

Marketing Collateral Checklist



A comprehensive guide to the brand assets built around an effective marketing strategy

Defining Collateral

Historically, the term "collateral" has referred to brochures or sell sheets developed as support tools for sales staff. Collateral has been used to include marketing materials such as [brochures](#), business cards and other promotional items.

As we've moved to the digital landscape, our definition of marketing collateral has evolved. While most companies and organizations haven't abandoned business cards and letterhead, these assets have taken a backseat to the website, blog, ebooks and other digital assets that deliver a concrete return on marketing investment.

Brands and organizations present collateral to connect to audiences through consistent identity, messaging, visitor and customers experiences. Collateral is no longer a static, one way channel. Today's marketing assets are what provides an engaging experience for your audience.

That's why today's collateral is created by a deep understanding of your [ideal buyer](#), supporter and their touchpoints with the brand. Planning and creating collateral requires careful planning and creatively executed marketing and sales.

Building A Foundation

To make the most of marketing dollars, creating collateral starts with an understanding of an organization's [mission](#), and a strong brand positioning statement. It's also important to have a marketing strategy that sets clear, measurable goals and includes an in-depth understanding of the target prospects, whose actions are needed to reach the organization's goals.

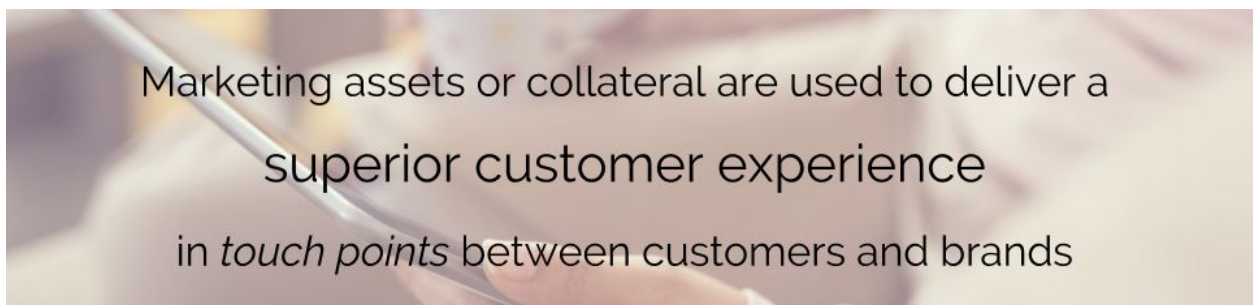
It's often tempting to jump right into marketing tactics before establishing a marketing strategy. The planning process helps ensure that all marketing efforts have the intended impact.

Doing the footwork to build the foundational pieces of a solid brand is well worth the time. Once you have your marketing collateral materials in order, you can focus more effectively on a [successful marketing plan](#).

A complete set of key collateral covers the stages of the visitor and customer journey through the contemplative cycle. The **Five A's**, as developed by [Philip Kotler](#) in his book [Marketing 4.0](#), reflect the customer path in the age of connectivity and influence among customers:

1. **Aware:** Customers are exposed to a list of brands, communications, or advocacy of others
2. **Appeal:** Once customers process all the messages, they have a short list of brands to consider
3. **Ask:** Customers follow up by active research of the brands they are attracted to
4. **Act:** If they are convinced by further information in the ask stage, customers will decide when to act
5. **Advocate:** Active advocates spontaneously recommend brands they love without being asked by telling positive stories and becoming evangelists

Marketing collateral helps create the touchpoints that comprise the customer experience throughout the **Five A's** lifecycle.



As you review your marketing strategy, keep a checklist of what collateral you are going to need to create or develop further. Below are some marketing collateral ideas to get you started.

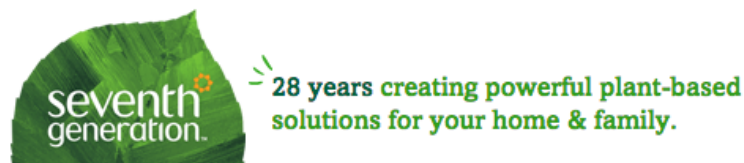
Brand Assets

❑ Mission Statement

A powerful [mission statement](#) articulates the core of what an organization does and an aspirational outcome that the organization is pursuing. Buyers are giving higher regard to organizations that are driven by meaning and consideration for the broader world, beyond just filling demand for products and services.

The company's mission statement is the number one marketing asset. It is a statement that is short in length, but long on vision. Whether you are a business or nonprofit, if your organization isn't clear about its own mission, customers and other stakeholders won't be either.

