

# MARKETING STRATEGY CHECKLIST

## INTERNAL

### AUDIT

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- BUSINESS GOALS
- KPI'S AND RESULTS TO-DATE
- CROSS TEAM COMMUNICATION
- SWOT ANALYSIS + PROBLEM YOU SOLVE

## PERSONA

### DEVELOPMENT

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- RESEARCH AND SURVEY TARGET AUDIENCE
- 1:1 INTERVIEWS
- DOCUMENT TRENDS AND TAKE AWAYS
- CREATE + NAME IDEAL CUSTOMER AVATAR

## COMPETITIVE

### ANALYSIS

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- IDENTIFY 2 TOP COMPETITORS
- EVALUATE WEBSITE AND SOCIAL PRESENCE
- LIST WHAT'S WORKING AND WHAT'S NOT
- GAP IN MARKET + YOUR BRAND'S STRENGTH

# MARKETING STRATEGY CHECKLIST

## STRATEGY

### CONTENT

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- TIE TO BUSINESS GOALS + KPI'S
- PLAN CONTENT TO CUSTOMER JOURNEY
- CUSTOMER JOURNEY CONTENT
- CROSS TEAM COLLABORATION

## LEAD

### CONVERSION

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- ESTABLISH CRITERIA FOR LEAD QUALITY
- GOALS + METRICS
- VALUE PROPOSITION
- LEAD PROCESS + TRACKING + REPORTING

## CUSTOMER

### RETENTION

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- BRAND EXPERIENCE FEEDBACK
- RETENTION STRATEGY
- MARKETING PLAN
- GOALS + METRICS