

Open Source Marketing Checklist

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Introduction

Marketing Preparation:

- _____ We know our Customers/ Clients.
- _____ We completed our homework and built “Personas” for each Customer/ Client type.
- _____ We understand our Customers’/ Clients “Wants” from their point of view.
- _____ We customized a product/ service package to meet our Customers’/ Clients’ greatest needs.
- _____ We tested, and re-tested each assumption and know that our Marketing hypothesis is correct.

Step #1: Getting Started – Who are our Customers

- _____ We know our Customers/ Clients in “excruciating, intimate detail.
- _____ We have a separate marketing campaign for each Customer/ Client group.
- _____ We have prioritized our Customer/ Client groups, and know which group we will market to first, next, etc.
- _____ We hold back on developing product/ service packages until we have identified our priority Customers/ Clients.
- _____ We focus upon “best of breed” and the “highest quality” components
- _____ We determine if there are enough Customers/ Clients to make the marketing campaign successful.
- _____ We test to determine what portion of market share we can reasonably expect to capture.

Methods of Marketing Research

- _____ We use a mix of surveys, focus groups, observation to determine the real-world needs of our Customers/ Clients.
- _____ Our marketing research is conducted before we develop a product, and our product/ service/ program development is based upon our market research.
- _____ We build a trial marketing campaign before investing heavily in a major product/ service/ program rollout and before launching a major advertising, publicity and marketing blitz.

Step #2: Discover “Wants” First – Develop Products Second

- _____ We assume that we “Do Not Know” what is best for our Customers/ Clients until we ask them, and even then until we “test” to find out if they really know.
- _____ We do not trust what our Customers/ Clients say, but, we test by requiring a “Vote” that costs money, requires time, effort, difficulty or some commitment so that we can be sure that our hypothesis is correct.
- _____ We tested, surveyed and re-tested, and we know what products/ services bring benefits to our Customers/ Clients.
- _____ We tested, surveyed and re-tested, and we know what products/ services eliminate the most pain for our Customers/ Clients.
- _____ We focused upon benefits to our Customers/ Clients and matched these with “What our Customers/ Clients Want.”
- _____ Our tests to pre-qualify our Customers’/ Clients’ wants required purchase, energy, commitment and difficulty; not just an answer to a question.

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- _____ We have a tested basis for determining that the demand for our product/ service is sufficient to proceed with the project.
- _____ We tested and know that our product/ service will “over deliver” in meeting Customer/ Client expectations
- _____ We only develop what our Customers/ Clients want, and then only after we are sure that there are enough Customers/ Clients that want that solution to make the development worthwhile and profitable.

Step #3: What makes our “Offer” Different?

- _____ Our product/ service package is unique.
- _____ Our “Offer” differentiates us from all our competitors and strategic partners.
- _____ We crafted a “one sentence or less” summary of what our product/ service package delivers for our Customers/ Clients.
- _____ We list the key benefits to our Customers/ Clients as a descending list of “Bullet Points.”
- _____ We provide bonuses with our “Offer” and each of these bonuses can stand alone in terms of the perceived value our Customers/ Clients ascribe to them.
- _____ We focus upon quality, and highlight the “best of breed” nature of our product/ service/ program, focus upon our delivery of promised benefits and our stellar customer service.

Step #4: Testimonials and Case Studies

- _____ Our Testimonials and Case Studies pass the “People like me” test.
- _____ Our Testimonials and Case Studies address the central problem that our Customers/ Clients face, or, they address the benefits that our Customers/ Clients want most.
- _____ The problems that our product/ service package address meet the “Just like my problem, or worse” test.
- _____ We imply that if the Customer/ Client achieves results that are “even just part of what that people who provide the testimonials and case studied achieved,” things would be “pretty good.”

Step #5: Overcoming Objections

- _____ We know what objections prospective Customers/ Clients will raise because of our product/ service testing.
- _____ We have crafted a positive reason that overcomes the most important Customer/ Client objections to our product/ service package and place them in our promotional “Offer.”
- _____ We have crafted a positive reason that overcomes minor Customer/ Client objections to our product/ service package and place them in a Product/ Service Package FAQs document.
- _____ We have a clear process in place for gathering Customer/ Client objections, and a clear policy for thanking Customers/ Clients for helping us.
- _____ We have a clear process in place for converting Customer/ Client objections and complaints into benefits, and for using these “gifts” as the basis for product/ service development and upgrades to our products/ services.

