



## Marketing Checklist

E	NE	Strategic Documents	E	NE	
		Strategic Plan			Flyers
		Marketing Plan			Mailers / Inserts
		Brand Manual			Posters
		Website User Guide			
		Donor System Guide			<b>Business Forms</b>
		Event System Guide			Registration Forms
					Invoices, Statements, etc.
		<b>Written Content</b>			
		Mission Statement			<b>Website</b>
		Vision Statement			Organizational Website
		Brand Promise			Microsites and Landing Pages
		Brand Values			
		Brand Attributes			<b>Stationery Items</b>
		Brand Personality			Email Signature
		Boilerplate Language			Business Cards
		Grant Application Language			Letterhead
		Directory Listing Language			Second Sheet
		Online Listing Language			Memo Sheets
					Note Cards
		<b>Logos</b>			Mailing Labels
		Organizational Logo			# 10 Envelope
		Division Logos			9 x12 Envelope
		Program Logos			Envelopes (various sizes)
		Sponsor Logos			Other Stationery Items
		Social Media Avatars			
		Other Logos			<b>Membership Materials</b>
		Online Logo Archive			Membership Brochure
					Renewal Forms & Invoices
		<b>Typography</b>			Membership Card
		Typefaces			Welcome Kit
		Typeface Usage Guidelines			
					<b>Fundraising Materials</b>
		<b>Colors</b>			Fundraising Brochures
		Colors			Solicitation Letters
		Color Usage Guidelines			Direct Mail
		Departmental Branding			Annual Appeal
					Capital Campaign
		<b>Photography</b>			Event Marketing
		Photography			Planned Giving Materials
		Illustration			Sponsorship Information
		Image Archive			Fundraising Advertising
					Email Marketing
		<b>Organizational Collateral</b>			
		Organizational Folder			<b>Publications</b>
		Organizational Brochures			Annual Reports
		Program Brochures			Magazines, Journals
		Flyers			Newsletters
		Posters			Policy Reports
		Postcards / Rack Cards			Books
					Educational Materials
		<b>Program Collateral</b>			Other Publications
		Program Brochures			

E	NE	Email	E	NE	Videos
		Email Newsletters			Client/Customer
		Subscriber Messaging			Donor
					Other
		<b>Presentations</b>			
		Clients			<b>Public Relations</b>
		Donors			Media Kit
		Partners, Others			Media Lists
					Press Release
		<b>Event Promotion</b>			PR Wire Distribution
		Invitations			Social Media Newsroom
		Flyers			Social Media News Release
		Email			Editorial Calendar
		Online Registration			
					<b>Production Request</b>
		<b>Signage</b>			Materials Request Form
		Exterior			Print Quote Request
		Interior & Bulletin Boards			Production Checklist
		Sponsor Recognition			
					<b>Other</b>
		<b>Uniforms</b>			
		Shirts			
		Jackets			
		Hats			
		Name Tags			
		Other			
		<b>Vehicles</b>			
		Delivery Vehicles			
		Vans & Trucks			
		<b>Promotion</b>			
		Posters			
		Online Marketing			
		Premiums			
		<b>Advertising</b>			
		Print Advertising			
		Online Advertising			
		Broadcast Advertising			
		Outdoor Advertising			
		Other Advertising			
		<b>Social Media</b>			
		Facebook			
		LinkedIn			
		Twitter			
		Pinterest			
		Instagram			
		Flickr/Picassa/Photobucket			
		YouTube			
		SlideShare			
		Other			

Thank you for downloading the **Marketing Assets Toolkit**. Use the documents in this file to identify, list and evaluate the internal and external components and opportunities of your marketing program.

This page (**Marketing Checklist**) is a starting point to identify your assets. On page 2 (**Marketing Materials Inventory**), list the elements you currently use. On page 3 (**Marketing Materials Assessment**), use the criteria to evaluate the items indicated on page 2.

**Page 1 Key**  
 E: Existent  
 NE: Non-existent

**Page 3 Key**  
 Y: Yes  
 N: No



# Marketing Materials Inventory

No.	Item	Audience	Purpose	Description	Production	Cost	Message	Result	Assessment

# Marketing Materials Assessment

Message	Item 1	Item 2	Item 3	Item 4	Item 5	Item 6	Item 7	Item 8	Item 9	Item 10
Is the audience and the purpose of the piece clear (does it educate, inform, motivate, persuade, etc.)?										
Is there a compelling headline or message that appeals to the audience?										
Is the content relevant to their needs?										
Is the message compelling (evoke an emotional response, inspire to action)?										
Is the length of the text appropriate / not too long?										
Is the text easy to read (are there subheads and callouts)?										
Is the language and tone appropriate for your organization's personality?										
Is the copy free from grammatical and typographic errors?										
<b>Call to Action</b>										
Is it clear what action the reader is supposed to take?										
Is it easy to take that action?										
Does the item include the relevant contact information (phone, email, website, addresses, etc.)?										
Is there consistency in the way the contact information is treated across all materials?										
Are there links to your social media and email newsletter sign up?										
Is there a form or reply card or envelope if necessary?										
<b>Design</b>										
Does the design look professional?										
Does the layout make sense? Is it clear what to focus on? Is there enough white space?										
Can the reader easily find the information they need?										
Are the appropriate images used to convey the message?										
Do the images and graphics evoke an emotional appeal?										
Are the images professional, well lit, cropped appropriately, and /or retouched?										
Do images have photo captions?										
Is the typography consistent (restrained use of fonts)?										
Are your logo and tagline included?										
Are the appropriate sponsor logos and disclaimers included?										
Are logos used in a consistent way with your other materials?										
Is the design and content consistent with your other materials?										
Does the item represent your brand well?										
<b>Production</b>										
Do the production qualities represent your agency in the best way possible? (quality paper, good printing, accurate folding, etc.)?										
Was the cost of producing the item appropriate?										
<b>Results</b>										
Has it been distributed effectively to its target audience?										
What results has this item achieved?										