Here's an example of a mission statement from the company Seventh Generation:



⇒ OUR MISSION ⇒

To inspire a consumer revolution that nurtures *the* health of the next seven generations.

No matter how big or small your business or organization is, having a clear vision that everyone understands inspires, motivates and aligns executives, employees and

other stakeholders, and attracts the right audience. A solid mission also works as a decision-making tool in ongoing strategic marketing.

Background context that helped form the mission statement can be expressed in the form of a vision statement, philosophy outline, or operating principles. These can be separate, or incorporated into the next asset, the message platform.

❑ Message Platform

A colorful graphic or logo isn't enough to convey what your brand is about. You need messaging to back it up. One form of collateral that is critical to building consistency and clarity for your personas is what we refer to as a *key message platform*.

The message platform is a document ranging anywhere from 2-10 pages. The message platform. The key message platform itself is not for public consumption; it is an internal document that provides alignment across the organization on standardized language on what you do (mission), why you do it (vision), and who you do it for (key personas).

The key message platform will be an important guide and springboard for much of the content assets, including web copy, blog posts, pillar pages, and brochures. It will provide the consistent voice that your audience will recognize and appreciate the clarity of.

❑ Persona Profiles

An [ideal persona](#) is a detailed semi-fictional profile of your customer or supporter. It tells you who your prospective customer is and what their challenges and thinking are during each stage of the contemplative journey.

Personas are created based on market research and real data about existing customers, and it includes customer demographics, attitudes, concerns, goals, motivations, and behavioral patterns.

By researching what your ideal customer's relevant challenges and interests are, you can align your marketing strategies to convert visitors into leads, and leads into customers.



This data, plus the continuous improvement process in understanding your buyers is also used to turn your customers into advocates of your brand.

❑ Logo

A logo is a visual manifestation of all that is great about your business or organization. Make sure that it reflects your mission, message platform and brand style guide. In this way you can be assured that it will appeal to your ideal buyer or supporter personas, and align all stakeholders under a common visual representation.

❑ Colors

Complementing the logo, the color palette contains approved color swatches and formulas and guides the visual elements of marketing assets to ensure brand consistency.

❑ Brand Style Guide

The brand style guide is a document that helps ensure consistency by giving key staff and vendors a guide for how to use logo, colors, and other style elements as well as other important guidelines for your brand.

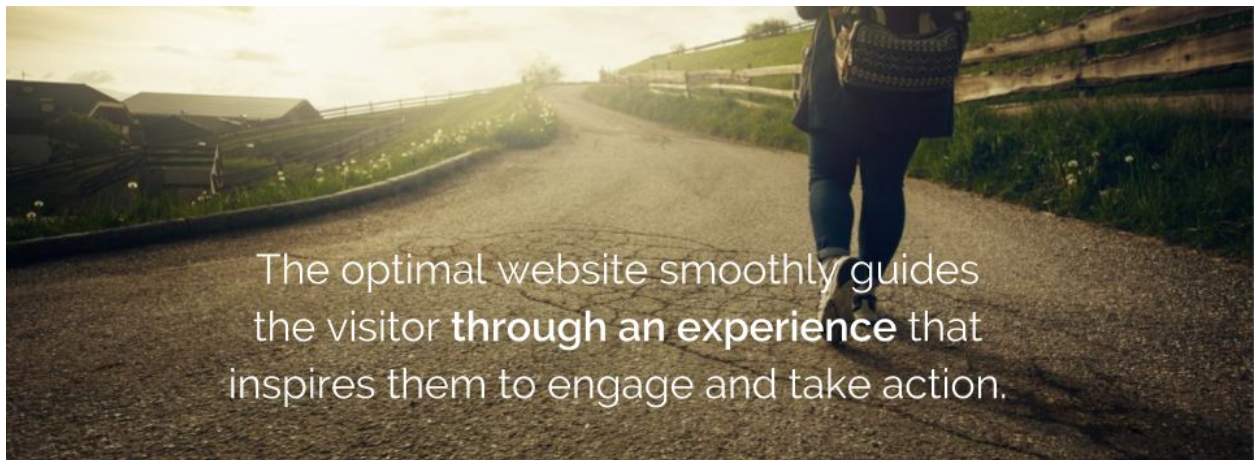
The logos, colors and messaging for your business or organization should align across all of your various marketing assets.

Marketing Assets

❑ Website

What was once a brochure, an organization's website is now its marketing hub. The website attracts visits, and provides education and information that appeals to visitors in a way that compels them to engage further.

The [optimal website](#) smoothly guides the visitor through an experience that invites them to engage and take action. Given this critical objective, it's important to develop a solid development plan that is guided by the marketing strategy and brand assets.



