

# 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 a 5 Year Vision          |  |  |  |
| 2 Your Company Has a Mission Statement                |  |  |  |
| 3 100% of Staff Can Quote Your Mission                |  |  |  |
| 4 Your Company Has Defined its 12-Month Goals         |  |  |  |
| 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) Also 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, Effective and Modern    |  |  |  |
| 12 Your Company Name & Logo Are Trademarked            |  |  |  |
| 13 Your Company Has Access to a Master Set of Logos    |  |  |  |
| 14 Your Company Has a Positing Statement (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 Collateral     |  |  |  |
| 19 Your Brand Colours Are The Same on All Collateral   |  |  |  |
| 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 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 an Origin Story (See Hero's Journey)    |  |  |  |

## 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 Replied to within 4 Hours |  |  |  |
| 34 Your CRM Contains a Pre-Built Follow Up Campaign |  |  |  |
| 35 Your Company Website Has a FAQ/Support Page      |  |  |  |
| 36 Marketing Emails Are Sent Every 2 Weeks          |  |  |  |
| 37 You Plan Email Content 3 Months in Advance       |  |  |  |
| 38 Warm Leads Are Called Every 2 Weeks              |  |  |  |
| 39 You Have Simple Collateral (E.g. Brochures)      |  |  |  |
| 40 You Have Detailed Collateral (E.g. Magalog)      |  |  |  |
| 41 You Send Clients a Note/Gift on Birthday         |  |  |  |
| 42 You Send Clients a Note/Gift for Christmas       |  |  |  |

## D. YOUR WEBSITE

Your Businesses Epicentre

NO    OK    YES

- |   |  |  |  |
|---|--|--|--|
| 43 Your Website Loads Under 3 Seconds                 |  |  |  |
| 44 Your Welcome Panel Says What You Do                |  |  |  |
| 45 Your Welcome Panel Explains User Benefits          |  |  |  |
| 46 Your Welcome Panel Says Why You're Unique          |  |  |  |
| 47 Your Welcome Panel Contains a Powerful 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 Proof and Credibility         |  |  |  |
| 55 Your Home Page Offers a Strong Lead Magnet         |  |  |  |
| 56 Your Lead Magnet is Linked to Your 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 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 is Posting 2-3 Times Per Week			
75	Your Posts Contain Useful Content or Stories			
76	Your Posts Contain High-Quality Images/Videos			
77	Your Company Boost All High Performing Posts			
78	Your Facebook Account Has Remarketing Ads Running			
79	Your Company Generates New Leads Via Facebook Ads			
80	Someone in The Company is Measuring Results on Ads			
81	Your Company is Split Testing Ads Copy & Images			
82	The Same Standards Are Being 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 Optimize to Split-Test Pages			
92	You Use Google Tag Manager on Website			
93	You Have Google Remarketing Display Ads Running			
94	You Have Google Search Ads Running			
95	Your Display & Search Ads Are Converting			

The Ultimate Marketing Checklist™ was created by award-winning entrepreneur and 19 times best-selling author Dale Beaumont. Its goal is to demystify the process of achieving marketing success. Once you complete this document, we can help you close the gaps in your business. To find out how, we suggest you attend our breakthrough business training called "52 Ways". In just 3 hours, from the comfort of your home or office, we'll teach you how to achieve success in every aspect of your business. To learn more and claim your free tickets, visit: <https://52ways.com>

## G. OTHER SOCIAL MEDIA

### Where Are Your Prospects?

NO    OK    YES

<b>96</b>	The Company Owner(s) Have Personal LinkedIn Pages			
<b>97</b>	Your Key Staff Have Professional LinkedIn Pages			
<b>98</b>	Your Company Has an Updated LinkedIn Page			
<b>99</b>	Your Company Posts on Feed (1/week)			
<b>100</b>	Your Company Has a Dedicated YouTube Channel			
<b>101</b>	Your YouTube Channel Has Been Optimised for SEO			
<b>102</b>	You Have at Least 5 Videos on Your YouTube Channel			
<b>103</b>	Each YouTube Video Has Been Optimised for SEO			
<b>104</b>	Your Company Has a Regular Podcast			

## H. ADDITIONAL MARKETING

### Additional Channels

NO    OK    YES

<b>105</b>	10 Companies Send You Regular Referrals			
<b>106</b>	You Attend 1 Networking Event Per Month			
<b>107</b>	You Exhibit at 2 Trade Shows/Expos Per Year			
<b>108</b>	You Send a Story Idea to Media Every Month			
<b>109</b>	You Are Featured in the Media Every Quarter			
<b>110</b>	You Write Articles for Relevant Blogs/Mags			
<b>111</b>	You Send Direct Mail to Qualified Leads			
<b>112</b>	You've Submitted Your Business to Awards			
<b>113</b>	Your Business As Won 3 or More Awards			
<b>114</b>	You Run Leveraged Sales Events for Prospects/Leads			
<b>115</b>	You Have Tested Sponsoring a Event, Award, etc			
<b>116</b>	You Have Tested Print Ads in Your Local Area			

## I. YOUR SALES PROCESSES

### Time to Seal the Deal

NO    OK    YES

<b>117</b>	Your Company Has a Set Sales Process			
<b>118</b>	You Utilise Visual Aids When Selling			
<b>119</b>	You Limit Options to Make It Easy to Buy			
<b>120</b>	You Have a Professional Sign Up Process			
<b>121</b>	You Have a Terms of Service Agreement			
<b>122</b>	You Give a Surprise Gift After They Buy			
<b>123</b>	You Have a System for Educating New Clients			
<b>124</b>	You Follow Up After a Service Interaction			
<b>125</b>	You Have a Process to Ask for Testimonials			
<b>126</b>	You Have a Process to Ask for Referrals			
<b>127</b>	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 Lead Numbers by Various Lead Source   |  |  |  |
| 133 You Know 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 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 a Social Media Co-ordinator   |  |  |  |
| 147 Your Company Has an On-Demand CRM Expert       |  |  |  |
| 148 Your Company Has Video Creation Expert         |  |  |  |
| 149 Your Company Has Dedicated Sales Person/Team   |  |  |  |

## TOTALS:

# of NOs		# of OKs		# of YES'	/ 149	x 100 =	FINAL SCORE	%
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Divide your score by 149, then times it by 100 and that is your percentage.

**YOUR SCORE**

**0-50%** - Uh Oh, either your business is very new or you've got missed opportunities everywhere and it's costing you big. [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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