Marketing Automation Checklist 2025

Free Edition — high-level steps only (no templates, prompts or paid assets included)

Who this is for: solo creators, freelancers and tiny teams who want a clear, non-technical checklist to stand up basic capture, email automation, funnels and tracking in 1–2 days.

What's inside: a minimal, step-by-step plan you can execute today. If you want ready-made prompts, email sequences and swipe files, those live in the paid AutomateX Turbo toolkit.

IMPORTANT	This Free Edition is intentionally <u>high-level</u>. It excludes any paid content: no prompts, no email copy, no templates or swipe files. You get only the structure to implement with your own words and tools.

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1) Foundations

- Define the single audience you will serve first (e.g., solo creator in X niche).
- Write the core outcome in one sentence (e.g., 'Publish 3 revenue-driving assets per week').
- Pick one offer to promote (e.g., a low-friction toolkit).
- Decide one distribution channel to start (e.g., LinkedIn or X).
- Prepare a simple brand system: consistent title format, color, and call-to-action.

2) Capture (Lead Magnet)

Goal: exchange value for an email. Keep it light and fast to produce.

- Create a 1–3 page lead magnet (e.g., checklist PDF). No heavy design needed.
- Build a simple capture page (headline + 3 bullets + form + privacy note).
- Send successful opt-ins to a thank-you page with clear next steps (no upsell required).
- Tag new contacts as 'LM-2025-Checklist' (or equivalent).
- Store consent and respect local regulations (GDPR/CCPA best practices).

3) Email Automation (No-spam setup)

- Warm up your sender domain or use a reputable provider.
- Authenticate: SPF, DKIM, DMARC (use provider docs).
- Set a basic welcome automation: deliver the lead magnet immediately.
- Schedule 3 short educational emails (value first; no templates provided here).
- Use plain-text-like layout, clear unsubscribe, and test rendering on mobile.

4) Funnel Pages (Landing + Thank-you)

- Landing Page: specific headline (include year) + benefit + 3 bullets + 1 CTA.
- Add social proof placeholders (logos, results) if you have them — keep optional.
- Thank-you Page: confirm the download + show 'what to do next' (1–3 bullets).
- Include a secondary CTA to discover your main offer, but keep it optional.
- Make both pages mobile-first and fast (LCP < 2.5s).

5) Analytics & Tracking

- Install analytics (e.g., GA4) on all pages.
- Use UTM parameters consistently: source, medium, campaign, content.
- Track conversions: form submit, email verification, pageview on thank-you.
- Check deliverability metrics (open/click/complaints) inside your ESP.
- Review data weekly; kill underperformers and double down on winners.

6) Content Engine (Weekly cadence)

- Publish one long-form piece targeting a clear keyword per week.
- Derive 3–5 short posts from that piece (platform-native).
- Interlink assets and point back to your capture page with consistent anchors.
- Maintain an editorial calendar: topic, keyword, URL, status, UTM.
- Review weekly performance and update headlines/descriptions for CTR.

7) QA & Launch

- Pre-flight checks: links, forms, emails, mobile view, speed.
- Privacy/regulatory checks: consent, unsubscribe, data policy.
- Test an end-to-end run (incognito): capture → email → thank-you.
- Ship it. Avoid perfectionism; iterate with data.
- Create a simple rollback note (what to revert if something breaks).

8) 72-Hour Quickstart (condensed)

- Day 1: Draft a 1–3 page checklist and build a capture page (headline + bullets + form).
- Day 2: Configure the welcome automation + 2 educational emails. Add tracking and UTMs.
- Day 3: Publish 1 long-form post + 3 shorts. Link back to the capture page with exact-match anchors.

Appendix — What's NOT included in the Free Edition

- No prompts (copywriting, email, social, SEO).
- No email templates or sequences.
- No swipe files or page templates.
- No UTM spreadsheets or advanced automation blueprints.
- Those live in the paid AutomateX Turbo toolkit.

Want the ready-to-use assets (prompts, emails, swipes)? See the full toolkit: https://automatexai.gumroad.com/l/automatex-turbo