MARKETING STACK CHECKLIST

Assess Your Business Needs

- [ ] **Define Marketing Goals**: Are you focusing on lead generation, brand awareness, customer retention, or something else?
- [ ] **Identify Your Target Audience:** Understand your buyer personas, customer journey, and behavior to select the right tools.
- [ ] **Map Your Marketing Channels:** List the key platforms where your audience is active (social media, email, search engines, etc.).

Build Your Marketing Stack Foundation

- [ ] **CRM (Customer Relationship Management):** Choose a CRM system to manage customer data and track interactions (e.g., Salesforce, HubSpot, Zoho)
- [ ] **CMS (Content Management System):** Select a CMS for managing website and blog content (e.g., WordPress, Wix).
- [ ] **Email Marketing Platform:** Implement an email tool for newsletters, automated emails, and campaigns (e.g., Mailchimp, Constant Contact).
- [ ] **Social Media Management Tool:** Pick a tool for scheduling and analyzing social media posts (e.g., Hootsuite, Buffer).
- [ ] **Analytics Platform:** Ensure you have an analytics tool to track website performance and campaign effectiveness (e.g., Google Analytics, HubSpot Analytics).

linktr.ee/patmcgraw

MARKETING STACK CHECKLIST

Choose Supporting Tools

- [ ] **SEO Tools:** Implement software to optimize content for search engines (e.g., SEMrush, Moz, Ahrefs).
- [ ] **PPC Tools:** Set up platforms for managing paid ads, including Google Ads, Bing Ads, or social media ad platforms.
- [ ] **Marketing Automation:** Use automation tools to streamline repetitive tasks like email marketing and lead nurturing (e.g., Marketo, ActiveCampaign).

Integration and Data Management

- [ ] **Ensure Tools Integrate Seamlessly:** Use platforms that can communicate with each other (CRM with email, social media with analytics, etc.). Consider using APIs or middleware like Zapier if tools don't integrate natively.
- [ ] **Implement a CDP (Customer Data Platform):** Consolidate customer data from multiple channels for unified tracking and better personalization (e.g., Segment, Treasure Data).
- [ ] **DMP (Data Management Platform):** If necessary, consider a DMP for programmatic advertising and audience segmentation (e.g., Adobe Audience Manager).

linktr.ee/patmcgraw

MARKETING STACK CHECKLIST

Implement Lead Tracking and Scoring

- [ ] **Set Up Lead Tracking:** Ensure you can monitor and attribute leads across various channels (social, email, PPC, etc.).
- [ ] **Lead Scoring:** Implement a lead scoring model to prioritize and segment leads based on their behavior and engagement.

Optimize Conversion Points

- [ ] **A/B Testing:** Regularly test landing pages, emails, and ads to optimize conversion rates (e.g., Optimizely, Google Optimize).
- [ ] **CRO (Conversion Rate Optimization) Tools:** Use tools to analyze user behavior and improve website performance (e.g., Hotjar, Crazy Egg).
- [ ] **Improve UX (User Experience):** Ensure your website is intuitive and mobile-optimized to minimize friction in the customer journey.

MARKETING STACK CHECKLIST

Track and Measure Campaign Success

- [ ] **Define KPIs (Key Performance Indicators):** Ensure you have clear KPIs such as conversion rates, cost-per-lead (CPL), or customer lifetime value (CLV).
- [ ] **Attribution Model:** Choose an attribution model to properly assign credit to the marketing channels contributing to conversions (e.g., first-touch, last-touch, multi-touch attribution).
- [ ] **Set Up Dashboards:** Create real-time reporting dashboards to monitor campaign performance across platforms.

Automate Where Possible

- [ ] **Email Marketing Automation:** Set up automated email sequences based on user behavior (e.g., welcome series, abandoned cart reminders).
- [ ] **Social Media Automation:** Schedule posts in advance and use tools that allow automatic publishing and reporting.

linktr.ee/patmcgraw

MARKETING STACK CHECKLIST

Keep the Stack Flexible and Scalable

- [ ] **Future-Proof Your Stack**: Choose platforms that offer scalability and can accommodate new tools or channels as your business grows**.**
- [ ] **Evaluate Subscription Plans:** Select tools that align with your current budget but offer flexible pricing to grow as your marketing needs evolve.

Regular Audits and Updates

- [ ] **Quarterly Tool Review**: Evaluate the performance of each tool in your stack and assess if there are better alternatives or redundant tools.
- [ ] **Update Integrations:** Regularly check if integrations between tools are functioning properly, and upgrade as needed.
- [ ] **Ensure Data Accuracy:** Conduct audits to ensure all customer and campaign data is clean, consistent, and actionable.

linktr.ee/patmcgraw

MARKETING STACK CHECKLIST

Training and Support

- [ ] **Onboard Team Members:** Ensure all team members are trained to use the tools effectively.
- [ ] **Access Support:** Use customer support resources from your software vendors to troubleshoot issues and stay informed on new features.

AEvaluate ROI (Return on Investment)

- [ ] **Track Tool Costs vs. Performance:** Regularly calculate the ROI of each tool by comparing its cost to the revenue or results it generates.
- [ ] **Adjust as Needed:** Be prepared to switch tools, renegotiate contracts, or downgrade features that aren't yielding sufficient value.

Sources:

- HubSpot. "The Ultimate Guide to Building Your Marketing Stack."
- Gartner. "Best Practices for Martech Stack Optimization."
- Salesforce. "Building a High-Performance Marketing Stack."

linktr.ee/patmcgraw