

MARKETING STRATEGY CHECKLIST



Creating your first (or auditing your current) Marketing Strategy can be overwhelming. Use this handy checklist to develop the foundation for your Marketing. If you have questions or need help setting any or all of this up, please don't hesitate to [contact me!](#)

OVERALL STRATEGY

- Define your target market (based on research)
- Define your geographical target (based on research)
- Define budget amounts for ads, contractors/employees, contests, discounts, etc.
- Define Marketing goals (followers, engagement rate, etc.)
 - Evaluate Marketing goals against your mission, vision, and values
- Define your Brand – Create a document with every detail (voice style, fonts, colours, etc.)

EMAIL

- Develop a welcome sequence (1-5 emails over 1-2 weeks)
- E-commerce: Develop an abandoned cart sequence
- Create a twice/month or monthly newsletter template
- Develop a sequence for upcoming releases/new products to build anticipation

SOCIAL MEDIA

- Evaluate which channels are best for my business via research, surveys, etc.
- Set up a complete profile for each chosen channel
- Define target audience for each channel (if different)

- Have enough images prepared for several months of content (especially if using Instagram)
 - Post 3-5 pieces of content right away
- Create Content Strategy – Overall topics, days, type of posts

WEBSITE

- Can I tell what the company does upon first impression?
- Set up an email subscription signup – Make sure it is easy to find if you want to build your email list
- Can anyone walk through the site to find what they want/need? Have it tested.
- Make sure the Call to Action (Book now, Get Demo, etc.) is clear and easy to find
- Have a clear way to contact someone and get questions answered (Chatbot, email, FAQ section, etc.)
- Add Social Media Links

FINAL TOUCHES

- Re-evaluate against your mission, vision, and values
- Test website, emails, website content, etc. with target audience
- Get started one step at a time
- Audit each aspect every quarter – set up a reminder

Congratulations! You've made it through your Marketing Strategy Checklist. Now you're ready to confidently get your message out in the right way, to the right people.

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