

1 BUSINESS OBJECTIVES

| | |
|--------------------------|---|
| <input type="checkbox"/> | Identify and quantify any macroeconomic business cycles (e.g., quarterly buying cycles, major industry conferences, FFYE) |
| <input type="checkbox"/> | Identify and articulate all current marketing problems (e.g., brand recall, low share of voice, anemic lead generation) |
| <input type="checkbox"/> | Define S.M.A.R.T. goals: |
| <input type="checkbox"/> | Specific: The goal should be very precise with no room for misinterpretation |
| <input type="checkbox"/> | Measurable: The goal should be quantifiable and progress should be easy to track |
| <input type="checkbox"/> | Achievable: The goal should be attainable — not outlandish or unrealistic |
| <input type="checkbox"/> | Relevant: The goal should contribute to your broader, overarching goals |
| <input type="checkbox"/> | Time-bound: The goal should have a defined start and end date |

Weak Goal Example: I want to run paid social ads.

SMART Goal Example: I want to deploy a diversified paid social initiative to drive traffic to our new thought leadership blog series, raise brand awareness and increase new monthly visitors by 50% by EOY. We will use a monthly budget of \$5,000 direct-to-channel expenses split 50/50 between Facebook and LinkedIn.

Weak Goal Example: I want leads.

SMART Goal Example: I want 100 leads who are Director or VP-level decision influencers at fintech companies with annual revenues between \$20M and \$50M at an average cost-per-lead (CPL) of between \$100 and \$125 by our annual board meeting.

2 MARKET ANALYSIS

| | |
|--------------------------|--|
| <input type="checkbox"/> | Competitor & Industry Trend Analyses |
| <input type="checkbox"/> | Competitive pressures (e.g., disruptive startups vs. entrenched large enterprises) |
| <input type="checkbox"/> | Customer sentiments & preferences |
| <input type="checkbox"/> | Technological innovations |
| <input type="checkbox"/> | Market Segments |
| <input type="checkbox"/> | Customer-centric positioning statement(s) for each segment specific to their pain points |
| <input type="checkbox"/> | – Decision maker |
| <input type="checkbox"/> | – Mid-level decision influencer |
| <input type="checkbox"/> | – In-the-trenches staff |
| <input type="checkbox"/> | Personas |
| <input type="checkbox"/> | Demographics |
| <input type="checkbox"/> | – Age / gender / household income / location |
| <input type="checkbox"/> | Firmographics |
| <input type="checkbox"/> | – Company size / annual revenues / location / business focus |
| <input type="checkbox"/> | Psychographics |
| <input type="checkbox"/> | – Pain points |

3 CUSTOMER JOURNEY MAPPING

- Complete the matrix for each segment of decision makers, decision influencers and in-the-trenches staff

| Customer Journey | Awareness Phase | Consideration Phase | Decision Stage | Retention Stage | Advocacy Stage |
|---|-----------------|---------------------|----------------|-----------------|----------------|
| What is the customer thinking or feeling? | | | | | |
| What is the customer's action? | | | | | |
| What or where is the customer researching? | | | | | |
| How will we move the buyer along the journey? | | | | | |
| What are the primary touchpoints? | | | | | |

4 SUPPORTING INITIATIVES

- Influencer Marketing**
- Historical audit (e.g., previous and / or competitive successes & failures)
- Partner Marketing**
- Channel partners
- Industry organizations
- Referral Programs**
- Incentives
- Staff**
- Messaging & synchronization (e.g., email signatures, social media channels)
- Offline Campaigns**
- Trade publications
- Print advertising

5 AUDITS

| | |
|--------------------------|---|
| <input type="checkbox"/> | Campaign Audits |
| <input type="checkbox"/> | Historical audit (e.g., previous and / or competitive successes & failures) |
| <input type="checkbox"/> | Metrics (e.g., ROI, ROAS, CPL) |
| <input type="checkbox"/> | Collateral Audits |
| <input type="checkbox"/> | Comprehensive listing of available lead-gen (gated) assets |
| <input type="checkbox"/> | – Whitepapers / eBooks / webinars / research reports |
| <input type="checkbox"/> | Comprehensive listing of available brand awareness (non-gated) assets |
| <input type="checkbox"/> | – Blogs / videos / PR campaigns |