The website will include sub-assets such as separate templates for web pages, different types of emails, pillar content, blog posts, blog listing page, landing page templates and system pages.

Both text and visual content are also valuable assets within the website that are considered carefully as part of the marketing and website strategies.

❑ Content: Pillar and Blog Pages

Pillar and blog pages focus on creating and distributing valuable, relevant, and consistent content that attracts and retains a clearly defined audience and to drive profitable customer action.

A pillar page is a comprehensive informational page that focuses on core topics that are highly relevant to your customers' challenges and goals. The pillar page covers a topic in depth and links supporting topics that expand on the topic.

Topic clusters organize a pillar page and the subtopic content (blog pages) that's been compiled for the core topic. Subtopics link to the pillar page, which creates internal 'link juice' that helps your website boost authority in search for those topics.

Tracking the performance of content helps you understand what topics perform well in terms of drawing traffic and converting visitors into leads, and leads into customers..

❑ Video

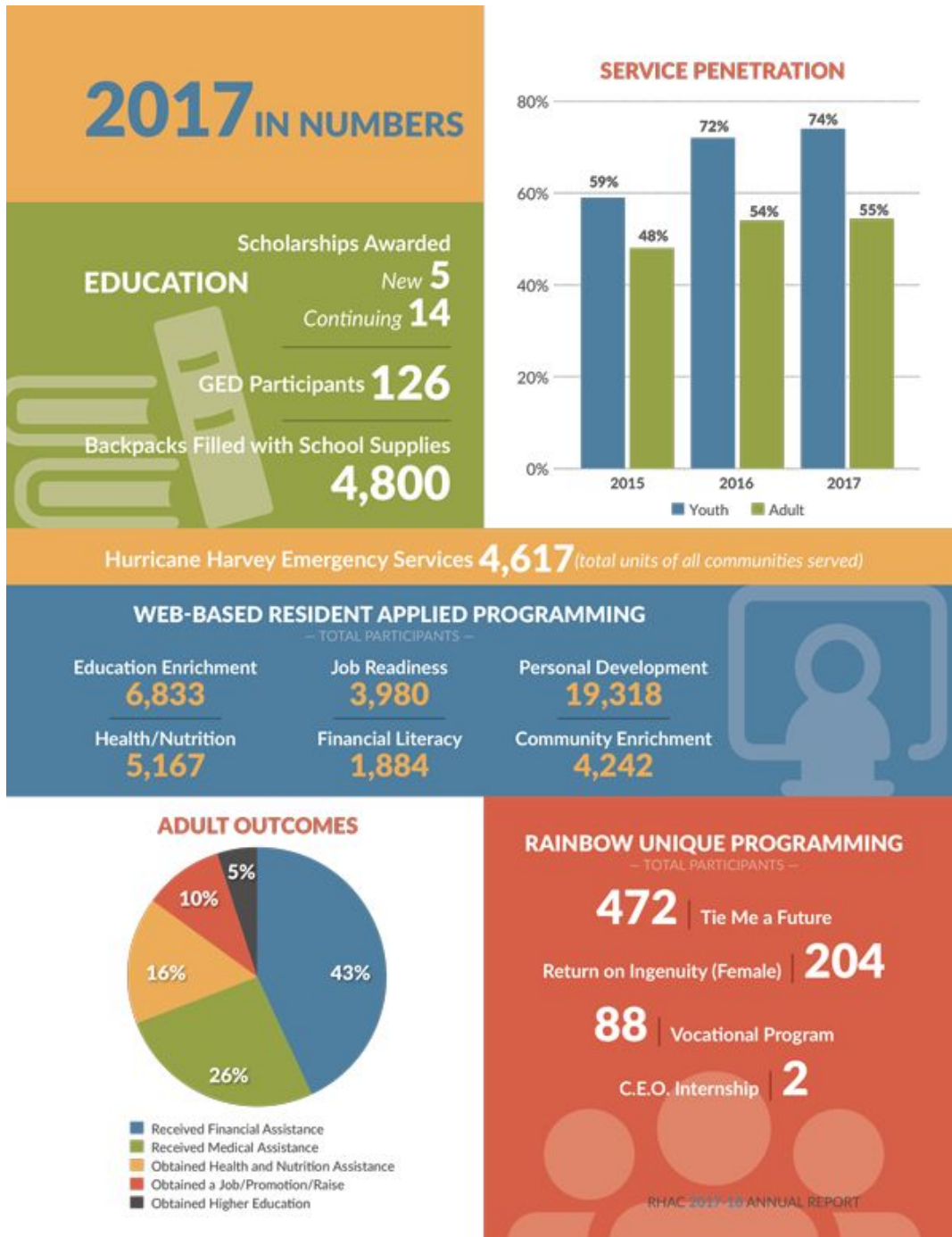
Video marketing provides a visual complement to written content in a highly shareable format that generates traffic and maximizes search on video search engines such as YouTube. Video is also a great way to drive traffic to other content or areas of your site, generate leads and guide the ideal persona through the contemplative journey.

