



Please review the items below and specify whether they are in place and satisfactory, needing review, or missing entirely. Then place a priority based on your assessment. Once complete, [schedule your free consultation with RISE](#) and we'll offer our recommendations.

ITEM	COMPLETE & SATISFACTORY ✓	COMPLETE BUT NEEDS REVIEW ✓	MISSING OR INCOMPLETE ✓	PRIORITY This Month, Quarter, Year, Later?	OWNER Internal staff, RISE, or other vendor
IDENTITY					
Clear Product/Service Message					
Logo And Branding					
Tag Line(s)					
Audience Segmentation & Messaging					
Competitive Analysis					
Primary Calls to Action/Offers					
CAMPAIGN PLANNING & MANAGEMENT					
Corporate Strategic Marketing Plan & Calendar (Weekly, Monthly, Annual Scheduled Tasks with How-To):					
Marketing Tool Prioritization, Development & Implementation Plan					
Sales Process, Policy & Scripting					
Customer Loyalty/Testimonial Plan					
Content/Optimization Marketing Plan & Calendar					
Strategic/Institutional Partnership & Affiliation Plan					
Traditional Paid Advertising Plan & Calendar					
Online Paid Advertising Plan & Calendar (SEM, SMM, Ad Networks, Display)					
Media Relations Plan & Calendar					
Social Media/Reputation Management Plan & Calendar					



MARKETING PLAN ASSESSMENT

ITEM	COMPLETE & SATISFACTORY ✓	COMPLETE BUT NEEDS REVIEW ✓	MISSING OR INCOMPLETE ✓	PRIORITY This Month, Quarter, Year, Later?	OWNER Internal staff, RISE, or other vendor
TOOLS					
Website Development or Redevelopment & Optimization					
Content Development, Including Corporate Blog Setup & Optimization					
Premium Content in Place (White Papers, How-To Guides Email-Acquisition Campaigns)					
Video Content Production, Syndication & Optimization					
Podcast Content					
Automated Lead Nurturing					
Customer Satisfaction Survey/Owner Assessment And Evaluation					
Weekly or Monthly Client Retention/Communication Platform					
Webinars (Script and Presentation)					
Trade Shows & Hosted Events					
Branding Guidelines					
Print/Electronic Collateral for Each Target Audience					
Direct Marketing Creative & Production with A/B Testing					
Third-Party Referral Program in Place					
Customer Referral Program in Place					
Customer Testimonial Acquisition Programs (Including Online Reviews)					
Regular Press Releases & Media Outreach					
Thought Leadership Articles (By-Lined)					
Thought Leadership Speaking Pitches					
Annual Business, Industry & Local Award Applications					
MEASUREMENT					
KPI Determination					
Measurement Platforms/Tools					
Staff KPI Communication Plan					
Website Analytics Reporting					
Reputation Management Monitoring					
Monthly Executive Marketing Report					



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OPERATIONS (MARKETING-RELATED)					
Corporate Operational Annual Plan & Calendar					
Call Processing & Help Desk Setup					
Service Delivery Platform (Additional Technical/Software/Automation Needs?)					
Scalability Plans For Each Long-Term Growth Stage					
Corporate Culture Initiatives: Service Excellence, Professionalism, Transparency					

NEXT STEPS:

1. Identify, then prioritize, critical areas.
2. Attach timeframes and budgets to each initiative.
3. Determine teams and resources to implement (RISE or other).

RISE Programs help you grow faster, with a world-class team that can plan, prioritize and implement every item above faster and more affordably. RISE clients avoid reinventing the wheel and benefit from decades of experience. The result—more effective initiatives that cost less and allow you to respond and compete faster.

WE LOOK FORWARD TO HELPING YOU RISE.

[Contact us today.](#)