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Step #6: Removing Risk with Guarantees

- _____ We list every risk to adopting our product/ service that our Customers/ Clients perceive.
- _____ We understand that adopting any product/ program/ service carries risks.
- _____ We understand that adopting any product/ program/ service launches an “Opportunity Cost.”
- _____ We appreciate that employees in any bureaucracy “go out on a limb” when recommending any product/ service/ program, and we provide warranties, guaranties and assurances to ensure that risks of adopting our product/ service/ program are minimized.
- _____ We understand that the major risk in the adoption of our product/ service/ program in the public schools is the risk of “Under Funding,” and we ensure that we communicate (in a transparent manner) the true costs of implementing our product/ service/ program.
- _____ We understand that the major risk of an employee in the adoption of our product/ service/ program in the public schools is the risk of making their supervisor “look bad” if the project goes awry.
- _____ We understand that the major risk of making a recommendation in a bureaucracy such as a school district is that the “right recommendation” plus the “wrong funding” “yields minimal results,” and that the “recommender will be blamed.”
- _____ We recognize that “Cost-free Software Licensing” fails to remove the risks that prospective Customers/ Clients experience, so we redouble our efforts to understand the risks from their perspective, and redouble our efforts to provide Warranties, Guarantees and other methods of risk mitigation.
- _____ We recognize the “Cost-Free Software Licensing” represents a small amount of the deployment, management, and maintenance costs associated with our product/ service/ program package.
- _____ We recognize the “Cost-Free Software Licensing” represents a tiny (almost trivial) amount compared to the real-world requirement for adequate training and professional development costs associated with our product/ service/ program package.
- _____ We build assurances into our product/ service/ program package that are the equivalent of a “Double the money that you invest in the entire solution” guarantee so that our Customers/ Clients assume no risk.
- _____ We understand that the success of instructional products/ services/ program packages depends upon teachers, and we involve teacher in every step of the planning and development process.
- _____ We recognize the tendency of school districts to under fund projects of all kinds, and then blame teachers for the mediocre results; so we ensure that teachers or product/ service/ program “Partners” in every project initiative.

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Step #7: Promotion Strategies

- _____ We know how our product/ service/ program package benefits our Customers/ Clients, and we have crafted a Unique Service Position/ Unique Selling Proposition (USP) that communicates these benefits.
- _____ The benefits that our product/ service/ program package provides are compelling and precious to our Customers/ Clients.
- _____ Our Customers/ Clients are “hungry” for the benefits that our product/ service/ program package provides.
- _____ We build strong emotion and a sense of urgency so that our Customers/ Clients feel as though they would “lose out” if they fail to capitalize on the opportunity to grab our product/ service/ program.

Highlight a USP - a Unique Selling Proposition/ Unique Service Proposition

- _____ We differentiate ourselves by defining what makes our product/ service/ program different, better...irresistible.
- _____ We make sure that our solution is customized and not like any of our competitor’s solutions.
- _____ We understand that we cannot successfully market a product/ service/ program or solution that is available from multiple sources and that something has to differentiate our solution from all the other ones on the market.

“Never Fall in Love” with your Product

- _____ We know that our “Offer” is more important than our product/ service/ program in gaining Customer/ Client acceptance.
- _____ We find the market first before developing a product, and then we create the product that the “Market” wants.
- _____ If our product/ service/ program falters and loses market share, we improve it, replace it, or “dump it;” and we do so without emotion or attachment.
- _____ We recognize that “price” is almost never the real issue in marketing our product, and that the real issues are: Trust, Confidence in us as the Solution Provider, Mutual Respect, and our Relationship with the Customer/ Client.
- _____ We recognize that these considerations are usually absent in Open Source promotions in our schools, and we take steps to ensure that we enter into a Partnership with our Customers/ Clients.
- _____

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Step #8: Writing a Marketing Plan

- _____ We build our marketing plan with a template.
- _____ We do our homework and explore our assumptions and expectations.
- _____ We “get honest” and evaluate our product/ service/ program package in light of the strengths of our competitors.
- _____ We craft an “Offer” that over delivers value to our Customers/ Clients, while providing valuable bonuses, each with additional value.
- _____ We craft an “Offer” that assures Customers/ Clients that we assume all the risk because we include substantial Warranties and Guarantees.
- _____ Our promotion includes Testimonials and Case Studies that build emotion and promote a desire for our product/ service/ program package.
- _____ Our promotion includes answers to the probable objections that Customers/ Clients can be expected to raise, and we answer these before the Customers/ Clients raise them.
- _____ Our promotion includes a “Call to Action” that asks the Customer/ Client to act at once to obtain the benefits of our “Offer.”
- _____ We make it easy for the Customer/ Client to order by offering multiple pathways for ordering.
- _____ We follow-up by delivering more than we promised...quickly, efficiently.
- _____ We provide stellar Customer Service once the
- _____ We have a written plan in place and we have instituted a process for upgrading our product/ service/ program at specified intervals.
- _____ We have a written plan in place and we have institutes a process for handing “bugs,” defects, glitches and other “catastrophes” that slipped through our quality control process.