Video doesn't have to be high-end or high-cost to earn viewers. In the human-centric marketing of today, more trust and authority can be gained by being authentic and sharing information in a straightforward manner.

❑ Infographics

Infographics are a great visual way to tell a story and show impact. Infographics are versatile in that they can be used across many channels – print material, social media

and the website, for example. This example of an infographic was used originally in an annual report.



❑ Social Media

Social media is channel that facilitates frequent engagement with your audience. It's also a platform where your customers and supporters become influencers by advocating for the brand.

Social media is a tool for both broadcasting information and listening to your audience. It can also provide endless data about your ideal prospects, and serve as a customer service platform as well.

The brand style guide is an ideal document to establish consistent voice and other guidelines across social media channels. Some organizations may choose to create a separate social media guidebook.

❑ Social Media Advertising

Social media advertising offers the opportunity to tell your brand's story to a targeted audience of ideal personas and supporters based on their interests, preferences and / or demographics.

❑ Email Marketing

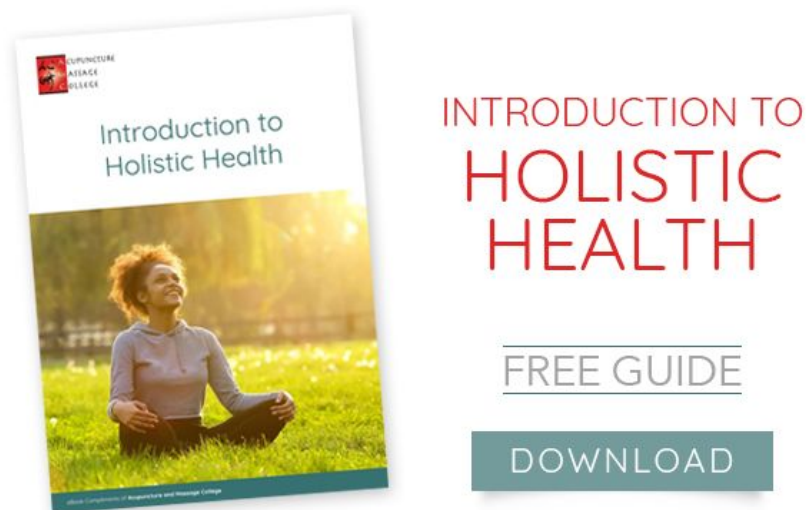
Email nurtures your relationship with leads to help them become customers or supporters. Emails should be tailored to each persona and / or phase of the buyer's journey.

There are many types of [emails marketing](#) assets, including monthly content or informational newsletters, automated email nurturing sequences that are tailored to different campaigns, sales nurturing sequences that allow sales teams to be more efficient and consistent in sales processes, ecommerce product and abandon cart campaign emails and more.

A / B testing can be an effective tool in refining email marketing assets. Periodically test different days, times, subject lines and other formats to land on the variation with the most opens, clicks and engagement.

❑ Ebook

Ebooks provide in-depth information on a topic of interest to your ideal prospect, customer or supporter, usually one they've read about on a relevant page of the website or perhaps in an informative email.



The content is educational, not salesy. It's focused on solving a problem or meeting a need that you know the site visitor has. Ebooks offer the opportunity to convert visitors to leads when people download the e-book by filling out a form.

An ebook can be a downloadable version of the content on a pillar page, offering the reader a more portable option to consume the content.

❑ Case Study

Case studies show how your organization has solved problems for your ideal customers in the past. Case studies usually include the metrics or measures of success you know are important to them, and a description of the processes or

journey that led to successful outcomes. Here's a snapshot of [one of our case studies](#).

Medical Retailer's Traffic Up 360%, Sales 46% from Inbound Marketing



Executive Summary

Rejoyn Medical Systems is an e-commerce provider of life-improving solutions for people with erectile dysfunction. Via their online shopping site, Rejoyn offers a full line of medical vacuum pumps that restore performance and confidence to men affected by ED.

