

## Marketing Checklist June 2014

Activities	Frequency	Timing
Strategic & Operating Plan	Annual	By 7/15
- Complete Environmental Analysis/SWOT Analysis		
- Clarify goals and objectives		
- Discuss chapter vision and mission		
- Identify target audience(s) and their needs		
- Draft of written Marketing plan		
o Includes emails, advertising & promotions, targeted companies, mailings, articles, etc.		
- Marketing Plan review & Board approval		
- Develop Budget to support the Marketing Plan		
Execute the Plan		
- Create program year flyer and mail to members*	Annual	By 8/15
- Add PDM schedules in Partner Connect		
- Create Education year flyer and mail to members*		
- Add Education Open class schedule in Partner Connect		
- Develop press release for new Board of Directors and put in local business paper	Annual	By 8/1
- Create letters and mail to targeted new customers	Quarterly	As defined in Plan
- Get PDM announcements in local publications	Monthly	2 weeks prior to event
- E-mail company coordinators for each PDM	Monthly	
- Provide updated information or Marketing collateral to Webmaster	As needed	
- Email blast to all members on next PDM	Monthly	3 weeks prior to event
- Company visits to sell APICS	As needed	As defined in Plan

*\*Working with the respective Directors*