Turning Features into Benefits

- _____ We find “high impact” benefits and relate the features of our product/ service/ program only as supporting evidence for these benefits.
- _____ We list benefits as bullet points in descending order of impact.

Telling a Compelling Story

- _____ We make the marketing materials come alive with human interest stories about real people.
- _____ Our stories help Customers/ Clients to identify with the people in our stories.
- _____ Our stories show how easy and convenient it is to use our product/ service/ program.

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Open Thinking

- _____ We keep an open mind; eliminate “preconceived notions” about what our Customers/ Clients need, and focus upon what our testing proves that our Customers/ Clients want.
- _____ We are careful to avoid “competition-thinking and develop partnerships, joint ventures strategic alliances and other collaborations when these are for the good of our Customer/ Clients.
- _____ When marketing to bureaucracies such as school districts, we are careful to survey and test our “Offer” with all stakeholders by establishing an open dialog and by accepting that the complaints and objections that we receive about our product/ service/ program are gifts that tell us how to improve our market position and how to improve our market share.

The “Marketing Problems” with Open Source

- _____ We recognize that Open Source projects/ services/ programs in our schools teaching and learning initiatives; and that these are never “software-only or even “software-based” solutions.
- _____ We only promote Open Source projects/ services/ programs that have measurable instructional goals that are based upon solid research.
- _____ We only promote Open Source projects/ service/ programs that have a reasonable budget, especially adequate funding for professional development because we recognize the supporting under funded projects only gives a “bad name” to Open Source in the long run.
- _____ We recognize the shortcoming of previous Open Source promotion efforts and strive to overcome these by applying basic marketing principles.
- _____ We identify policies and procedures and ensure that all members of our organization adhere to our marketing strategy.
- _____ We identify marketing fiascos such as “Badmouthing the Competition,” focusing on “Free and Cheap,” and “competing on Price,” and we take steps to keep our organization free from such faux pas and “Shoot ourselves in the Foot” behaviors.
- _____ We are careful to promote only high-quality Open Source solutions, and avoid lumping all Open Source software into the same category because some Open Source products are of high quality and others are less so.
- _____ We are careful to honor and praise the contributions of teaches, and we court teachers as project planners, project gatekeepers, and partners.
- _____ We are careful to cost our products/ services/ programs with honest and reasonable costs, and careful to include costs for training and professional development, technical support, infrastructure and contingency planning.
- _____ We are careful to calculate the time required for teachers to ramp up new procedures (often up to three years), and careful to ensure that there is a research-documented (cause and effect) connection between our project/ service/ program and the measurable, curricular student outcomes (results) that we guarantee.

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Avoid the “Technology Integration Model”

We avoid any association with the failed “Technology Integration” movement, and focus upon teaching and learning goals and measurable instructional outcomes. (The kind that were missing in most Technology Integration efforts.)

We insist upon adequate training and professional development, adequate funding, and insist upon reasonable time frames for teachers to retool their delivery and management of instruction in implementing Open Source solutions.

We are careful to package everything that teachers need (including professional development), and careful to make the “learning curve tiny.”

We communicate our understanding that Technology Integration Initiatives, like Open Source Solutions, must focus upon teaching and learning goals and must focus upon measurable curricular outcomes.

We insist upon teacher involvement in the planning, gate keeping and evaluation of every project.

We recommend that all tools required for the product/ service/ program be available to teachers at school and at home, and that these tools be provided at school district expense.

We (carefully) test teacher implementation of our product/ service/ program components and ensure that the teacher curve remains small by automating, by building connectors to existing content and management infrastructures, and by allowing for small steps in an iterative deployment process. (We realize that it takes teachers about three years to replace existing instructional delivery and instructional management habits with updated and more effective strategies, and we shore up teachers change efforts with in-classroom and online follow-up support.

We ensure that all trainers have taught the subject being trained to actual, similar-aged students before beginning any training program.

We support teachers by recommending that all training be delivered with full compensation to teachers for any training time because this increases teacher buy-in of the initiative and because this decreases stonewalling, feet-dragging, and sabotage of our improvement projects.

Most Important!

We insist that all Technology-Related projects be undertaken with a research-based, tested, measurable, direct connection to improved content-based learning outcomes.

We also believe that there are no other types of projects (except pilot project for testing under experimental supervision) that should be operated in our schools.

We have the courage to state that all projects in our schools are instructional projects, and that labeling a project as a “Technology Integration” effort weakens its focus and its accountability.