

THE ULTIMATE MARKETING CHECKLIST

149 Steps to Achieve Marketing Perfection What's Your Score?

KEY:

NO Missing or Failing

OK But Needs Work

YES Looking Good!

Using the table below and overleaf, tick the column that best represents where your company is at right now...

A. YOUR BUSINESS STRATEGY The Bedrock of Your Brand	NO	OK	YES
1. Your company has a written 5-year vision			
2. Your company has a mission statement			
3. 100% of your staff can quote your mission			
4. Your company has defined its purpose (why)			
5. Your company has defined its company values			
6. Your values are displayed (internally & externally)			
7. Your company has a current swot analysis			
8. Your primary target market is well-documented			
9. Your secondary target market(s) are defined			
10. Your target market problems/wants are mapped			

B. YOUR BRAND IDENTITY Are You Looking Your Best?	NO	OK	YES
11. Your company logo is clear and modern			
12. Your company name & logo are trademarked			
13. Your company has access to a master set of logos			
14. Your company has an effective tagline			
15. Your company knows its brand personality			
16. Your company fonts reflect your brand personality			
17. Your company colours reflect your brand personality			
18. Your brand fonts are the same on all collaterals			

B. YOUR BRAND IDENTITY Are You Looking Your Best?	NO	OK	YES
19. Your brand colours are the same on all collaterals			
20. Your company has a "brand style guide"			
21. Your brand uses consistent visual elements			
22. Your brand imagery looks authentic (non stock)			
23. Your physical location is well branded			
24. All company motor vehicles are well branded			
25. All social icons & social covers are consistent			
26. Printed banners exist for events & trade-shows			
27. All customer facing staff wear uniforms			
28. Company has a compelling origin story			

C. COMMUNICATIONS Are You Proactive?	NO	OK	YES
29. Your company uses a modern crm tool			
30. Your crm is configured for the business			
31. All phone calls are answered without fail			
32. All inquiry emails get an instant reply			
33. All inquiry emails are given call backs asap (if required)			
34. Your crm contains several pre-built follow-ups			
35. Your company website has an faq/support page			
36. Marketing emails are sent every 2 weeks			
37. You plan content emails 3 months in advance			
38. Warm leads are called every 2 weeks			
39. You have simple collaterals (e.G. Brochures)			
40. You have detailed collaterals (e.G. Magalog)			
41. You send clients a note/gift on birthdays			
42. You send clients a note/gift for christmas			

D. YOUR WEBSITE Your Business' Epicentre	NO	OK	YES
43. Your website loads under 3 seconds			
44. Your welcome panel says what you do			
45. Your welcome panel explains the user benefits			
46. Your welcome panel says why you're unique			
47. Your welcome panel has an emotion-generating hero image			
48. There is a clear call-to-action above the fold			
49. Your welcome panel looks great on mobiles			
50. Your home page has been optimised for seo			
51. Your home page expands on user benefits			
52. Your home page shows products/services			
53. Your home page has dynamic content (e.G. Blog)			
54. Your home page shows your credibility			
55. Your home page offers a strong lead magnet			
56. Your lead magnet is linked to a crm			
57. Your navigation has no more than 5 options			
58. Your 'about us' page is focused on the user, not you			
59. You have great copy on products/services pages			
60. You have high-quality photos on all products pages			
61. Your products pages are all optimised for seo			
62. A call-to-action is present on every page			
63. Your website has a dedicated landing page			
64. Your website contains at least 5 videos			
65. Your website has 10 quality testimonials			
66. Your website has a blog that's frequently updated			
67. Your website has a hotjar code installed			
68. Your facebook pixel is installed & working			
69. Your google pixels are installed & working			

E. USING FACEBOOK The Worlds #1 Website	NO	OK	YES
70. The company owner(s) have personal facebook pages			
71. Your company has a business facebook page			
72. You support enquiries via facebook messenger			
73. Your facebook page contains 20+ 5-star reviews			
74. The company posts 2-3 times per week			
75. Your posts contain useful content or stories			
76. Your posts contain high-quality images/videos			
77. Your company boosts all high performing posts			
78. Your company generates new leads via facebook ads			
79. Your facebook account has remarketing ads running			
80. Someone in the company is measuring results on ads			
81. Your company is split testing ads copy & images			
82. The same standards are achieved on instagram			

