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*Marketing
/management/*

MARKETING CONTROL SYSTEM - MCS ^{1/}

prepared by

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MARKETING CONTROL SYSTEM

- M.C.S. -

1. Purpose of the Marketing Control System - MCS - (1)

The action and decision of the Marketing Management contribute to the success or failure of the Enterprise. In his area of responsibility, the job of the Marketing Manager is to seek ways and planning strategies for obtaining improvement of marketing performance and profitability. To this purpose he applies a series of checklists, based upon the accumulation of market knowledge and technical experience, to assess present conditions and forecast future opportunities and developments.

The Marketing Control System (M.C.S.) is a marketing management tool composed of a strategic checklist, concisely and systematically developed to assist marketing managers to draw conclusions and to planning action, according to factual conditions and ascertained needs.

The primary aim of the M.C.S. is to guide and stimulate Marketing Management's thoughts and aid perspective decisions which will, by their very nature, enhance the chances of success and prosperity of the Enterprise.

2. Instructions for the use of the M.C.S.

The M.C.S. comprises a series of concrete marketing questions, which should be analysed and answered, at regular intervals. Many of the questions require careful assessment, and consultation with other operational Managers (Production, Finance, Administration, etc.) before a decision is reached. The M.C.S. has been

(1) The M.C.S. was created in 1968, by Prof. S.P. Padolechia for the use of students of the European Marketing Institute.

designed to make it possible to examine the reality of the marketing context and to enable Marketing Managers to work on them, at any time and in any place.

The M.C.S. contains a number of points or questions to be considered, and by checking the columns on the right it should be ascertained if and what action was taken or if further action is required. The following headings are used:

N/A = Non-Applicable	PAR = Partial action taken
YES = Action taken	ACT = Action to be taken <u>im</u> mediately
NO = Action not taken, or not to be taken	? = To consult if action should eventually be taken

Where headings other than these are used, they are explained accordingly.

The M.C.S. should be processed at least every three months. The answers should be thoroughly reviewed, to fully ascertain if the original conclusions were correct. In certain circumstances specific pages of the M.C.S. should be allocated to other managers or/and subordinates for completion, discussion and action.

At the top of every checklist are cross references for transfer of items requiring further attention. The series of tables from MCS 29 to 35 should enable Marketing Managers to speedily analyse the type of action required and the impeding factors which must be overcome to achieve the desired objective. They also incorporate a Marketing Planning Schedule for use as and when priorities are established.

The M.C.S. provides Marketing Management with an immediate check upon progress made on each and every activity which was planned or initiated. They can be occasionally used separately as working papers and taken to top management meetings, if necessary, in view of discussing action and plans with colleagues, who should be involved in decisions which still remain to be taken. This will permit to promote greater understanding, co-operation and

a good working atmosphere, at top management and operational levels.

Some items in the checklist, which are not fully applicable today, may well become relevant in future as expansion or changes in marketing conditions take place. In either of these events, the M.C.S. will be a valuable aide-memoire from which to develop strategic plans of action.

	N/A	YES	NO	PAR	?	ACT
1. Expressed as a % of turnover, are the total Marketing costs:						
(a) Increasing						
(b) Static						
(c) Decreasing						
2. If increasing, do we know the precise reason why?						
3. Do we have a breakdown of the increased costs in order to define the specific areas that must be improved?						
4. Are we resigned to acceptance of this higher % of costs?						
5. or have we taken action to reduce it?						
6. If the latter, have we set a firm date by which time improvement must take place?						
7. or further remedial action is to be taken?						
8. What is the average time period before we recognise a consistent upward/downward trend in demand? Number of months: _____						
9. Could we improve upon this time-lag by introducing any rapid form of analysis which would enable us to more rapidly identify trends?						
10. Can we compare current results with those of similar periods in previous years in terms of:						
(a) Total value of sales						
(b) Area sales						
(c) Number and type of units sold						
(d) Value of sales						
11. If no, is our trading likely to suffer in future years due to the lack of this type of information?						

