

03 / PRACTICAL BUSINESS RESOURCES

Marketing strategy checklist

Connect your audience, offer, budget and channels in a focused plan built around meaningful business results.

Start with your customers

- ☐ Set one commercial goal for the next quarter. Make it specific and measurable, with a deadline and a named owner.
- ☐ Identify your best-fit customers and the work you want more of. Separate audience segments when their needs differ.
- ☐ Interview customers or review recent enquiries. Record their questions, buying triggers, objections and decision criteria.
- ☐ Map the journey from recognising a need to making an enquiry and buying. Note where people hesitate or drop out.
- ☐ Clarify your offer and why a customer should choose it. Support differentiators with evidence rather than broad claims.
- ☐ Review competitors' positioning, useful content and search visibility. Look for unmet customer needs, not just tactics to copy.

Choose a practical plan

- ☐ Audit current channels, content and enquiry sources. Identify what already brings valuable business before adding new activity.
- ☐ Select channels for each stage of the journey. Give each a clear job instead of treating every platform as essential.
- ☐ Build a realistic budget covering delivery, tools, creative production and any separate advertising spend.
- ☐ Check your team's capacity and skills. Decide what stays in-house and what needs specialist support or outside production.
- ☐ Prioritise a small number of activities by likely impact, effort and urgency. Avoid launching everything at once.
- ☐ Create a 90-day calendar with milestones, approval dates and dependencies. Assign one responsible owner to each activity.

Need a second pair of eyes? Book a free consultation.

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Prepare for delivery

- ☐ Check that your website explains the offer and provides a working next step. Fix enquiry barriers before sending more traffic.
- ☐ Plan content around real customer questions, service choices and objections. Connect guides to relevant service pages.
- ☐ Gather approved case studies, reviews and useful examples. Ensure claims are accurate and permission is recorded.
- ☐ Align messages across your website, social media, email and sales conversations. Keep business details consistent.
- ☐ For email, check consent or another valid legal basis, unsubscribe options and list quality. Never buy an unverified mailing list.
- ☐ Agree how quickly enquiries will be handled and by whom. Record follow-up steps so marketing does not end at form submission.

Measure business outcomes

- ☐ Record a baseline for qualified enquiries, conversion rate and sales. Define the same terms across marketing and sales.
- ☐ Set up appropriate conversion measurement with consent-aware tracking. Test it before relying on a campaign report.
- ☐ Use consistent campaign names and source recording. Ask new customers how they found you to supplement attribution data.
- ☐ Review results monthly against budget and customer quality. Treat attribution as an estimate, not a complete view of every sale.
- ☐ Stop, improve or expand activities based on evidence. Allow enough time for the channel to work before making major changes.
- ☐ Set the next review date and three decisions to revisit. Keep the strategy current as your customers and business change.

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