



Marketing and Sales Plan Execution Checklist

Market Research & Analysis Validation

Confirm initial assumptions and refine strategies based on current market conditions. This ensures your plan is grounded in reality.

Current Commodity Price Fluctuations (Compared to Initial Plan)

Summary of Recent Farmer Surveys/Feedback (if conducted)

Impact of Weather Patterns (compared to forecast)

- ☐ No Significant Impact
- ☐ Minor Impact
- ☐ Moderate Impact
- ☐ Significant Impact

Upload Recent Competitor Activity Reports

Date of Last Market Analysis Update

Enter date...

Notes on Observed Changes in Farmer Purchasing Behavior

Write something...

Target Audience Refinement

Verify target audience profiles are still accurate and adjust messaging based on latest data or farmer feedback.

Summarize Recent Farmer Interviews/Surveys

Write something...

Which Farmer Segments are Showing Increased Interest?

- ☐ Row Crop Farmers
- ☐ Livestock Farmers
- ☐ Orchard/Vineyard Farmers
- ☐ Specialty Crop Farmers
- ☐ Organic Farmers

Average Age of Target Farmer (Updated)

Enter a number...

Primary Information Source for Farmers (Updated)

- ☐ Industry Publications
- ☐ Online Forums/Social Media
- ☐ Trade Shows/Events
- ☐ Direct Sales Reps
- ☐ Dealer Networks

Describe any shifts in Farmer Concerns/Priorities

Write something...

Preferred Communication Method (Updated)

- ☐ Email
- ☐ Phone
- ☐ Text Messaging
- ☐ Website/Online Portal
- ☐ Social Media

Estimated Farm Size (Average, Acres/Hectares)

Enter a number...

Content Creation & Distribution

Ensure timely creation and distribution of marketing content across relevant channels (social media, email, website, industry publications).

Content Channels Used

- ☐ Website/Blog
- ☐ Facebook
- ☐ Instagram
- ☐ YouTube
- ☐ LinkedIn
- ☐ Email Newsletter
- ☐ Industry Publications
- ☐ TikTok


Content Calendar Review Date

Enter date...

Brief Summary of Content Created This Period

Write something...

Upload Sample Content (e.g., Blog Post, Social Media Graphic)

 Upload File

Number of Blog Posts Published

Enter a number...

Number of Social Media Posts Published

Enter a number...

Content Performance - Overall Assessment

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Needs Improvement

Notes on content performance and planned adjustments

Write something...

Digital Marketing Campaign Management

Track and optimize online advertising campaigns (Google Ads, Social Media Ads) for maximum ROI.

Daily Ad Spend (USD)

Enter a number...

Website Traffic (Daily Average)

Enter a number...

Click-Through Rate (CTR) - Average

Enter a number...

Primary Ad Platform

- ☐ Google Ads
- ☐ Facebook Ads
- ☐ Instagram Ads
- ☐ LinkedIn Ads
- ☐ Other (Specify)

Targeting Parameters (Check all that apply)

- ☐ Location (Region/State)
- ☐ Farm Type (e.g., Corn, Soybeans)
- ☐ Farm Size
- ☐ Crop Stage
- ☐ Age Group (Farmer)
- ☐ Income Level

Last A/B Test Run Date

Enter date...

Notes on Recent Campaign Adjustments

Write something...

Sales Team Enablement & Training

Equip the sales team with the knowledge, tools, and resources they need to effectively sell your products/services. Includes product updates, competitor analysis, and sales scripts.

Review & Update Product Knowledge Materials

Write something...

Competitor Analysis – Key Messaging & Pricing

- ☐ Company A
- ☐ Company B
- ☐ Company C
- ☐ Other (Specify)

Updated Sales Scripts/Talking Points (if applicable)

 Upload File

Target Deal Size per Sales Rep (Q[Quarter Number])

Enter a number...

Current Primary Objection Handling Training Method

- ☐ Role-Playing
- ☐ Presentation
- ☐ Written Guide
- ☐ Other

Next Product Update Training Session

Enter date...