	N/A	YES	NO	PART	?	AND
12. Do we know the number of past profitable accounts which have not traded with us during the past 12 months?						
13. If yes, is the incidence of closed or dormant accounts:						
(a) Increasing						
(b) Static						
(c) Decreasing						
14. If increasing, do we possess firm facts as to the reasons why?						
15. If yes, have we taken corrective action based upon these facts?						
16. Is the rate of opening new accounts adequately compensating for closed or dormant accounts?						
17. If no, should we consider a revision of Marketing policy in order to:						
(a) Regain this lost business						
(b) Prevent the closure of current trading accounts						
(c) Increase the rate of opening of new accounts						
18. Do we know the additional costs and time that could be made available, if necessary, to acquire new business?						
19.and the Marketing functions that would need to be delegated?						
20. Could or should we replace any present member of the staff by a person with experience in Marketing activities?						
21. If no, would it be of benefit to train or acquire such a person to carry out this function?						
22. Do our plans for market expansion include any changes or additions to our present methods of Marketing?						

	N/A	YES	NO	PART	?	ACT
23. If yes, could we confirm now, by experimentation or some other means, that these amendments will obtain the desired results?						
24. If our plans for market expansion are not complete, which of the following could we evaluate to establish the most economic means of attaining our objectives?						
(a) The approximate size and type of promotion required to produce expected results						
(b) and the respective costs thereof						
(c) The total costs of promotional strategies						
(d) The number and/or value of orders required to break-even on that promotional strategy						
(e) Trends in the response rate of promotion						
(f) The average cost of any one call made by a salesman						
(g) The average value of order per call, i.e. weekly sales divided by number of calls						
(h) and the trend of the average value of orders received						
(i) The cost and success rate of telephone canvassing						
(j) The cost and success rate of distribution strategy						
(k) The cost and potential success of outside specialist services to supplement our own Marketing effort						
(l) Ancillary products or services that could be introduced - and the profit margins thereon						
(m) The method and cost of assessing the new business potential on the perimeters of our present area of Marketing						
25. In what order of priority should we obtain information relating to any of the above?						

		MARKET TRENDS				
		GRADING EFFECT	DON'T KNOW			
1. How are we likely to be affected, within the next 12 months, by any of the following changes in our Marketing strategy or within our Market environment?		BAD EFFECT	DON'T KNOW			
		NO CHANGE	DON'T KNOW			
ACT		GOOD EFFECT	DON'T KNOW			
		NON APPLICABLE	DON'T KNOW			
	<u>CHANGES IN:</u>					
	- Needs					
	- Taste					
	- Attitude					
	- Habits					
	- Purchasing Ability					
	- Geographic Location					
	- Packaging					
	- Design of Products					
	- Promotion					
	- Economy					
	- Price					
	- Availability of Supplies					
	- Product Specifications					
	- Name of Product					
	- Methods or Systems of Distribution					
	- Client Service					
	- Materials					
	- Equipment					
		N/A	YES	NO	PART	?
	2. Of the items ticked "Good Effect", have we developed plans to take advantage of the situation?					
	3. Of the items ticked "Bad Effect", have we considered plans to minimize the effect?					
	4. Have we assessed the number of potential new customers entering our market?					
	5. Have we assessed the potential value of "alternative" customers of our product?					

	N/A	YES	NO	PAR	?	ACT
1. Do we acknowledge that our Competitors are striving to improve their methods and take business away from us?						
2. Of which of the following could we be judged superior to our Competitors - by a potential customer?						
(a) Price						
(b) Quality of Product						
(c) Product features						
(d) After sales service						
(e) General efficiency						
(f) Delivery and distribution system						
(g) Advertising						
(h) Promotion						
(i) Credit system						
(j) Quality of salesmanship						
(k) Product image						
(l) Company image						
3. Which items in the "No" or "Par" columns have undergone improvement or revision within the last 12 months? Items: _____						
4. Which items remaining in these columns could or should receive attention now? Items: _____ By whom: _____						
5. Are there any items in the "N/A" column which may become applicable and which should receive attention now? Items: _____						
6. Have any of our competitors recently introduced any new marketing methods, techniques, materials, components or equipment?						
7. If yes, have we assessed the cost and the advantage of introducing any of these ourselves?						