6 BRANDING

| | |
|--------------------------|---|
| <input type="checkbox"/> | Brand book |
| <input type="checkbox"/> | Style guide |
| <input type="checkbox"/> | Pre-approved creative repositories (e.g., photos, videos, vectors, icons) |
| <input type="checkbox"/> | Art files (e.g., logo vectors, layout templates, presentation templates) |

7 DIGITAL ECOSYSTEM

| | |
|--------------------------|--|
| <input type="checkbox"/> | Current Toolset |
| <input type="checkbox"/> | Website |
| <input type="checkbox"/> | – CMS platform (e.g., WordPress, Drupal, Joomla!, SiteCore) |
| <input type="checkbox"/> | – SEO (e.g., Onsite, Offsite, Technical) |
| <input type="checkbox"/> | CRM Integration (e.g., Salesforce, Hubspot, Marketo, Infusionsoft) |
| <input type="checkbox"/> | – Lead Gen form |
| <input type="checkbox"/> | – Nurturing (e.g., email automation) |
| <input type="checkbox"/> | – Advocacy |
| <input type="checkbox"/> | Social Media Channels |
| <input type="checkbox"/> | – Organic campaigns (content, cadence) |
| <input type="checkbox"/> | – Paid campaigns (budget, channels) |
| <input type="checkbox"/> | Integrations & APIs |
| <input type="checkbox"/> | Third-party connectors, payment processing |
| <input type="checkbox"/> | Roles & Responsibilities |
| <input type="checkbox"/> | Internal marketing team |
| <input type="checkbox"/> | Internal web development team |
| <input type="checkbox"/> | Agency roster |

8 METRICS & ANALYTICS

| | |
|--------------------------|--|
| <input type="checkbox"/> | Deliverables |
| <input type="checkbox"/> | KPI definition |
| <input type="checkbox"/> | Transparent access to dashboards |
| <input type="checkbox"/> | Automated custom report delivery |
| <input type="checkbox"/> | Cadence |
| <input type="checkbox"/> | Real-time, daily, weekly, monthly, Quarterly Business Reviews (QBRs) |
| <input type="checkbox"/> | Analytics |
| <input type="checkbox"/> | Value-added insights |
| <input type="checkbox"/> | Strategy & consulting |
| <input type="checkbox"/> | Baseline |
| <input type="checkbox"/> | Pre-launch assessment |
| <input type="checkbox"/> | Toolset (e.g., Google Keyword Planner, SEMrush, SimilarWeb) |

9 ACCESS CREDENTIALS

| | |
|--------------------------|---|
| <input type="checkbox"/> | Website |
| <input type="checkbox"/> | Social Media channel admins (e.g., LinkedIn, Facebook, Twitter, Instagram, YouTube, TikTok) |
| <input type="checkbox"/> | Google (e.g., Analytics, Ads, Tag Manager, Search Console) |

10 PHASED APPROACH

| | |
|--------------------------|---|
| <input type="checkbox"/> | Fix the House (with budgets, timelines and dependencies) |
| <input type="checkbox"/> | Website updates |
| <input type="checkbox"/> | Social channel cleanup |
| <input type="checkbox"/> | Brand Awareness (with budgets, timelines and dependencies) |
| <input type="checkbox"/> | PR |
| <input type="checkbox"/> | Thought leadership content marketing |
| <input type="checkbox"/> | Lead Generation (with budgets, timelines and dependencies) |
| <input type="checkbox"/> | Paid campaign deployment |
| <input type="checkbox"/> | Media buys |
| <input type="checkbox"/> | Advocacy |
| <input type="checkbox"/> | Ongoing customer satisfaction communications |
| <input type="checkbox"/> | Incentives |