Foundations First.

Quarterly Marketing Checklist

Avoid costly marketing leaks.

What this is...

Sometimes we get complacent and feel like a lot of marketing is “set it and forget it.” We forget how long it’s been since we looked at our brand messaging or tested our funnel.

Fear not! We’re here to help.

We’ve put together a quick and easy quarterly checklist to make sure you are running on all cylinders. And let’s be honest, it’s better you find the glitches than your customers!

On the following pages we’ll guide you through some of the major items to check each quarter.

Grab a coffee, soda, or adult beverage and let's get you a clean bill of marketing health.

Vision & Purpose

- ❑ Is your company vision still accurate?

Make sure everyone is still aligned with your company vision. Once a year just isn't enough and plastering your vision as a mural isn't either.

Check in with everyone each quarter to make sure it's crystal clear where you're going. Celebrate the wins, learn from the losses, and keep moving forward with the end goal in mind.

Target Markets

- ❑ Are your target markets accurate? Can you add or clarify any insights?

You probably reviewed your target markets in detail when you first documented them. But where are they now?

Remind the team of your target audiences and take a few minutes to discuss how they have changed and what you can do better to engage with them.

Have their main pain points changed over the last quarter? Has something major happened (like a pandemic) that might change the way you talk to your target market?

Budgets

- ❑ Are you over/under your budget?
- ❑ Check your chart of accounts and make sure you've accounted for everything.

That's right! Break out your budgets and see where you're at so you can make adjustments for the next quarter.

How will your budget numbers change your decisions for the next quarter?

Staffing & Vendors

- ❑ Are there any professional development opportunities for your staff?
- ❑ Do you need to renew vendor contracts?

Don't neglect your contractors and external vendors. They are part of your marketing team. Take a minute to make sure they are happy and cranking out high-quality work for you. Check in to see how you can improve your relationship. You'd be shocked how often a 5 minute check-in conversation can streamline workflows and save a ton of time and money.

What about your in-house staff? Are there professional development needs or opportunities? Is there someone who stands out? It takes two minutes to shoot them a quick email to tell them how much you appreciate their efforts.

Consider sending a coffee or treat via a service like Thnks that lets you quickly send a coffee or other small treat. It's a small gesture that can make someone's day.

KPIs

- ❑ Are you over/under on your KPI estimates?
- ❑ Any problem areas?
- ❑ Do you need to add or remove any KPIs? Watch out for too many KPIs!

KPIs aren't just there to look pretty. They should drive your decisions.

Are the numbers accurate? Are they even the right numbers to give you an honest sense of where you're at?

Are there any vanity metrics that are interesting but not really performance indicators? Get them off the list! Don't be a victim of KPI bloat where you end up with so many numbers that nothing is useful.

Product Marketing

- ❑ Is product positioning clear and resonating with target markets?
- ❑ Check sales and product collateral.
- ❑ Are you spending your time and energy on the right products and features?

Time to check with what the rest of the company is saying about the products.

Has the sales team or account managers heard something interesting about how customers are using the products?

Strategic Partnerships

- ❑ Have you had contact with all of your strategic partners in the past quarter?

Grab your strategic partners list and pick up the phone or shoot them a quick email to see what they're up to. Keep those relationships solid.

Don't just reach out when you need something. Send them a quick note to check in, but make sure it's personal and relevant to them.

Sales Process & Alignment

- ❑ How can marketing add automations to the sales process?
- ❑ Are there blockers in the sales process?

Look at your sales pipeline stats. Where are customers staying for way too long? Can you do something to unstick them or move them to a nurture sequence to keep the focus on prospects that are more ready to buy?

Brand Messaging

- ❑ Is the brand messaging document accurate?
- ❑ Does everyone have a copy of the brand messaging?
- ❑ Print out examples of your website, business cards, trade show flyers, email signatures, blog posts, etc. Does it all look and sound the same?

Don't let your brand messaging documentation gather virtual dust on desktops. It might be time to print them out and have people attach the key messages to their monitors.

Whatever you do, keep that brand messaging alive so everyone is saying the same thing.

Competitor Analysis

- ❑ Look at your top competitor websites for insights into new messaging or products.

Has a competitor rebranded? Have they launched a cool new feature? Did they add an awesome new case study you should be aware of?

Take a minute to also check out what kinds of lead generation content they are promoting. Maybe it's a webinar, maybe it's a new whitepaper. It's always great to get some ideas for what your competitors are saying to your prospects.

Your Website

- ❑ Test your site across devices.
- ❑ Test your web forms.
- ❑ Test your header and footer links.
- ❑ Test your backup procedure.
- ❑ Is your website up to date (plugins, etc.)?
- ❑ Review your domains to make sure they are set to auto renew or ditch ones you don't need anymore.