	NO	AY	YES	NO	AY	?	AY
1. Were the following information submitted to management with regularity?							
- Value of orders received							
- Total value of orders in hand							
- awaiting delivery							
- Area sales performance							
- Individual sales performance							
- Analysis of units sold							
- Development annual totals							
- Variances to forecast							
- Number of enquiries received							
- Conversion ratio - initial enquiries to effective sales							
- Number of pending sales							
- Value of pending sales							
- Complaints							
- Volume and value of new customers							
- Production delays							
- Service delays							
- Distribution delays							
- Purchasing delays							
2. What factors prevent from producing larger quantities?							
- Lack of personnel							
- Inadequate distribution system							
- Inadequate market information							
- Lack of co-ordination between production and sales							
- Lack of equipment							
- Other reasons:							

	N/A	YES	NO	PART	?	A/T
3. Are our marketing records sufficiently comprehensive to provide, as necessary, the means for:						
a. Analysis of sales performance						
b. Analysis of area performance						
c. Defining ratio of calls to sales obtained						
d. Defining average number of sales						
e. Defining average value of sales						
f. Forecasting of sales						
g. Analysis of competitive activity						
h. Assessment of market coverage						
i. Assessment of demand growth						
j. Assessment of promotional results						
k. Re-allocation of territories						
l. Identification of "new" or "alternative" customers						
m. Defining our share of the market						
n. Defining trends in market demand						
o. Short and long-term marketing strategy planning						
p. Measurement of distribution channels effectiveness.						
4. Could any of the above listed items be economically introduced?						
If yes, items: _____						

	N/A	YES	NO	??	?	ACT
1. Are our distribution policies subject to <u>annual or periodic review</u> ?						
2. Does our distribution system ensure a minimum of "out-of-stock" condition?						
3. When "out-of-stock" does occur, is our <u>delivery delay period acceptable to the majority of customers</u> ?						
4. Does our method of distribution to <u>maintainance of customers stock-level compare favourably with that of our competitors</u> ?						
5. Do we know the total number of <u>Distributor/ Retail outlets</u> within our area of distribution?						
6. If no, have we set up any recording system which will ultimately provide us with this information?						
7. If no, have we considered any plan to collect such information?						
8. If this information is or record, have we:						
a. Categorized all existing distribution outlets?						
b. Established by <u>criteria, metrics and geographic location</u> those distribution outlets with the highest profit potential?						
c. Directed any special effort towards these distributors and analysed the results?						
d. Clearly defined the specific buying <u>resistances</u> which remain?						
e. Prepared a plan of action to overcome these resistances?						
9. Have we surveyed our distributors to determine their degree of satisfaction with our policies concerning:						
- Credit						
- Delivery system						
- Service						
- Promotion and merchandizing methods						
- Direct assistance						
- Advertising support						
10. If no to the above, should we undertake a survey to test their degree of satisfaction and their reasons of dissatisfaction?						

	N/A	YES	NO	PART	?	ACT
11. Before appointing distributors, have we ascertained that:						
a. Formal distributors contracts are on file						
b. Their area of operation is clearly defined						
c. Sales targets are set						
d. ... or minimum stock levels agreed						
e. If targets are not set, the initial contract is probatory, and will be confirmed subject to results						
f. They do not desire the contract for the sole purpose of restricting sales of our product in their area of operation						
g. The lines carried by our distributors do not conflict with our own						
h. We know the turnover that he obtains on his other lines - and his reason for desiring a further line						
i. Our commission/discount terms are of equal incentive to the other lines carried						
j. We thoroughly investigate their service facilities and verify the number, calibre and experience of their personnel						
12. After appointment of distributors do we:						
a. set up communication procedures to ensure prompt attention to enquiries/ servicing/complaints						
b. ... with a clear understanding that we require feedback on the results of calls						
c. provide adequate training to the distributors' personnel						
d. immediately inform them of additions or modifications of the range of products						
e. that we pay commissions promptly						
13. Do we acknowledge that distributors usually require more motivation than our own marketing personnel?						
14. Do we issue bulletins or newsletters to inform distributors of the progress and successes of our product lines?						

