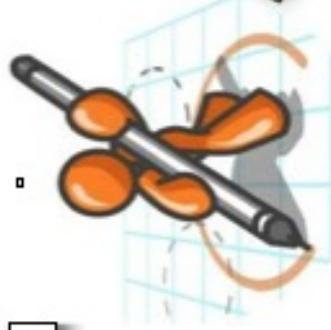


Physical Therapist Marketing Readiness Self-Assessment

Me



Individual Self-Assessment
Individual Marketing Action Plan

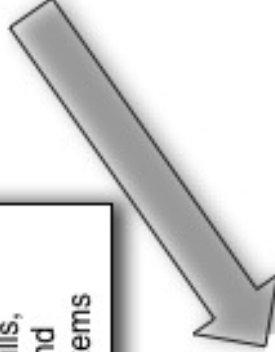


My Team



Team Self-Assessment
Team Marketing Action Plan

Assessment
of
Knowledge,
Experience,
Attitudes,
Skills,
and
Systems



My Organization

Organizational Self-Assessment
Organizational Marketing Action Plan

Physical Therapist Marketing Self-Assessment

©Kovacek Management Services, Inc. 2011.
All Rights Reserved.
Used with Permission.

This tool is designed to help you assess the readiness, knowledge, skills, experience, attitudes, and commitment of you, your team and your entire organization to being successful in marketing. Identifying your current scores and comparing them to your desired/target scores in each of these key areas will allow you to best develop a plan to achieve success in marketing activities. Action plans should be developed for each individual, team and organizations with specific activities, timelines for completion, and measurable end points so that progress can be monitored easily.

Score yourself, your team and your organization twice: once for your current status, then on your ideal score.
Then indicate how important (A, B, C) the factor is to your organization. A = Very Important; B = Important; C= Not Important at All.

Scoring Scale
1 = very poor - a serious weakness
2 = poor
3 = not great/not bad
4 = pretty good
5 = very good – a strength

Example	Myself	My Team	My Organization	Importance	Actions/Timeline
Understanding Of Marketing	3 / 4	2 / 5	2 / 5	A	Distribute Basic Marketing Educational Materials to All Key Staff by end of Q1



Marketing Overview/ Screen (To Be Completed by Each Individual in the Organization)

Key Factors	Myself	My Team	My Organization	Specific Areas of Concerns
Knowledge Related to Marketing Activities				
Experience in Marketing Activities				
Skills Related to Marketing Activities				
Attitudes Toward Marketing Activities				
Understanding of Implications of Marketing Success/Failure				
Other Factors Specific To Our Organization				



Marketing Knowledge (To Be Completed by Each Individual in the Organization)

Key Factors	Myself	My Team	My Organization	Importance	Actions/Timeline
Understanding Of Our Strengths, Weaknesses And Opportunities					
Understanding Of Competitors' Strengths, Weakness And Opportunities					
Understanding Of Threats To Our Success					
Understanding Of Common Marketing Research Tools					
Understanding Of Our Sustainable Competitive Advantages					
Understanding Of Our Marketing Responsibilities					
Identification Of Our Key Markets					
Identification Of Our Key Messages For Each Market					
Understanding Of Options/Benefits/Costs For Delivering Messages To Our Key Markets					
Understanding Of Methods To Evaluate Marketing Success					
Ready Access To Resources On Marketing					
Other Factors Specific To Our Organization					



Existing Marketing Capabilities (To Be Completed by Each Individual in the Organization)

Key Factors	Myself	My Team	My Organization	Importance	Actions/Timeline
Ability To Develop A Marketing Plan					
Ability To Develop A Marketing Budget					
Ability To Identify Key Market Segments					
Ability To Create Clear Marketing Communications					
Ability To Develop Targeted Marketing Campaigns					
Ability To Analyze Marketing Data					
Ability To Evaluate Results Of Marketing Activities					
Ability To Develop Marketing Tools					
Other Factors Specific To Our Organization					



Previous Marketing Experience (To Be Completed by Each Individual in the Organization)

Key Factors	Myself	My Team	My Organization	Importance	Actions/Timeline
Experience Developing A Marketing Plan					
Experience Developing A Marketing Budget					
Experience Identifying Key Market Segments					
Experience Creating Clear Marketing Communications					
Experience Developing Targeted Marketing Campaigns					
Experience Analyzing Marketing Data					
Experience Evaluating Results Of Marketing Activities					
Experience Developing Marketing Tools					
Marketing Success Track Record					
Other Factors Specific To Our Organization					



