

Confidential Strategy Pre-Flight Checklist

By Jay Abraham

Jay Abraham

Dear Strategy Setting Super Summit Participant:

Outlined below are the **Strategy Pre-flight Checklist** items which you can immediately use to stimulate your marketing strategy creation and deployment with your team.

Personally, I use this list to jog my own thinking when engineering marketing strategies for myself and own clients... Seeing how I can further enhance or create a more pervasive marketing strategies... with as many multiple inputs, outputs, resources, pillars, efforts and actions as I can. Using the list has four main benefits to you and your business:

- To help *formulate* your strategy initially.
- To help you appreciate the options and resources you have available to you. You'll start to appreciate how much you have at your disposal when engineering the optimum strategy for your business. Each section is like an "*arsenal of opportunity*".
- To give you a checklist to see if you missed anything *absolutely* essential to the creation of your marketing strategy.
- And once you start integrating this checklist within your business, I think you'll find it to be a constant source of ideas regarding what you can focus on next, while still keeping your master strategy in place. This list will eliminate your jumping around *tactically* and inefficiently.

In order to creatively generate a marketing strategy you must be aware of your resources, options, alternative actions, sources of information, etc. If you don't, you'll most likely settle for a strategy which is sub-optimized because of a severe lack of awareness of resources, flexibility of action, or information available when you initially devise your strategy. Thereby crippling your efforts and minimizing your results "from the get go".

In my consulting, I have notice people generate a strategy based upon what they know or what they have experienced. Rarely is it based upon what's possible. This is my attempt to expand your awareness of what's available and what's within your capability related to massively growing your business--- **Strategically**. Your job here is to figure out how to creatively innovate, integrate and engineer the most important ones for your and your business.

You can use this “preflight checklist” also as strategic “*cheat sheet*”. To make sure that you know all the specific things you can do as a part of your master, command or field strategies. It is really helpful when deciding out what the next steps or options you should take to fully deploy your strategy.

I wish the best of strategic success!

Yours Truly,

A handwritten signature in black ink, appearing to read 'Jay L. Abraham'. The signature is stylized with a large initial 'J' and a prominent 'A'.

Jay L. Abraham

PS: Please feel free to add your own unique resources, actions or points of impact. These 11 pages are meant to stimulate your thinking and not be all and end all. In fact, if I were you, I’d look at it as a starting point for your strategy creation efforts.

PPS: The biggest opportunity in using this document is to stimulate you to engineer hybrids as I do in my own work. You may want to try taking a two or more of the items and creating a hybrid specific marketing campaign.

**Strategy
Pre-Flight Checklist**

Data, Research and Information Sources

- Employees Surveys
- Focus Groups
- Interviews
- Customer and Prospect Questionnaires
- Point of Purchase Surveys
- Research Companies
- Trade Shows
- User Groups
- Sales Historical Records
- “Amazon.com” School of Research
- Internet Sources
- Competitors Literature, Customers and Web Site
- CRM System & Databases
- Trade Magazines & Newsletters
- Training Programs
- Associations
- The Library
- The Bookstore
- Coaches and Consultants

Vision

- 90 Day Plan
- 1 Year Plan
- 3 Year Plan
- 5 Year Plan
- Purpose & Company Values; What You Aspire To
- Mission Statement
- Product Vision
- Long Term; Global Vision
- What is Your Company’s Legacy?

Strategy Pre-Flight Checklist

Goals

- Cash Flow
- Revenue
- Net Worth
- Profitability
- # of Customers
- # of Products Sold
- # of Orders
- Inventory Turns
- # of Employees
- Amount of Cost Reductions
- Return on Investment
- Return on Equity
- Increased Square Footage
- Return on Sqft.

Your Strategy

- Your Current Master Marketing Strategy
- Your Current Command/Field Strategies
- Your Current Integrated “Game Plan”
- Your Current Specific Working Tactics

Key Indicators & Concepts

- Marginal Net Worth; Lifetime Value of a Client
- USP
- Dream 100

Financial Resources

- Angels Investors
- Personal Savings
- Credit Lines

Strategy Pre-Flight Checklist

- Cash Flow
- Vendor Terms & Quantity Discounts
- Your Bank
- Alternative Funding Sources; Current Cash Cows

Resources

- Time
- Role Models
- Mentors
- Your Pricing Structure
- Remarkable, Unique or Differentiating Attributes and Characteristics of The Business
- Certifications and Accreditations
- Unused, Dormant or Hidden Resources
- Your Inventory
- Your Personal Values
- Obstacles, Restraints & Limitations
- Company Culture
- Your Current Company Momentum
- Your Company's Core Competencies
- Personal Core Competencies
- Intellectual Property & Patents
- Your Current of Products & Services
- Your Store, Plant, or Office
- Your Vehicles
- Peer Recognition
- Your Machinery or Tools
- Your Technology
- Your R&D Department
- Your Vendors
- Your Mastermind
- Your Bank
- Your Landlord

Strategy Pre-Flight Checklist

- Your Employees
- Business' Experts (Lawyer, Account,
- Joint Ventures

Management Resources

- Current Automatic Operational Systems
- Current Policies & Procedures
- Financial Reporting Information Systems

Your Company's Ability to...