At approximately what level of turnover should we improve/introduce any of the following promotional items?

		NON APPLICABLE				
		POOR				
		FAIR				
		SATISFACTORY				
		GOOD				
ACT	ITEM					
	1. Press Releases					
	2. Press Relations					
	3. Letterheads					
	4. Visiting Cards					
	5. Trade Marks					
	6. Leaflets					
	7. Catalogues					
	8. Direct Mail material					
	9. Posters					
	10. Signs					
	11. Transport: Colour and Message					
	12. Packaging					
	13. Point of Sale Display					
	14. Window and other Display					
	15. Exhibitions					
	16. In-Store Promotions					
	17. Field Sales Aids					
	18. Samples					
	19. Premium Offers					
	20. Ties					
	21. Badges					
	22. Uniforms					
	23. Which promotional items are undergoing improvement now? Number: _____					
	24. Which promotional items are in the process of introduction? Number: _____					
	25. Which promotional items could be improved or introduced within the next 3 months? Number: _____					
	26. Which promotional items are we not applying which would be worthwhile investigating now? Number: _____					

	N/A	YES	NO	PAR	?	ACT
Do our catalogues and leaflets adequately convey the following:						
a. Company's up-to-date image						
b. Modernity of premises/equipment/processing						
c. Depth of our experience						
d. Quality of our techniques/product						
e. Attention to detail						
f. Quality and speed of service						
g. Desire for customer satisfaction						
h. Ability to solve problems						
i. Pricing policy						
j. Range of products						
k. Technical details readily understandable						
l. Areas of distribution						
m. A suggestion to enquire for further details						
n. Space for Distributor's/Dealer's name and address						

	N/A	YES	NO	EAR	?	ACT
1. Have we clearly defined those aspects of the Enterprise and of its products, service, price, etc. which should form the fundamental theme of our promotional campaigns?						
2. Have we identified the "image" we wish to project?						
3. Have we identified the major purpose of our promotional appeal?						
4. Is our promotion strategy designed to:						
- Create interest and enquiry						
- Create immediate sales						
- Remind our name to the market						
- Soften buying resistance						
- Induce the market to experiment our product(s)						
- Foster a desire to change						
- Re-capture lost customers						
- Create new customers						
- Stimulate market to impulse buying from us instead than from competitors						
5. Before approving and launching the promotion campaign do we check that it:						
- Meets customer needs and wants						
- Is effectively carrying the theme						
- Is believable						
- Will capture market attention and interest						
- Will be remembered						
- Will improve our image in the market						
6. Upon receiving enquiries, have we ascertained the form of promotion which may have induced the enquiry?						
7. Do we review our promotional budget at times other than the commencement of the financial year?						

1. On average how would I rate the attributes of my Personnel?		RATING				
		EXCEPTION FROM AVERAGE - NAME	VERY GOOD	GOOD	SATISFACTORY	POOR
ACT						
	a. Loyalty					
	b. Enthusiasm					
	c. Initiative					
	d. Experience					
	e. Integrity					
	f. Self disciplin.					
	g. Determination					
	h. Co-operation					
	i. Ambition					
	j. Efficiency					
	k. Effectiveness					
	l. Leadership					
	m. Application					
	n. Attitude to superiors					
	o. Attitude to subordinates					
		YES	NO	PAR	?	ACT
2. Is there any member of my Personnel that I would not be willing to re-employ?						
3. Have all Personnel been informed, in writing, of the policies and objectives of the Enterprise?						
4. Have all Personnel been informed, in writing, of their specific duties and responsibilities?						