Marketing Attitudes (To Be Completed by Each Individual in the Organization)

Key Factors	Myself	My Team	My Organization	Importance	Actions/Timeline
Attitudes Toward Learning And Developing Marketing Skills					
Attitudes Toward Integrating Marketing Into Corporate Mission, Vision And Values					
Commitment To Marketing Success					
Other Factors Specific To Our Organization					



Implications Of Marketing Success/Failure *(To Be Completed by Each Individual in the Organization)*

Key Factors	Myself	My Team	My Organization	Importance	Actions/Timeframe
Understanding Of What Marketing Success Or Failure Means For Me As An Individual					
Understanding Of What Marketing Success Or Failure Means For Our Team					
Understanding Of What Marketing Success Or Failure Means For Our Organization					
Other Factors Specific To Our Organization					

PTManager.com
KovacekManagementServices
(586) 774-5774
Pkovacek@PTManager.com



My Personal Marketing Action Plan

Use this section to develop an action plan for yourself. Each member of your team should develop a personal action plan before the team comes together to create a team action plan.

Specific Activities	My Actions	Timeline	Measurable End Point
Marketing Knowledge Development			
Marketing Skill Development			
Marketing Attitude Adjustment			
Integration Of Marketing Into Organizational Mission, Vision, Values			
Other			

Which areas are most problematic for you? Which areas do you feel you will need the most assistance with?

What support systems will need to be in place to help you succeed as you address your problem areas?

PTManager.com
KovacekManagementServices
(586) 774-5774
Pkovacek@PTManager.com

Marketing Knowledge Inventory



(To Be Completed by Each Team and the Organization as a Whole)

Enhancement Needed		Area of Knowledge	Comments
Team	Organization		
<input type="checkbox"/>	<input type="checkbox"/>	Our Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Competitors Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Our Organization's Capabilities and Service Preferences	
<input type="checkbox"/>	<input type="checkbox"/>	Our Mission, Vision and Values	
<input type="checkbox"/>	<input type="checkbox"/>	Components of a Marketing Plan	
<input type="checkbox"/>	<input type="checkbox"/>	Market Segmentation	
<input type="checkbox"/>	<input type="checkbox"/>	Key Potential Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Key Potential Customers	
<input type="checkbox"/>	<input type="checkbox"/>	Customer Needs and Wants	
<input type="checkbox"/>	<input type="checkbox"/>	Mechanism to Research Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Market Forecasting	
<input type="checkbox"/>	<input type="checkbox"/>	Developing a Marketing Message	
<input type="checkbox"/>	<input type="checkbox"/>	Selecting Marketing Media	
<input type="checkbox"/>	<input type="checkbox"/>	Advertising Options	
<input type="checkbox"/>	<input type="checkbox"/>	Sales Promotion Options	
<input type="checkbox"/>	<input type="checkbox"/>	Public Relations Options	
<input type="checkbox"/>	<input type="checkbox"/>	New Media Options and Advantages	
<input type="checkbox"/>	<input type="checkbox"/>	Methods to Evaluate Marketing Success	
<input type="checkbox"/>	<input type="checkbox"/>	Brand Development	
<input type="checkbox"/>	<input type="checkbox"/>	Additional Resources on Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Special Considerations of Service Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Other	
<input type="checkbox"/>	<input type="checkbox"/>		

Marketing Skills Inventory



(To Be Completed by Each Team and the Organization as a Whole)



Enhancement Needed		Area of Skill	Comments
Team	Organization		
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Our Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Competitors Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Our Organization's Capabilities and Service Preferences	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Create Our Mission, Vision and Values	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Create Components of a Marketing Plan	
<input type="checkbox"/>	<input type="checkbox"/>	Ability To Segment Our Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Key Potential Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Key Potential Customers	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Customer Needs and Wants	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Utilize Key Market Research Tools	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Forecast Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Develop a Strong and Meaningful Marketing Message	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Select Marketing Media	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify and Utilize Advertising Options	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify and Utilize Sales Promotion Options	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify and Utilize Public Relations Options	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Utilize New Media Options and Advantages	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Evaluate Marketing Success	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Develop a Strong Brand Message	
<input type="checkbox"/>	<input type="checkbox"/>	Ability to Identify Additional Resources on Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Ability Market Services	
<input type="checkbox"/>	<input type="checkbox"/>	Other Relevant Skills	
<input type="checkbox"/>	<input type="checkbox"/>		