Rejoyn Medical Systems came to Yodelpop for help developing a marketing strategy that would allow them to make online sales to customers a significant revenue stream. Since engaging Yodelpop, Rejoyn has seen a **360% increase in annual traffic from organic search**. The bottom line results are clear: the company has seen **annual revenue from ecommerce increase by 46%**.

Case studies include quotes or testimonials from customers. Personal stories are incredibly powerful, and your prospects will want to hear from others like them what you've been able to achieve for them.

❑ White Paper

In some industries, white papers are more the norm than e-books. White papers show your thought leadership by presenting research, findings, and / or analysis on a relevant topic.

❑ Slideshare

A [Slideshare](#) deck is a great way to share a presentation that you've worked hard to create for a sales meeting (see Networking & Sales Assets below). You can repackage the presentation and share it on a [Slideshare account](#) for wider reach.

❑ Webinar

Webinars, workshops or seminars given in a web conferencing format, allow you to educate attendees on a topic in a multimedia educational format. The group setting builds trust in your company or organization through social proof. Webinars can be recorded and reused in ongoing marketing campaigns as on-demand offers.

❑ Annual Report

A [nonprofit annual report](#) is an essential piece of collateral; it builds donor trust and attracts your ideal supporters and tells the story of the organization's success. A well-done annual report can build excitement and investment among all stakeholders.

Annual reports showcase an organization's accomplishments through storytelling and photographs, create an opportunity to thank donors and supporters, and issue a clear call to action to readers for how they can help keep the momentum going.



❑ Sustainability Report

A sustainability report is one that an organization—typically firms that follow a triple-bottom-line (people, planet and profit) model of business—creates to share information about their progress on the integration of economic, environmental and social goals of the organization.

Similar to a nonprofit annual report, a sustainability report helps to internalize and improve an organization’s commitment to sustainable development in a way that can be demonstrated to both internal and external stakeholders.

Like many of the assets in this list that have traditionally been in print format, the sustainability report is a great asset to render digitally for increased reach and engagement.

Networking and sales assets

❑ Business cards

Still important symbolically, business cards come in handy in person as a way to quickly share contact information, and when working with prospects who don’t have a 100% digital lifestyle or industry.

❑ Print brochure

The internet has become so important in reaching out to an audience, and nurturing those relationships. But it is not a complete substitute for real live person-to-person engagement.

Your prospective customer may not always have access to mobile devices and an internet connection, and they may appreciate holding your brochure to do more research on their purchasing experience.

A prospect might appreciate being handed a concise piece of literature that distills all of the information into the pieces they need to inform their process. There's no getting lost in a brochure.

❑ Online brochure

You can convert your print brochure into a powerful online marketing asset. Translating your print brochure into an online brochure saves money on printing and mailing large quantities of brochures.

It also creates ease of access for your ideal customers, opportunities for engagement, such as links to social sharing, newsletter sign ups, and other areas of your website. An online brochure saves space and has less impact on the environment that can apply to the organization's sustainability goals.

❑ Sales Sheets

A sales sheet, also known as a product datasheet, or sell sheet, is a tool that relays product or service details, such as features, benefits and pricing in a one-sheet format. Sales reps often offer sale sheets to help customers make buying decisions.

Sales sheets are often used in person, but they should also be available online for the sales team to use in the sales email nurturing process. With the right customer relationship management (CRM) software, the viewing or downloading of sales sheets gives key intelligence on lead progress based on activity.

❑ Smarketing Service Level Agreement

A traditional service level agreement (SLA) describes services and delivery processes that a customer will receive from a service provider. Similar to this, the 'smarketing' (sales and marketing) agreement that details both marketing goals (like number of leads or revenue pipeline) and the sales activities that will follow up on leads qualified by marketing.

Both teams use this document as a commitment to support each other, based on concrete, numerical goals. According to the State of Inbound, 81% of marketers whose companies have this type of SLA have an effective marketing strategy.

❑ Displays

Displays are important assets when it comes trade shows, conferences, and in-store communication. Like many other print assets, displays can be part of a unique omnichannel experience by adding URL that connects to relevant content online. This is also a way to track traffic unique to the event, and to further the buyer's journey.

❑ Presentations

Presentations are often essential for meetings and sales; these can be repurposed as Slideshares, videos and PDF downloads on your website to convert visitors to leads. Templates can be created where branding is aligned with the brand style guide so that teams can maintain consistency across various presentation types.

About Yodelpop

Yodelpop is a sustainable marketing agency, creating inbound marketing and optimal user experiences aligned with sustainable goals for mission-driven businesses and nonprofits.

Our services include:

- [Inbound marketing](#)
- [Web development](#)
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