<p>1. On average how would we rate the application of our Personnel and their ability to:</p>		POOR				
		FAIR				
		SATISFACTORY				
		GOOD				
		VERY GOOD				
ACT	EXCEPTION FROM AVERAGE - NAME					
	a. Organise					
	b. Motivate					
	c. Control					
	d. Teach by example					
	e. Instil discipline					
	f. Recruit					
	g. Train					
	h. Analyse performance and correct actions					
	i. Seek advice					
	j. Communicate with superiors					
	k. Conduct meetings					
	l. Negotiate					
	m. Close large orders					
	n. Open new accounts					
	o. Achieve expected results					
2. From study of the above, should training be given?						
3. If yes, should this be Internal?						
4.External course?						
5.Both?						
6. Is there any member of the Personnel who is likely to seek or who should receive additional incentives within the next 12 months?						
7. If yes, was a target of achievement appropriately set?						
8. Is there any member of the Personnel who is likely to be terminated/leaving within the next 12 months?						
9. If yes, do we already have a <u>successor</u> ?						

	NO	YES	NO	NO	NO	NO	NO
1. Do we know the precise qualities and qualifications we seek in a candidate for a marketing post in terms of:							
a. Marketing experience and background							
b. Technical marketing skill							
c. Personality							
d. Ambition							
2. Does our recruitment system attract the type of marketing man that we would wish to employ?							
3. If yes, have we studied the recruitment practices adopted by our competitors?							
4. Do we know why our competitors acquire the type of marketing personnel that we would wish to employ?							
5. Have we recently confirmed that:							
a. Our salary scale is in line with the market?							
b. Our bonus and/or commission structure is an adequate incentive?							
c. Our fringe benefits are of sufficient attraction?							
6. At time of interview do we:							
a. Convey a general air of efficiency and enthusiasm?							
b. Ensure that our method and/or manner does not deter an applicant with good potential?							
c. Sell the right image of our enterprise?							
7. Do we ensure minimum delay between times of application, interviews, final selection and notification?							
8. Have we verified the reasons why previous applicants have rejected the job?							
9. When we employ a new marketing man, have we adequate information as to the total cost of advertising, selection, training, salary and expenses before he starts to produce profitable results?							

	N/A	YES	NO	PAR	?	ACT
1. Is our turnover of marketing personnel:						
a. Higher than in previous years						
b. Approximately the same as in previous years						
c. Lower than in previous years						
2. If higher:						
a. Should we improve our recruitment procedures?						
b. Do we provide sufficient training before seeking economic results?						
c. Should we revise our marketing training procedures?						
d. Do we provide adequate field training?						
e. Have marketing management received adequate instructions on training and motivation techniques?						
f. If yes, are these instructions manualised?						
g. Are we rapidly identifying and correcting specific weaknesses in marketing personnel performances?						
h. Are we providing sufficient motivation?						
i. Should we hold more marketing meetings?						
j. Are our marketing meetings received with enthusiasm?						
k. Are marketing targets attainable by new personnel?						
3. When a member of the staff departs, do we endeavour to obtain their three reasons for leaving?						
4. Is all the marketing personnel "customer conscious" - helpful and courteous at all times?						
5. In general, does the total cost of acquiring new marketing personnel compare favourably with the cost of re-training and motivating low performance old personnel?						

	N/A	YES	NO	FAR	?	NOT
1. In the competition to obtain the services of good marketing personnel, in general do we rate our appeal by comparison to other local companies?						
a. salaries						
b. bonuses						
c. profit sharing						
d. pension scheme						
e. working conditions						
f. working hours						
g. work loads						
h. holidays						
i. amenities/facilities						
j. job security						
k. promotion prospects						
l. general atmosphere						
m. team spirit						

