Taking Stock

Assessing the Condition of Your Marketing Foundation

Build it Bright!

Crafting Your Solar Marketing Program

Presented by
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Working with Energy Trust of Oregon

Taking Stock Interactive Tool

This PDF tool is designed to be completed alongside the Taking Stock: Assessing the Condition of your Marketing Foundation webinar delivered live on Thursday, January 28, 2016 at 11am PST.

This is part of the **"Build it Bright: Crafting Your Solar Marketing Program"** Series brought to you by Glenna Wiseman of Identity3 working with Energy Trust of Oregon. This tool and the accompanying webinar are designed to help you determine the current condition of your solar marketing program. Find more information about this training series and links to pre-recorded webinars at www.energytrust.org/BusinessDevelopment.

Use hashtag **#MarketingSolar** to join the conversation on Twitter.

1 The 5 - 10 "Triumphs" of my marketing program last year were:

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2 Some of the most important factors relating to these marketing successes include:

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3 The 5 – 10 “Downfalls” of my marketing program last year were:

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4 Some of the most important factors contributing to my marketing 2015 disappointments include:

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5 The 5 – 10 primary goals we currently have for 2016 marketing include:

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Marketing Assets Inventory

6 Brand/Identity: A brief brand/identity checklist:

	Yes	No
We have a current brand guide		
We have recently done a competitive landscape review		
We understand our three top value propositions (strengths)		
Our top value propositions are consistently communicated		
We have a current mission statement		
We understand the uniqueness of our company culture and communicate it consistently		

7 Brand/Identity priorities for this year include:

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8 Graphics: A brief graphics checklist:

	Yes	No
Our logo accurately reflects our brand		
Our logo is responsive		
We have a current style guide for the company		
We implement the style guide throughout the company		
The style guide is used by our consultants and outside help		
All of our online assets (website, social media) are consistent graphically		
We use a standardized email signature throughout the company		
Our company email signature is regularly updated by marketing		
All of our photo and graphic assets are cataloged in one place		
We have a systematic process for securing project photos		
Our team follows the process for securing project photos		

9 Graphic priorities for this year include:

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10 Collateral Inventory: A brief collateral checklist:

	Yes	No
We have an up-to-date brochure		
Our brochure is in an email/digital version		
Our brochure is available for download on our website		
We have brochures targeted to each of our key customer types		
We have an up-to-date SOQ (statement of qualifications) for commercial, public sector and other nonresidential work		
We have current case studies for commercial work		

11 Collateral project priorities for this year include:

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12 Website: A brief website checklist:

	Yes	No
Is brand new!		
Is an old version that needs updating		
Communicates our top three competitive strengths		
Supports our brand visually		
Consistently presents our phone number for ease of use		
Has all our social media accounts prominent with links that work		
Speaks to the customer clearly about the **benefits** of working with us		
Showcases testimonials		
Showcases projects by type in an attractive format		
Is mobile responsive		
Is SEO (search engine optimization) enhanced		
Has a blog which is regularly updated		
Has landing pages for our online digital ads		
Captures leads via a CRM (drops contact info into CRM)		
Is easy to update internally		
Is easy to navigate		
All links are working properly		
Has Google Analytics embedded		
We have an newsletter subscription opt-in on the website		
We have all the hosting and admin login credentials in one place		

13 Website priorities for this year include:

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14 Social Media: The social media sites we have are:

		Social Media Sites are Updated			
		Daily	Weekly	Monthly	Yearly
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15 A brief social media checklist:

	Yes	No
Our social media icons are consistent with the website		
Our social media profiles are consistent with the website		
We have consistent graphic approach on social media		
We have a systematic way we funnel social media material		
We have identified key advocates and why we are talking to them		
We know and talk with important press contacts on social media		
We measure our social media results		

16 Social Media priorities for this year include:

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17 Public Relations: A brief public relations checklist:

	Yes	No
We have a comprehensive PR strategy we execute		
We have a PR strategy together for our firm		
We have a list of press contacts we target		
We have an updated “About Us” statement on our press release		
We coordinate PR and social media activities		
We support our commercial clients with PR		
We carry our press releases and in the news mentions on our website		
We measure our PR results		

18 Public relations priorities for this year include:

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19 Client Related: A brief checklist related to client information:

	Yes	No
We have developed client personas for our key customer types		
We keep and monitor client type data		
Our client personas are the basis of our marketing strategy		
On social media we use our persona info to target key demographics		
We use our client personas to create on target content		
We understand our client buying questions and answer them through content		
We have a systematic referral program		
We track our referral program results		

20 Client related priorities for this year include:

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21 Lead Tracking and Return on Investment Tracking:
A brief checklist related to tracking return on investment (ROI):

	Yes	No
We have identified key performance indicators and metrics for our marketing program		
We review our metrics monthly		
We understand how much we spend on average for each lead		
We use a CRM (customer relationship management) tool		
We know which lead types generate the highest conversion rates		
We track how long our sales team responds to a new lead		
We have identified and track each phase of a lead conversion		
We track our referral program results		
We track our average customer acquisition cost		

22 Lead tracking and ROI priorities for this year include:

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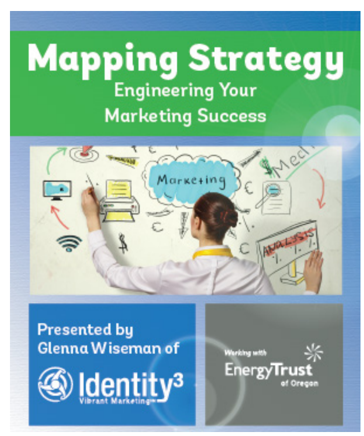
Up Next in the "Build It Bright" Series

Listen to the Latest Podcast:

The Effective Use of Graphics in Marketing Solar

Continue onto the Next Webinar!

Mapping Strategy: Engineering Your Marketing Success
live on Thursday, February 25th, 11am PST



Questions?

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