Marketing Experience Inventory



(To Be Completed by Each Team and the Organization as a Whole)



Enhancement Needed		Area of Skill	Comments
Team	Organization		
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Competitors Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Our Organization's Capabilities and Service Preferences	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Creating Our Mission, Vision and Values	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Creating Components of a Marketing Plan	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Segmenting Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Key Potential Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Key Potential Customers	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Customer Needs and Wants	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Utilizing Key Market Research Tools	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Market Forecasting	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Developing Marketing Messages	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Selecting Marketing Media	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying and Utilizing Advertising Options	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying and Utilizing Sales Promotion Options	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying and Utilizing Public Relations Options	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying and Utilizing New Media Options	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Evaluating Marketing Success	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Developing a Strong Brand Message	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Identifying Additional Resources on Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Experience in Service Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Other Relevant Experience	
<input type="checkbox"/>	<input type="checkbox"/>		

Marketing Attitude Inventory



(To Be Completed by Each Team and the Organization as a Whole)



Enhancement Needed		Attitudes	Comments
Team	Organization		
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Competitors Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Our Organization's Capabilities and Service Preferences	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Creating Our Mission, Vision and Values	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Creating Components of a Marketing Plan	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Segmenting Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Key Potential Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Key Potential Customers	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Customer Needs and Wants	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Utilizing Key Market Research Tools	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Market Forecasting	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Developing Marketing Messages	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Selecting Marketing Media	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying and Utilizing Advertising Options	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying and Utilizing Sales Promotion Options	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying and Utilizing Public Relations Options	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying and Utilizing New Media Options	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Evaluating Marketing Success	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Developing a Strong Brand Message	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Identifying Additional Resources on Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Attitudes toward Service Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Other Relevant Attitudes	
<input type="checkbox"/>	<input type="checkbox"/>		

Marketing Systems and Resources Inventory



(To Be Completed by Each Team and the Organization as a Whole)



Enhancement Needed		Systems and Resources	Comments
Team	Organization		
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Competitors Strengths, Weaknesses, Opportunities and Threats	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Our Organization's Capabilities and Service Preferences	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Creating Our Mission, Vision and Values	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Creating Components of a Marketing Plan	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Segmenting Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Key Potential Markets	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Key Potential Customers	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Customer Needs and Wants	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Utilizing Key Market Research Tools	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Market Forecasting	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Developing Marketing Messages	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Selecting Marketing Media	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying and Utilizing Advertising Options	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying and Utilizing Sales Promotion Options	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying and Utilizing Public Relations Options	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying and Utilizing New Media Options	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Evaluating Marketing Success	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Developing a Strong Brand Message	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Identifying Additional Resources on Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Systems for Service Marketing	
<input type="checkbox"/>	<input type="checkbox"/>	Other Relevant Systems	
<input type="checkbox"/>	<input type="checkbox"/>		

PTManager.com
KovacekManagementServices
 (586) 774-5774
 Pkovacek@PTManager.com



My Team's Marketing Action Plan

Use this section to develop an action plan for your team. Each team should develop a team action plan before the team leaders come together to create an organizational action plan. The final team action plan should be shared with each individual on the team so that each individual's personal action plan can be reviewed in the context of the team's action plan.

Specific Activities	My Team's Actions	Timeline	Measurable End Point
Marketing Knowledge Development			
Marketing Skill Development			
Marketing Attitude Adjustment			
Integration Of Marketing Into Organizational Mission, Vision, Values			
Other			
Other			

Which areas are most problematic for your team? Which areas do you feel your team will need the most assistance with?

What support systems will need to be in place to help your team succeed as you address your problem areas?



My Organization's Marketing Action Plan

Use this section to develop an action plan for your entire organization. The final organizational action plan should be shared with each team and reviewed in the context of each team's action plan.

Specific Activities	My Organization's Actions	Timeline	Measurable End Point
Marketing Knowledge Development			
Marketing Skill Development			
Marketing Attitude Adjustment			
Integration Of Marketing Into Organizational Mission, Vision, Values			
Other			
Other			

Which areas are most problematic for your organization? Which areas do you feel you will need the most assistance with?

What support systems will need to be in place to help your organization succeed as you address your problem areas?