	N/A	YES	NO	PAR	?	ACT
1. Do Salesmen waste Management time by transmitting superfluous and unusable information?						
2. Or, conversely, do not transmit essential information for Management action?						
3. If yes, are we planning to improve our reports from the field?						
4. Do our reports from the field show:						
- Value of Sales						
- Number of Sales						
- Category of Sale						
- Sales Target per period						
- Attainments towards Target						
- Number of Calls made						
- Number of New Customers found						
- Reason for No Sale						
- Length of each Contact						
- Quality of New Customers						
- Number and Dates of Call-Backs						
- New Accounts opened						
- Name and Address of all Calls						
- Complaints						
- Enquiries						
- Request for Quotations						
- Progress on Enquiries						
- Competitive Activity						

	N/A	YES	NO	PART	?	ACT
1. Are field reports and records periodically analysed to reveal:						
- average call rate						
- average ^{of} of travelling time						
- average value of orders						
- number of enquiries passed from head Office						
- conversion ratio of orders to enquiries						
2. Are the boundaries of sales territories clearly defined?						
3. ... and salesmen according to salesmen?						
4. Do we know the "new business" potential in geographic areas into which we intend to expand?						
5. Have we prepared a revision of sales territories in accordance with any proposed increase of salesmen within the next year?						
6. If the major function of our salesmen is to obtain orders, do we nevertheless ask them to make deliveries - sometimes at short notice?						
7. If yes, have we studied the results of this form of delivery in terms of:						
- Effect upon a salesman's planning						
- Effect of postponed or cancelled visits						
- Effect upon morale						
- Excuses for low level orders						
- Lost orders						

	N/A	YES	NO	FAR	?	ACT
1. When we conduct a marketing training course, do we provide information upon all or any of the following:						
a. the sales potential of our product(s)						
b. the specific categories of customers						
c. the market need for our product(s) and the reasons why customers buy						
d. information upon competitors' prices, features and methods						
e. why we are different from our competitors						
f. company policies - terms of trading, credit facilities, discounts, special orders, etc.						
g. company ethics of trading and company objectives						
h. reasons for our price structure						
i. company support - Management, administration and technical						
j. the specific financial advantages of our product(s)						
k. products' technical advantages						
l. how to open the sales interview						
m. the demonstration/presentation sequence						
n. the buying resistance that will be met and the answers to overcome them						
o. closing techniques						
p. use of visual aids						
q. how to identify a "prospect" customer						
r. the value of time - the cost of making a sales call						
s. the working territory						
t. number of calls required						
u. new account opening target						
v. the need for sales records and market information						
w. call-back or follow-up procedures						
x. instruction upon company documentation - reporting procedures, etc.						
y. the need for information on competitive activity, unusual or new application, changes in demand, etc.						

	N/A	YES	NO	PAR	?	ACT
2. Have our marketing training methods undergone improvement within the last 12 months?						
3. If yes, have these improvements obtained the desired results?						
4. If no, what further revision should we consider?						
5. Do we have a small library of marketing books for circulation to marketing personnel?						
6. or a recommended reading list of books that may be obtained from public libraries?						
7. Do we consider and use marketing reports as a means of identifying possible weaknesses?						
8. and to provide material for marketing training?						
9. If our marketing resources are restricted, have we made a thorough evaluation of the consulting services that are available?						
10. Do our training procedures and techniques include:						
- company history						
- sales manual						
- manualized training course						
- visual aids						
- role playing						
- written tests						
- product training						
- a tour of the premises						
- meetings with executives from other departments						
- regular meetings after training						
- field training						
11. Could any of the above be introduced or adopted which would serve to reduce the length of training period or increase the effectiveness of the training?						
12. What is preventing us from applying them?						
13. Is time the problem, could any member of the Management be called upon to assist? If yes, when? _____						

