

Foundation Milestones and Action Steps

Company

URL

Marketing Website - Foundation Stage

Milestones	Action Steps
Does your branding match your domain?	Set-up domain-based email address Check for an accurate representation of brand elements
Is the website built on a content management tool like WordPress?	Consider moving to a CMS
Has the site been significantly updated in the last 12 months?	Review site for needed update and restructure
Does the homepage make a promise to solve a major problem your ideal client has?	Considering adding a problem-solving message developed during the strategy phase
Is the site mobile-friendly?	Note site appearance on mobile devices and plan to update if needed
Does the homepage exhibit trust elements such as client logos or testimonials?	Consider adding testimonials, case studies, client logos, media appearances, certifications, or award logos to help add trust to the home page.
Is the current hosting professional and able to handle growth?	Verify professional hosting service and suggest improvement if appropriate

Content Program - Foundation Stage

Milestones	Action Steps
Does the website tell a story about your brand?	Create core message story about us page or video
Are there core pages for products, services, locations, and people?	Audit core pages to make sure products, services, locations, and people pages exist Map out a plan to fill any gaps in core pages
Does the website use video to help tell a story and build trust?	Create at least 1 video for the homepage that helps tell the company story



Search Engine Optimization – Foundation Stage

Milestones	Action Steps
Is Google My Business listing claimed?	Claim it and make sure there are no duplicates
Is Google My Business listing optimized?	Check category, NAP, Description, Photos
Do the business name, address and phone appear on the website and match the GMB listing?	Make them match exactly
Are directory listings in other data directories such as YP.com and Yelp accurate and up to date?	Run an audit to fix obvious inaccuracies
Have meta titles and descriptions on all pages been intentionally edited for SEO purposes?	If WordPress install the Yoast WP plugin Check for keyword-rich titles and description on all core pages

Social Media – Foundation Stage

Milestones	Action Steps
Have Facebook, Twitter, Instagram, and LinkedIn profiles been claimed and branded?	Claim or create missing profiles Update header and profile images if needed. Add description and link to and from profiles
Are content or campaigns being promoted on any social network?	Create a plan for weekly content promotion
Is content that is not promotional in nature being promoted? (culture)	Create a process for sharing posts that help show behind the scenes

Email Marketing – Foundation Stage

Milestones	Action Steps
Is a client and prospect email list maintained and up to date?	Determine how to clean and access
Are routine emails sent to stay top of mind? (Monthly)	Create a newsletter or information email
Are any campaigns in place to re-engage dormant customers?	Determine the best way to send email communications to past customers



Paid Search – Foundation Stage

Milestones	Action Steps
Are Facebook posts or promotions being boosted?	Note this for future
Are you running any paid social media ads?	Note for future
Do you have a Google Ads account?	Create for future use

Sales Enablement – Foundation Stage

Milestones	Action Steps
Is there any form of strategic partner network?	Start the process of brainstorming potential partners
Is there a lead mining process?	Determine at least one source of potential leads such as LinkedIn

Customer Experience – Foundation Stage

Milestones	Action Steps
Is there a process to onboard new customers?	Start to map out a new customer process
Is there an ongoing process for collecting reviews?	Create and implement a review funnel

CRM – Foundation Stage

Milestones	Action Steps
Is there any form of customer activity tracking?	Note for future optimization



Analytics - Foundation Stage

Milestones	Action Steps
Is Google Analytics tracking code installed on the website?	Install tracking code
Is Google Search Console claimed?	Set-up or claim Submit sitemap Look for any Google warnings
Are there any conversion goals in Google Analytics?	Note existing goals Note obvious gaps that could be tracked