F. USING GOOGLE The Worlds Biggest Search Engine	NO	OK	YES
83. Your business name ranks position 1 on google			
84. You know the top 10 keywords in your industry			
85. You rank on page 1 for your 10 keywords			
86. Your company has a 'google my business' page			
87. Your 'google my business' page contains great photos			
88. Your 'google my business' page has 20 5-star reviews			
89. You look at google analytics every week			
90. You use google goals to measure conversion			
91. You use google experiments to split-test pages			
92. You use google tag manager on website			
93. You have google remarketing ads running			
94. Your remarketing banner ads are effective			
95. You have google search ads running			

G. OTHER SOCIAL MEDIA Where Are Your Prospects?	NO	OK	YES
96. The company owner(s) have personal linkedin pages			
97. Your key staff have professional linkedin pages			
98. Your company has an updated linkedin page			
99. Your company posts on feed (1/week)			
100. Your company has a dedicated youtube channel			
101. Your youtube channel has been optimised for seo			
102. You have at least 5 videos on your youtube channel			
103. Each youtube video has been optimised for seo			
104. Your company produces regular podcasts			

H. ADDITIONAL MARKETING Additional Channels	NO	OK	YES
105. 10 companies send you regular referrals			
106. You attend 1 networking event per month			
107. You exhibit at 2 trade shows/expos per year			
108. You send a story idea to media every month			
109 you are featured in the media every quarter			
110. You write articles for relevant blogs/magazines			
111. You send direct mail to qualified leads			
112. You've submitted your business for awards			
113. Your business has won 3 or more awards			
114. You run live events for prospects or leads			
11.5 you have tested sponsoring an award/event			
116. You have tested print ads in your local area			

I. YOUR SALES PROCESSES Time to Seal the Deal	NO	OK	YES
117. Your company has a set sales process			
118. You utilise visual aids when selling			
119. You limit options to make it easy to buy			
120. You have a professional sign-up process			
121. You have a terms of service agreement			
122. You give a surprise gift after they buy			
123. You have a system for educating new clients			
124. You follow-up after a service interaction			
125. You have a process to ask for testimonials			
126. You have a process to ask for referrals			
127. You send a note/gift after getting referrals			

J. TESTING & MEASURING Know What's Working	NO	OK	YES
128. You measure the number of leads gained every week			
129. You know your desired cost per lead			
130. You know your actual cost per lead			
131. You ask every lead 'how did you find us'			
132. You measure the number of every lead source			
133. You know the average cost per lead, per source			
134. You measure the number of sales every week			
135. You know your current conversion rate			
136. You measure your average dollar sale			
137. You generate a weekly marketing report			
138. You have a live marketing dashboard			
139. You plan your marketing goals (quarterly)			

K. YOUR MARKETING TEAM Who's Making It Happen?	NO	OK	YES
140. Your company has an external brand strategist			
141. Your company has an external marketing advisor			
142. Your company has a full-time marketing manager			
143. Your company has an on-demand graphic designer			
144. Your company has an on-demand web developer			
145. Your company has an on-demand copywriter			
146. Your company has an on-demand crm expert			
147. Your company has a social media co-ordinator			
148. Your company has a video creation expert			
149. Your company has a dedicated sales person/team			

TOTALS:

#of
NOs

#of
OKs

#of
YES'

/149

x 100 =

FINAL
SCORE

%

YOUR SCORE

0-50% - Uh Oh! Either your business is very new or you've missed opportunities everywhere and it's costing you big time. **We can help!**

50-75% - Well done! You're doing better than most but there's still plenty of room to improve and increase your revenue. **Get in touch!**

75-100% - Congratulations! You're doing well and now you know what else you need to do to achieve marketing perfection. **High five!**

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