	N/A	YES	NO	PART	?	ACT
1. If any aspect of the Company is lacking in efficiency, do we advise marketing personnel of the practical and economic reasons why immediate remedial action cannot be taken?						
2. and of the possible adverse effects if premature action were to be taken?						
3. As and when competitive activity shows signs of strengthening, do we promptly remind marketing personnel of the particular advantages of our product(s)?						
4. Are we accessible to marketing personnel on the occasions when they most need guidance and advice?						
5. In our communications with our marketing personnel, written or verbal, do we usually convey optimism and enthusiasm?						
6. Is marketing personnel made fully aware of the value of the accuracy of their reports?						
7. Do we express our appreciation when outstanding results have been achieved?						
8. Do we seek suggestions from marketing personnel for ways and means improving our marketing policies, strategies and methods?						
9. If yes, do we advise those that may offer impractical suggestions of the reasons why they cannot be adopted?						
10. Are our communications with marketing personnel of sufficient frequency to enable a rapid identification and correction of critical factors?						
11. As and when an established salesman is undergoing a period of low sales, do we:						
a. By discussion, let him analyse his own performance in detail?						
b. Mentally identify his current failings and, by use of questions designed to guide his thinking, allow him to form the same conclusions?						

	N/A	YES	NO	EAR	?	ACT
c. Inform him that he has effected his own care and that a high level of sales will now follow?						
12. Do we foster a team spirit between salesmen?						
13. Do we promote a spirit of friendly rivalry between salesmen?						
14. Do we stimulate a salesman by occasionally challenging him to attain above average results?						
15. and couple the challenge with some form of incentive?						
16. Do we conduct individual interviews or Area or National Marketing Meetings for any of the following reasons:						
- competitive activity						
- re-training						
- drop in sales						
- new product launch						
- improvements in product/service						
- new sales aids						
- price changes						
- change in economic climate						
- change in company policy						
- change in company structure						
- change in system and/or procedures						
- sustain morale						
17. Prior to a meeting, do we request marketing personnel to submit subjects which they would like to see included on the Agenda?						
18. After a meeting, do we request marketing personnel to state which of the subjects covered they felt were of most benefit to them?						
19. Do we ensure at a marketing meeting that:						
- no person is singled out for criticism						
- participation and opinions are obtained						
- negative attitudes are dispelled						
- enthusiasm is developed						
- confidence in the future is displayed						

	N/A	YES	NO	PAR	?	ACT
1. Are sales targets set for salesmen?						
2. If yes, are the targets in line with those prevailing within competition?						
3. Are targets geared to a realistic level of sales?						
4. Should targets be subject to review and revision?						
5. Are incentives geared to sales targets?						
6. If no, have we calculated the precise volume of sales required from each salesman?						
7. and considered an incentive payable upon sales obtained above this volume - paid monthly, quarterly or bi-annually?						
8. If bonuses and commissions are paid in addition to salary, are they a true incentive to produce more sales?						
9. If no, should we consider an alternative incentive scheme designed to achieve this?						

	N/A	YES	NO	PAR	?	ACT
1. Before production or introduction of a new product do we ascertain the following:						
a. potential consumers acceptability						
b. current market trends						
c. competitive products and prices						
d. the basic and special features that the new product must possess						
e. the approximate selling price of the new product						
f. distributor/retailer acceptability						
g. alternative strategies of distribution						
h. discounts						
i. credit terms and facilities						
j. the effect upon our present product range						
k. sales forecast						
l. area of distribution						
m. potential share of the market						
n. product launching costs						
o. total marketing costs in the first year						
p. the reaction of our own sales force						
2. Have we recently applied the above marketing research techniques to our present product range?						
3. Has anyone been given responsibility for marketing research and acquisition and circulation of:						
a. trade publications						
b. trade association reports						
c. market trend reports						
d. new product reports						
e. government publications concerning the market						
f. competitive literature						

	N/A	YES	NO	PART	?	ACT
1. Before the launch of a new product, do we:						
a. establish the product's break-even point?						
b. prepare a cash flow forecast?						
c. establish a marketing budget?						
. Do we itemize and allocate expenses in line with the budget for:						
a. marketing personnel salaries						
b. salesmen's bonus/commissions						
c. travel expenses of marketing personnel						
d. transport						
e. distribution						
f. new product sales promotion campaign						
g. new product sales training						
h. advertising						
i. catalogues						
j. direct mail						
k. packaging						
l. promotional displays						
m. press release						
n. press conference						
o. exhibitions						
p. overhead allocation						
3. Do we set target dates for action and completion of the above?						
4. Prior to the product launch, do we set up procedures to measure the effect upon the sales of our other products?						

