MARKETING SOLUTIONS

# Level-Up Milestones and Action Steps

Company

URL

## Marketing Website – Level-Up 🖥️

| Milestones | Action Steps |
|---|---|
| Are at least 2 ideal client segments identified by type or name on the homepage? | Based on persona strategy work find a way to best represent your top 2–3 segments, industries, or actual customers. |
| Is the web site https secure? | Evaluate hosting or secure SSL certificate |
| Does the web site score at least a 50 on mobile and 80 on the desktop in Google Page Insights or Lighthouse? | Focus on fixing the highest priority recommendations via new hosting, CDN, Plugin such as WPRocket or all of the above. |

## Content Program – Level-Up

| Milestones | Action Steps |
|---|---|
| Has at least one core topic hub page been added? | Conduct keyword research to develop 2–3 hub page themes<br><br>Outline one core topic and subtopics<br><br>Audit existing content for fit<br><br>Develop plan to create and integrate remaining content |
| Are there at least 2 lead capture opportunities? | Add a simple CTA for a content upgrade such as an eBook<br><br>Add a simple CTA to schedule a call, quote, or evaluation type appointment |

# Search Engine Optimization – Level-Up 🔲SEO

| Milestones | Action Steps |
|---|---|
| Have at least 2 SEO content ranking opportunities been identified in Google Search Console? | Claim and set-up Google Search Console<br><br>Find any top 20 search queries with high intent and create plan to optimize content for 2 queries |
| Has a list of at least 10 backlink opportunities been created? | Create list of low hanging opportunities such as partners, vendors, suppliers, association directories, sponsorship, and media mentions.<br><br>Research competitor backlinks to identify 5-10 potential industry or community related links to acquire<br><br>Make plan to reach out to both lists |
| Has a list of at least 5 existing content pieces been identified for updates? | Find older content that has business intent and run checklist to update and enhance the content (this can be ongoing monthly) |

# Social Media – Level-Up 👍

| Milestones | Action Steps |
|---|---|
| Has at least one video been posted to engage in social media? | Create a bank of 5-10 short tips of FAQ types of videos to rotate in social media posts |
| Has a media list for industry or community with at least 10 publications been developed? | Conduct research and develop list of at least 10 publication or influencers in your industry and/or community. |

# Email Marketing – Level-Up ✉️

| Milestones | Action Steps |
|---|---|
| Are there at least 2 lead capture devices on the website? | See content above – focus on specific CTA for content using a content upgrade and segmented lists by topic. |
| Is there a follow-up funnel with at least 3 lead nurturing emails created for at least one lead capture opportunity? | Create a welcome series of emails for any new subscriber or email captured to showcase best, most useful and value laden content. |

# Paid Search - Level-Up 🔍

| Milestones | Action Steps |
|---|---|
| Is there a branded PPC campaign and Ads? | Create or access Google Advertising account and create low-cost keyword campaign for searches for your company name including common misspellings of the name. (Direct to home or contact page) |
| Has at least one landing page been built for any ads running? | Build one landing page for an important product or service offering<br><br>Create content upgrade or offer and CTA<br><br>Create and test very specific keyword campaign |
| Are ad tracking pixels from social sites installed? | Create or access Facebook business manager account<br><br>Place account pixel on website<br><br>Define and start building site visit audience. |
| Are you using paid social to build at least one funnel? | Create one FB campaign targeting either your landing page referenced above or hub page reference in content section |

# Sales Enablement - Level-Up 🪙

| Milestones | Action Steps |
|---|---|
| Is there a core sales presentation deck that all salespeople use? | Develop core deck and library of potential variations for products, segments or services. |
| Is there at least one funnel built to nurture leads that do not convert immediately? | Create sales follow-up funnel that provides additional information related to proposals, products or offers. |

# Customer Experience - Level-Up 🎯

| Milestones | Action Steps |
|---|---|
| Is there at least one way to actively ask for referrals? | Develop one process you can operate on at least a quarterly basis |
| Do you have a process to surprise/delight new customers? | Develop a process to provide something to each new customer that they were not promised or not expecting |
| Do you have a way to gather feedback to improve? | Develop a process to ask every customer for a review |

# CRM - Level-Up

| Milestones | Action Steps |
|---|---|
| Is a CRM Tool installed? | Research how customer information is stored today<br><br>Research various CRM, email, and marketing automation tools |

# Marketing Automation - Level-Up

| Milestones | Action Steps |
|---|---|
| Is there at least one autoresponder series to automate some aspect of follow-up | Audit existing email service tools<br><br>Create plan to enhance follow-up as part of email and funnel activity |

# Analytics - Level-Up

| Milestones | Action Steps |
|---|---|
| Is advertising tracking integrated with Google Analytics? | Integrate all advertising platforms with Google Analytics<br><br>Start using UTM codes with all URLs used for advertising |
| Have you created goals for all lead capture? | Develop thank you or confimation pages for all lead capture<br><br>Create Google Analytics conversion goals ties to thank you pages<br><br>Establish a monetary target for all goal conversions using Cost per online conversion, sales conversion, and lifetime customer value equation |