

Organize Milestones and Action Steps

Company

URL

Marketing Website - Organize

Milestones	Action Steps
Have you added conversational elements such as live chat?	Explore multiple contact options such as Click to Call, Interactive forms, and live chat (Facebook or 3rd party)
Have you begun tracking conversion rate optimization?	Revisit Goal set-up in Analytics Assign \$ value to goals based on sales conversion rates and customer life-time value
Have you segmented content by ideal customer group?	Ensure that most profitable customer segments are represented on home page Develop plans to create at least 1 hub page for each segment or service

Content Program - Organize

Milestones	Action Steps
Have you added a podcast or webinar series?	Create a monthly series of training or education or Add a podcast focused on ideal customer profile
Have you produced content specifically for sales and service?	Work with sales team to create core presentation deck Work with sales team to create onboarding and orientation content
Have you developed content and campaigns to upsell?	Develop plan, campaign, or funnel to cross sell current customers
Have you considered viral loop content to create leads?	Review all content forms for additional CTAs Review all email content for shareability CTAs



Search Engine Optimization - Organize

Milestones	Action Steps
Have you begun to seek guest blog posts or contributed content opportunities?	Create a list of publications that would be a good fit for your target markets Reach out to all strategic partners to explore possible content and link trades
Have you analyzed opportunities to rework or internally link old blog posts?	Audit all existing website content looking for logical ways to link blog posts to each other (Yoast plugin can suggest)
Have you explored podcasts to pitch yourself as a guest?	Create a one page podcast pitch sheet that highlights your expertise Create a list of potential shows in your industry Consider a podcast guesting service such as PodcastBookers
Have you analyzed organic CTR for ranked SERPs?	Revisit your Google Search Console set-up to understand ranking and click through reports
Have you explored featured snippets and voice search?	

Social Media - Organize

Milestones	Action Steps
Have you begun to use video to engage in social media?	Create a plan to produce 10 short videos to publish to YouTube
Have you developed a list of influencers in your industry for outreach?	Create a list of influencers
	Develop plan to reach out and engage or interview each
Have you developed ongoing social media sales campaigns?	Develop calendar of paid social media campaigns for 3 specific sales efforts
Have you embraced stories in social media?	Choose one platform to develop plan to produce weekly story video

Email Marketing - Organize

Milestones	Action Steps
Do you have a lead nurturing series of emails for networking?	Create one series of emails to use with any networking contact
Do you have a plan to acquire reviews with every project?	Review all contact points to establish opportunities to seek reviews Explore industry specific review site and choose best fit for new profile



Paid Search – Organize

Milestones	Action Steps
Have you begun to drive traffic with PPC Ads?	Create 2 product specific Google Ads Campaigns
Have you built landing pages for every ad?	Review all Ad CTAs and create or update landing page for each Build A/B test landing pages for one campaign

Sales Enablement – Organize

Milestones	Action Steps
Do you have a way to nurture leads that do not convert immediately?	Create nurture sales follow-up email series
Have you explored public speaking as a sales driver for sales person?	Create potential speaking opportunities for sales team Build core feature presentation
Have you created repeat and lapsed buyer campaigns?	Build process to identify potential lapsed buyers Launch campaign on quarterly basis

Customer Experience – Organize

Milestones	Action Steps
Do you have a referral champion program?	Identify current referral sources Create first outreach and mobilization campaign
Have you added customer events as part of your marketing?	Plan 2 events to bring your best customers together
Have you considered a customer advisory board?	Identify 10 ideal customers for board Create plan to activate and communicate



CRM - Organize

Milestones	Action Steps
Do you have a process to track and score leads?	Study your CRM's scoring capability and build process to track and score sales ready leads
Is your sales team using CRM for pipeline management?	Build pipeline stages and triggers for each sales person Create process to move through stages

Marketing Automation - Organize

Milestones	Action Steps
Have you built customer engagement campaigns in a marketing automation tool?	Review your email follow-up to existing customers looking for opportunities to ask for more engagement

Analytics - Organize

Milestones	Action Steps
Are you using UTM links for all of your marketing?	Create plan to build UTM codes with spreadsheet for all internal links
Have you initiated call tracking?	Add Call Tracking tools such as Call Rail Build Call Tracking goals in Google Analytics
Are you routinely A/B testing your marketing?	Create A/B experiments into 2 add campaigns

