

# MARKETING I/O CHECKLIST

*Inputs. Outputs. Inbound. Outbound. You reap what you sow.*

Stop managing your marketing from a tactical level. The following checklist will help you orchestrate your marketing more effectively, aligning business goals with tactical execution.

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## ✓ Identify Goals

*A goal without a plan is a wish.*

If your goal is to increase sales by \$500,000, how many deals does this equate to? Before you start developing a marketing strategy, it is vital to understand what you are aiming for. This will also help inform the target, channels and content needed to engage your audience.

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## ✓ Qualify Metrics

*Unpacking your goals into action requires math.*

Implementing a “bottoms up” approach, you need to quantify the average deal size, the number of leads that convert to proposals, and the close rate on these opportunities. For example, if the goal is \$500,000 in new sales with the average deal of \$50,000, you need 10 deals. If your leads-to-proposals rate is 25 percent and close rate is 50 percent, your marketing campaigns need to generate 80 leads that nets down to 20 opportunities and 10 deals.

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## ✓ Create Personas & Lists

*Fish where the fish are.*

As part of the marketing process, knowing thy customer, or more importantly the prospective target, is critical. Creating personas will identify who the target is, their needs, how they can be reached, the best channels to connect with them, and the types of content to engage them, etc.

Another vital but often overlooked activity is the quality of your database. Most organizations go to great lengths to generate leads but don't manage them effectively. Building and maintaining lists will ensure the right people are targeted, ensuring a better response rate and return on investment. Contacts in your CRM or marketing automation tools must be tagged or categorized by customer, prospect, partner, etc. You might have different types of customers that can be stratified as platinum, gold or silver. The key is to have an accurate account of your lists as well as the governance to continuously update them.

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## ✓ Get Started

*Just do it.*

Marketing can be overwhelming. Knowing where to start, what to focus on, and the types of content to create can be daunting. Once the goals and objectives are locked down, the key is to start small. Implement a campaign, perhaps a webinar or white paper. Maintain the discipline and develop a rhythm, then build on the momentum and expand the scope, perhaps replicating the campaign adding other elements to it. The hardest part is getting started, but this is easier when you know your goals, metrics and personas.

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## ✓ Stay Focused & Fine-Tune

*Doing the same thing over and over and expecting a different result.*

Einstein's prescient words on insanity also apply to marketing. As you implement your marketing strategy or campaign, staying disciplined is paramount. While results may vary, developing a timeline and editorial calendar will ensure a steady flow of ideas and content. That said, there are always opportunities to adjust and make tweaks when necessary. This could be via A/B tests, changing subject lines on an email blast, or developing different call to actions. You can also consider expand an existing campaign by targeting a different audience.

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## ✓ Content Experience

*Earning trust through marketing requires a commitment to education.*

Content such as white papers, use cases, how-to articles, video, blog posts, etc. provide cost-effective tools and channels to reinforce your organization's thought-leadership and build relationships (and an audience). A steady flow of content will help feed the top of the funnel and pipeline. It all starts with developing a production schedule, setting deadlines and keeping content owners accountable.

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## ✓ Tools of the Trade

*CRM, marketing automation or both.*

CRM and marketing automation tools can significantly improve the impact of your marketing activities. These systems help facilitate the delivery of targeted content experiences to varied audiences (personas and lists). There are many tools available, ranging from simple to sophisticated. Find the one that fits your needs and budget. Many organizations struggle to make CRM and marketing automation tools work because without training, they can be complex and ultimately perpetuate campaign and list chaos. The key is training and implementing controls so sales and marketing personnel can apply maintain database governance.

## ✓ Track Everything

*You cannot measure anything without data.*

Today there are so many tools to measure marketing impact, from Google Analytics to the dashboard and reports built-in to CRM and marketing automation tools. The holy grail of marketing is understanding the true impact on the business, especially related to business development and sales.

Performance metrics provide numbers in context. They need to be tracked and analyzed on an ongoing basis. Utilizing them can provide visibility into your business and how results can be tied to your strategic goals.

**Have a question or need help connecting the dots with your Marketing I/O?**

*Give us a call.*

732-863-1900

domenick.cilea@springboardpr.com

springboardpr.com