- Innovate
- Be Clear
- Concentrate
- Build a High Quality Product or Provide Extraordinary Service
- Build Extraordinary Value Into Everything You Do
- Market
- Educate and Inform Your Market
- Question Your Assumptions
- Lead Your Team and Your Clients
- Adopt, Imitate or Emulate From The Outside
- Build Enduring Relationships
- Focus on What You Do Best
- Create Trust
- Generate Loyalty & Affinity
- Satisfy The Client
- Get Publicity and Media Attention
- Eliminate Delay
- Create Strategic Alliances
- Manage by Commitments, Objectives and Goals
- Research and Collect Valuable Information
- Be Proactive
- Follow Through; Keep Your Commitments

Strategy Pre-Flight Checklist

- Be Efficient and Effective
- Re-Purpose
- Leverage Your Resources
- Be Action Oriented
- Notice Patterns and Trends
- Understand what your Customer Wants and Needs
- Know Your Market
- Know Your Competitors
- Communicate
- Shoulder the Risk of the Transaction Instead of Your Customer

Marketing Resources

- Customers & Clients
- User Groups
- Affinity Groups
- Current Advertisements
- Current Sales Letters
- Current Sales Scripts
- Current USP(s)
- Winning Headlines
- Winning Offers
- Your Target, Prospect, Lead Mailing Lists
- Collaborative Resources Like Copywriters, List Resources
- Co-Marketing Programs
- Your Brand
- Shelf Space
- Your Product's Packaging
- Your Name
- Slogan or Tag Line
- Dream 100
- Your Industry's Weaknesses
- Key Clients & Accounts; Client Roundtable

Strategy Pre-Flight Checklist

- Your Logo
- Sales Training
- CRM Systems
- Sales Management
- Sales Executives
- Account Managers
- The Telephone, Telephone Conference Calls
- Sales
- Testimonials
- Media Recognition
- Approved Customer References

Direct Response Media

- Mail
- Email
- Chat Rooms
- Discussion Groups
- Web-Site
- E-Commerce
- TV Commercials; Cable TV
- Infomercials
- Print Ads; Newspaper, Magazines, Newsletters, Journals, Trade Magazines,
- Sales Letters
- Post Cards
- Magalogs; Books

Other People's...

- Time
- Money
- Risk
- Brains/Intelligence
- Resources

Strategy Pre-Flight Checklist

- Money
- Labor
- Effort/Energy
- Rolodex/Contacts
- Products or Services
- Technology
- Property

Abraham Command/Field Strategies and/or Tactics

- Review and Optimize Existing Marketing
- Referral Systems
- Reactivating Old Clients
- Joint Ventures (Host Beneficiary/Endorsements)
- Risk Reversal
- Upgrading Skills of Sales Staff
- Using Public Relations
- Point of Sale, Up-Selling, and Cross-Selling
- Increasing Profit and Hence Margins
- Changing the Profile to Upscale
- Offering Greater Units of Purchase
- Deliver Higher-Than-Expected Levels of Service/Support
- Communicating Frequently – To Get Them to Buy More/More Often
- Develop Back End
- Run Special Events
- Price Inducements
- Program & Pre-frame Your Customers to Buy More Frequently
- Communicate Frequently – When Prospecting for New Clients
- Process Marketing - Getting Qualified Lists, Using Direct Mail, Telemarketing, etc.
- Irresistible Offers
- Marketing Business Assets not Normally Sold
- Acquiring Customers at Break-Even Up Front and Profiting on the Back End
- Advertising

Strategy Pre-Flight Checklist

- Special Events
- Increase Perceived Value
- Direct Response Advertising
- Buy Another Company (to acquire Other Products, Customers, etc.)
- Licensing
- Barter
- Multi-use/Re-purposing Products
- Being an Expert in Your Industry
- Sequential Marketing

Abraham “Nine Drivers”

- Marketing
- Strategy
- Capital
- Business Model
- Current Relationships
- Distribution Channels
- Products and Services
- Processes, Your Procedures and Your Systems
- Ideology

Benefits of Your Products or Service

- Increase Time, Money or Control
- Reduces Risk; Increases Security
- Increases Protection
- Make You More Attractive
- Entertaining
- Informational
- Educational