STEP 3: GENERATE LEADS WITH MARKETING TOOLKIT

NAME: DATE:

Marketing Activation Checklist.

Ready to start marketing, great! Use this checklist to ensure you have what you need for success.

Marketing Plan

- ☐ We have a formal marketing plan
- ☐ The plan has been communicated and has buy-in
- ☐ Our plan supports our business vision and goals

Strategy

- ☐ It is realistic to reach our marketing and/or business goals with this strategy
- ☐ Our strategy is aligned to our target audiences' preferences and behavior
- ☐ We have (or have found) the strengths, resources, and capabilities to do this well

Tactics

- ☐ Every tactic has an owner
- ☐ Our tactics are aligned to our audiences' preferences and behaviors
- ☐ We have (or have found) the strengths, resources, and capabilities to do this well

Collateral

- ☐ We have the capabilities to build the collateral (copy and design assets) needed or have found a partner to help
- ☐ All collateral includes a clear and compelling call to action (CTA)
- ☐ The content is focused on our audiences needs

Promotion

- ☐ We have identified the right channels to reach our target audience
- ☐ We have a content calendar or plan to deliver content consistently
- ☐ Our content is high-quality and engaging to our target audience

Execution

- ☐ We have broken our goals into smaller tasks, we know what we need to do this week, month, and quarter
- ☐ Every strategy and tactic has an owner
- ☐ We have the time, resources, capabilities, and commitment to execute the plan or have found a partner to help

Metrics

- ☐ We have identified key performance indicators (KPIs) for each strategy
- ☐ We have the data and ability to report on these KPIs
- ☐ We review (or will review) these at least quarterly and adjust as needed
- ☐ We know when to stop or pivot

Need help?

- Find a marketing partner
- Use the Goals to Outcomes tool as a project planning template
- Ask your SEI business development representative, they can direct you to the right resources

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