwise. The Rows in Red need immediate attention.*

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Thank you so much for choosing our checklist!
We genuinely hope it becomes your guiding star on your exciting journey into the world of entrepreneurship.



Wish you All the Best for your journey!

Should you require any further assistance, please feel free to reach out, and we will be delighted to assist you!

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