Websites are not "set it and forget it." Secret shop yourself and make sure your website is performing as it should. Without a doubt, we always find little things to improve. Sometimes it's big things like a lead gen form not working.

Tracking & Analytics

- ❑ Are your conversion goals defined properly?
- ❑ Confirm your goals are integrated with any ad accounts or your CRM.
- ❑ Review your cookie scripts and make sure they are all still needed.
- ❑ Check who has access to your tracking tools.

Check your conversion definitions! You're making some pretty big decisions based on conversion numbers. You better be sure you know what a "conversion" really is. If there are a lot of cooks in the kitchen you better watch out in case someone changes your conversion to be a simple page view (yes, this happens a lot).

SEO

- ❑ Scan your site titles and descriptions.
- ❑ Conduct a site health crawl.

Make sure your SEO basics are still solid. Every quarter, do a quick review of your titles and descriptions

We often write titles and meta descriptions once and forget about them - sometimes for years.

Keep an eye out for any errors and easy improvements. Remember, websites are iterative. If you can make small improvements every quarter you'll be in good shape.

PPC/Paid Ads

- ❑ Check all running ads - make sure copy is accurate.
- ❑ Review competitor ads.

Ad copy can get stale. Even that evergreen campaign that always brings in leads needs a refresh from time to time.

Check ads that competitors are running. Do a more in-depth analysis of new phrases and trends your ideal customers might be seeing. Be sure to check Google Ads as well as social ad campaigns.

Social Media

- ❑ Are all networks consistent in branding?
- ❑ Are bio links accurate?
- ❑ Are there any new features for your core social platforms?
- ❑ Check who has access to each network.

You likely have more than one cook in the kitchen when it comes to publishing and managing your social networks. Without fail, someone at some point will go rogue and swap out the banner/cover image or avatar. Over time this can dilute your brand consistency.

Social platforms are constantly rolling out new features. Could be just a UI change or could be some cool new features you want to explore right away. Don't let your boss see your competition using the new tools first.

Even though we should all make sure "access removal" is well documented in an off-boarding process with HR, it's easy to miss details that can make your system less secure.

PR, AR, & Events

- ❑ Check trade organization and conference sites for upcoming events and opportunities.
- ❑ Review your boilerplate and/or executive bios.
- ❑ Update speaker sheets.

Schedules change. Events are cancelled or moved online. What might have been too expensive to attend last year might be virtual this year.

Brand messaging changes over time and it's important your boilerplate reflects your latest messaging.

Sometimes we're so busy being awesome we forget to update our speaker sheets with our latest presentations.

Email Marketing & Automation

- ❑ Check your delivery/blacklist status.
- ❑ Confirm company-wide email signatures are consistent (watch for any Comic Sans or Papyrus fonts).

It's imperative your email reputation remain in good standing. Check if open or deliver rates have tanked over the past 6 months (could indicate issue with DKIM or your emails going to spam). Use https://mxtoolbox.com/blacklists.aspx or similar to see if your domain is blacklisted.

Make sure all your email signature links work and the information is accurate. Ensure all signatures look consistent company-wide; watch for that rogue sales guy (or exec) who likes to use Comic Sans.

Content Marketing

- ❑ Test all lead gen workflows.
- ❑ Scan for orphaned content.
- ❑ Review content with 0 page views over the past quarter and consider removing.
- ❑ Spend 15 minutes analyzing top traffic pages for improvements.

Sometimes we're under a tight deadline for a campaign launch, and we say "oh, we'll go back and make it better later." Then a year goes by. Well, it's time.

Look at your top traffic pages - are there any improvements you can make? What about your top traffic-driving blog posts? Can you update the CTA? Make it more engaging? Spend 10 minutes and make some improvements.

Collateral

- ❑ Gather up examples of collateral (sales sheets, business cards, flyers, etc.), and check if they need updates.

We recommend printing out your collateral and spreading them out on a desk or floor. Does it all match? Does it all sound and look like it belongs to the same brand?

Did product names change? What about brand messaging? What needs to be updated?

Tech Stack

- ❑ Look at your marketing credit card statement and make sure you're using all of the software you are paying for.

Just like Netflix or Spotify those monthly subscription charges can creep in there.

Can you downgrade any subscriptions? Do you need all of those user licenses?

Keep your tech stack lean!

See, that wasn't so bad, was it?

Once you get good at your quarterly checklist, it should only take you about 30-45 minutes.

This exercise is well worth the time. Some clients simply hand it off to their marketing manager. It's a great way to end or start a new quarter.

As always, I'm here if you have questions or want guidance in taking control of your marketing and getting your marketing foundations solid.

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