Summary of recent Customer Feedback and adjustments to sales approach

Write something...

Channel Partner Management (if applicable)

Maintain strong relationships with distributors, retailers, and other channel partners. Ensure alignment on goals and messaging.

Number of Channel Partners Active

Enter a number...

Partner Satisfaction Level (Recent Survey)

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

Summary of Recent Partner Feedback

Write something...

Date of Last Partner Business Review Meeting

Enter date...

Training Programs Delivered to Partners (Last 6 Months)

- ☐ Product Knowledge
- ☐ Sales Techniques
- ☐ Marketing Materials
- ☐ Regulatory Compliance
- ☐ Digital Marketing

Joint Sales Targets Achieved (Percentage)

Enter a number...

Specific Actions Required to Strengthen Partner Relationships

Write something...

Trade Show & Event Execution (if applicable)

Plan and execute participation in relevant agricultural trade shows and events. Track leads and measure ROI.

Trade Show/Event Date

Enter date...

Event Type (e.g., National, Regional, Local)

- ☐ National
- ☐ Regional
- ☐ Local

Booth Size (sq ft)

Enter a number...

Booth Design File (e.g., CAD, PDF)

 Upload File

Estimated Lead Generation

Enter a number...

Marketing Materials to Distribute

- ☐ Brochures
- ☐ Flyers
- ☐ Product Samples
- ☐ Giveaways
- ☐ Demo Videos

Event Objectives & KPIs

Write something...

Event Location

 Set My Current Location



Sales Process Monitoring & Optimization

Track key sales metrics (conversion rates, average deal size, sales cycle length) and identify areas for improvement.

Average Deal Size (USD)

Enter a number...

Sales Cycle Length (Days)

Enter a number...

Conversion Rate (Lead to Opportunity)

Enter a number...

Conversion Rate (Opportunity to Sale)

Enter a number...

Primary Sales Obstacle Identified (Based on recent sales calls)

- ☐ Price Concerns
- ☐ Lack of Awareness
- ☐ Competition
- ☐ Timing
- ☐ Product Feature Concern
- ☐ Other

Summary of Sales Team Feedback on Current Process

Write something...

Date of Last Sales Process Review Meeting

Enter date...

Which Sales Process Steps Require Immediate Improvement?

- ☐ Lead Qualification
- ☐ Product Demo
- ☐ Proposal Creation
- ☐ Negotiation
- ☐ Contract Signing

Proposed Action Items to address identified issues

Write something...

Customer Relationship Management (CRM) Updates & Analysis

Ensure CRM data is accurate and up-to-date. Analyze customer interactions to identify trends and opportunities.

Last CRM Data Sync Date

Enter date...

Number of New Customer Records Added

Enter a number...

Number of Customer Records Updated

Enter a number...

Summary of Recent Customer Feedback (from CRM)

Write something...

CRM Segmentation Strategy Review Needed?

☐ Yes

☐ No

Which CRM reports are currently reviewed regularly?

- ☐ Sales Pipeline Report
- ☐ Customer Churn Report
- ☐ Marketing ROI Report
- ☐ Customer Lifetime Value Report

Notes on Identified CRM Data Inconsistencies (if any)

Write something...

Reporting & Performance Review

Regularly monitor key performance indicators (KPIs) and report on progress against goals. Identify what's working and what needs adjustment.

Total Sales Revenue (vs. Target)

Enter a number...

Website Traffic (Unique Visitors)

Enter a number...

Lead Generation (Qualified Leads)

Enter a number...

Conversion Rate (Lead to Customer)

Enter a number...

Customer Acquisition Cost (CAC)

Enter a number...

Overall Campaign Effectiveness (Subjective Rating)

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Fair
- ☐ Poor

Summary of Key Findings & Insights

Write something...

Date of Review

Enter date...

Which marketing channels performed best?

- ☐ Social Media
- ☐ Email Marketing
- ☐ Website
- ☐ Trade Shows
- ☐ Print Advertising