

How to use this document

Below are the basic marketing items every company should have in place. This is by no means an extensive list, but it's a solid start and items we frequently see missing from companies looking for growth and/or stability.

The list is organized into [leadership](#), [management](#), and [execution](#) functions so you can hand this document to different people as needed.

Make sure you have the following in place:

Leadership checks

It starts with leadership. If you don't know what your direction is, it's going to be impossible for a marketing agency or your marketing team to develop tactics that move the company forward...since you haven't defined what "forward" means.

These checks ensure you have a clear direction (your Vision), a way to measure progress towards that Vision (KPIs), and the budget set aside to be successful.

Leadership	Document, share, and live your company Vision	<input type="checkbox"/>
	<ul style="list-style-type: none"> Your vision statement defines your focus and vision for where the company is going This will serve as a guide for your marketing activities, so they are aligned with your vision This may be your vision from your VTO or an extension of that if you're running on EOS 	
	Define and set up tracking for your Key Performance Indicators (KPIs)	<input type="checkbox"/>
	<ul style="list-style-type: none"> KPIs are metrics to measure and ensure you're moving towards your vision Like your vision statement, all efforts focus on affecting your KPIs KPIs go on your marketing Score Card to report to the leadership team for accountability and alignment 	
	Define your marketing Budget and forecast expenses for the next 12 months	<input type="checkbox"/>
	<ul style="list-style-type: none"> Your budget gives you a baseline to improve upon and acts as a reality check when considering impromptu marketing projects – having a budget helps you make decisions faster and cuts down on waste 	

Management checks

Your vision is clear, you know your KPIs, and have set aside the budget to get there. Do you have the right messaging framework, target market clarity, and the right team to move towards that vision? At the management level of marketing, it's about having the right oversight and processes to stay aligned with your vision.

Management	<p>Clear Brand messaging and guidelines</p> <ul style="list-style-type: none"> Your brand message is what you want to be known for This includes what you say, where you say it, what you look like, your tone, value proposition, company descriptions, and more Your guidelines should be clear and usable by everyone at the company 	<input type="checkbox"/>
	<p>Understand your Target Markets in priority order</p> <ul style="list-style-type: none"> Really useful target market definitions are simple and clear and reinforced constantly Every effort should be speaking directly to your target market's pain points, jobs to be done, fears, objections, etc. Prioritize your target markets to stay focused on your biggest opportunities first 	<input type="checkbox"/>
	<p>The Right People in the Right Seats on your marketing team (RPRS)</p> <ul style="list-style-type: none"> Make sure you have the right mix of skills (staff, agencies, vendors) to get the job done If you have skill gaps, either train in-house (upskill) or outsource carefully 	<input type="checkbox"/>
	<p>List of Competitors</p> <ul style="list-style-type: none"> List direct competitors and any other competitors Compare brand messages, product offers, ads, website traffic, marketing tactics etc. to get a sense of the competitor landscape and your place in it 	<input type="checkbox"/>
	<p>Process to ensure Sales and Marketing communicate often</p> <ul style="list-style-type: none"> Build in processes to ensure clear collaboration between sales and marketing including meeting schedule and agenda framework The more collaboration between sales and marketing, the better leads will be and the better your close rate will be Create a Service Level Agreement (SLA) between each department to create accountability 	<input type="checkbox"/>
	<p>Product descriptions and roadmaps</p> <ul style="list-style-type: none"> List your products with pricing and short descriptions leading with your value propositions Document your core product roadmaps and share with marketing and customers 	<input type="checkbox"/>

Process to nurture **Strategic Partnerships**

- Strategic partners also serve your target market and could be OEM partners, tech providers, fractional CFOs, outsourced IT teams, etc.
- Document your process to follow up at regular intervals to keep the relationship warm



Execution & tactics checks

The biggest marketing mistake we see is businesses starting with the fun, exciting tactics without any strategy in place. It's fun, but rarely effective.

The most successful businesses use their vision to identify the right mix of tactics to reach their target markets. Often these tactics are misaligned and operate in silos which usually means missed opportunities and lots of cashflow leaks. That's why it's essential to examine your tactical foundations to make sure you're using the best mix of tactics.

Execution Tactics

Do you know how you're using each of the following **tactics** and what impact they have on your business?

- Website
- Search Engine Optimization (SEO)
- Tracking and analytics (i.e., conversion tracking)
- Paid ads (PPC)
- Content marketing
- Social media
- Email and marketing automation
- Collateral
- PR, AR, and events
- Marketing tech stack



If you would like help addressing these items, we cover all of these and much, much, more as part of our [Foundations First Marketing program](#).