	N/A	YES	NO	PART	?	ADD
1. Do we periodically review our marketing communications documents?						
2. Do we periodically review the procedure for marketing instructions or communications?						
3. Are <u>any</u> important communications overlooked because they are not committed to paper?						
4. Do certain marketing documents contain items which are no longer applicable?						
5. Is the information content in marketing communications adequate?						
6. To provide further control information and/or save time, should additional <u>documentation</u> be prepared?						
7. Could certain forms be eliminated by incorporating the information into other existing documents?						
8. In the light of <u>experience</u> , could the layout of certain documents be improved?						
9. Are delays or errors in marketing strategy processing caused by incomplete information being received from other departments?						
10. Do we have central communication marketing information system, into which information is placed for distribution and evaluation?						
11. If no, would we benefit by introducing such a system?						
12. Is our routing of marketing documentation periodically reviewed and <u>revised</u> ?						
13. Is marketing documentation coded to indicate the degree of priority?						
.... and the need for feedback information?						
14. Do our control procedures enable <u>speedy</u> identification of progress made?						

	N/A	YES	NO	PART	?	ACT
15. Is market information documented and circularised as necessary to indicate:						
a. a delay is anticipated						
b. a delay has occurred						
c. total of delay to date						
d. department of present delay						
e. length of present delay						
f. reason for present delay						
g. action taken						

Which marketing projects are pending introduction/improvement, and what is the present state of development?

ACTION PENDING

AWAITING APPROVAL

RECOMMENDATIONS
IN PREPARATION

FURTHER DISCUS-
SION NECESSARY

MORE INFORMATION
REQUIRED

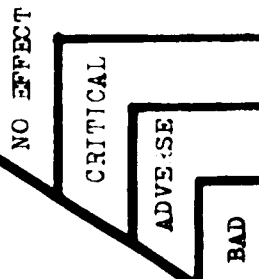
PROJECTS

CO-ORDINATING ACTION										

FACTORS TO BE CONSIDERED INCLUDE ABOVE AND OTHER REASON										

EXPECTED EFFECTS IF ACTION IS NOT TAKEN										

- | | |
|----|-----------------------|
| 1. | MARKETING ELEMENTS |
| 2. | COMPANY OBJECTIVES |
| 3. | MARKETING PLANNING |
| 4. | PRODUCTION LINES |
| 5. | MARKET EXPANSION |
| 6. | MARKETING POLICY |
| 7. | CREDIT POLICY |
| 8. | MARKETING BUDGET |
| 9. | DISTRIBUTION STRATEGY |



FACTORS THAT COULD IMPEDE ACTION OR PROGRESS	COMPANY POLICY									
	COMMUNICATIONS									
	MANAGEMENT									
	EQUIPMENT									
	FACILITIES									
	TECHNOLOGY									
	FINANCE									
	PERSONNEL									
	MATERIALS									
	OTHER									

EXPECTED EFFECTS IF ACTION IS NOT TAKEN	COMPANY POLICY									
	COMMUNICATIONS									
	MANAGEMENT									
	EQUIPMENT									
	FACILITIES									
	TECHNOLOGY									
	FINANCE									
	PERSONNEL									
	MATERIALS									
	OTHER									

EXPECTED EFFECTS IF ACTION IS NOT TAKEN	NO EFFECT									
	CRITICAL									
	ADVERSE									
	BAD									
	MARKETING ELEMENTS									
	33. COMPETITIVE ACTIONS									
	34. WAREHOUSING									
	35. DELIVERY SYSTEMS									
	36. ROUTING									
	37. AFTER-SALE SERVICE									
38. SALES TERRITORIES										
39. SALARIES										
40. OPERATING EXPENSES										



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