

# Business Development Checklist

The following list is a logical extension of the "Marketing Mix" pyramid. It is not meant to be an inclusive list for every vertical market and industry; it is to stimulate the background thought process behind strategic business development activities.

The best way to utilize this resource is to think of internal and external sources for these activities, then allocate monetary and labor resources to accomplish your objectives. When plotted against an annual budget model, you can then revise your allocations to meet your monetary budget and establish tactical action steps to complete.

## Strategic Planning:

Revenue Goals  
Marketing Expenses  
Sales Action Plans  
Staffing Guidelines, VAR's

Marketing Plan  
Historic Trends  
Industry Review  
Policies and Procedures

## Competitive Review:

Pricing  
Market Share  
Key Clients  
Positioning, S.W.O.T.  
Literature

## Active Components:

### Direct Sales:

Skills Assessment  
Skills Training  
Establishing Quotas

- Call Activity
- Booking Pace

Account Management

- Territories
- Vertical Markets and Segments

Account Insulation  
Planning  
Scripting  
Administration

- Reporting

### Telemarketing, "Building The Pipe":

Scripting  
Target List Acquisition  
Call Goals  
Account Transfer Procedures  
Administration

- Reporting

## Active/Passive

### Web Site:

Register Domain Name  
Establish Communications Goals  
Site Mapping, or Architecture  
Vendor Review & Selection  
Production Review, Graphics & Layout  
Select Internet Service Provider  
Measurement of Results

### Establishing Corporate Identity:

Logo Stationary, Business Cards  
Corporate Brochures  
Broadsides  
Catalogs  
Data Sheets  
White Papers  
Evaluate Need for Toll-Free Service

## Passive Components:

### Direct Mail:

Message Vehicles -

- Newsletters
- Personalized Form Letters
- Postcards
- Mass Market Territory Mailers
- Product Updates
- Direct Response Cards
- New Releases

Mail House Evaluation  
List Management  
Direct Sales & A/R Databases  
List Brokers  
Web Database  
Fax Blast Management  
E-mail Scheduling (to Nicknames Only)

### Advertising/Promotions:

Advertising by Segment Goals & History

- Print Newspapers
- Magazines
- Trade Publications & Associations
- Directories & Registries
- Yellow Pages
- Internet Banner Ads
- Airport Diaramas
- Billboards & Signage
- Fleet Vehicle Signage
- Trade Shows - Booth Design, Placement, Giveaways
- Production & Placement Considerations

Design, Layout, Media Placement  
Photoshoot Coordination  
Seasonal Promotions  
Client Specials

### Public Relations:

Corporate Fact Sheet  
Executive Profiles (Bio's)  
Press List Acquisition  
Release Submission Schedule  
Key Contact Follow Up