

Use this resource to benchmark your ongoing marketing activities against a best-practice checklist. A consistent and structured marketing approach helps your business stay visible, attract new customers, and nurture existing relationships.

Schedule a follow-up in three months to review progress and identify areas that still need attention. Regularly evaluating your marketing efforts allows you to refine strategies, adapt to changing market conditions, and maximize your return on investment. Small, consistent actions can lead to significant results over time.

### Marketing strategy

- Marketing plan reviewed regularly
- Offsite strategy meeting hosted once a year
- Time is scheduled for marketing each week
- Key performance metrics are tracked and reviewed monthly
- Marketing budget is set and reviewed annually

### Digital and content marketing

- Social media posts published weekly
- Thought leadership content posted monthly
- Website content updated regularly
- Search Engine Optimization (SEO) strategy reviewed and adjusted quarterly
- Paid advertising campaigns reviewed and optimized

### Customer engagement and communication

- Monthly customer newsletter sent via email
- All customers know about all of your services
- Customers are contacted about new services
- Develop a process to regularly ask customers for testimonials
- Customers identified for case studies once per quarter

### Lead generation and follow-up

- New leads are contacted within 24 hours
- Email blasts sent to prospects at least once per month
- Landing pages and lead capture forms optimized
- CRM or database updated with lead interactions
- Prospects are nurtured through targeted follow-up

### Events and networking

- Run educational customer events
- Attend networking events that target prospects
- Schedule webinars and online meetings
- Network of referral partners actively maintained
- Speaking opportunities sought at industry events

### Referral and relationship building

- Regular customer catch-up meetings scheduled
- Customers are actively asked for referrals
- Partnerships established with complementary businesses
- Exclusive offers or loyalty incentives provided to customers
- Referral program tracked and optimized



## Marketing strategy

### Marketing plan reviewed regularly

A strong marketing plan includes clear, measurable goals, such as “post three times per week on LinkedIn” or “generate 10 new leads per month.” Tracking specific outcomes provides accountability and insights into what’s working.

Regular reviews help assess performance, identify trends, and refine strategies. Set a schedule, monthly or quarterly, to analyze results and adjust tactics to align with business goals.

### Offsite strategy meeting hosted once a year

An annual offsite meeting allows your team to step back, align on company objectives, and refine marketing strategies. A fresh environment encourages creative thinking and collaboration.

These meetings also improve morale and focus by eliminating office distractions. Whether a full-day retreat or a workshop, dedicated time for strategic planning keeps marketing efforts goal-driven and adaptable.

### Time is scheduled for marketing each week

Marketing drives growth, attracts new customers, and maintains customer relationships. It needs to be a consistent priority, not an afterthought.

Even if execution is outsourced, strategy and direction should stay in-house. Set aside time each week to review campaigns, plan content, and assess performance, just like any other core business function.

### Key performance metrics are tracked and reviewed monthly

Tracking key metrics like website traffic, social media engagement, and lead conversions helps you make data-driven decisions. Without regular monitoring, it’s hard to optimize strategies.

A monthly review identifies trends, compares results to goals, and refines your approach. Dashboards or reports help visualize data, allowing you to adapt quickly and maximize ROI.

### Marketing budget is set and reviewed annually

An annual budget prioritizes spending across channels like digital ads, content, and events. Without one, marketing efforts risk being inconsistent or underfunded.

Review your budget yearly to assess performance and reallocate funds based on results. As your business evolves, adjusting your marketing spend keeps strategies cost-effective and results-driven.

## Digital and content marketing

### Social media posts published weekly

Consistent social media activity keeps your brand visible, engages your audience, and attracts new customers. Regular updates showcase expertise, share insights, and build trust.

Aim to post at least once a week on relevant platforms. Plan content in advance, balance promotional and educational posts, and use analytics to refine your approach. Staying active keeps your brand top of mind.

### Thought leadership content posted monthly

Publishing thought leadership content strengthens credibility and positions you as an industry authority. Well-researched insights keep your audience engaged while keeping your brand relevant.

Post at least once a month to maintain visibility and encourage engagement. Align topics with industry trends, optimize for search engines, and provide valuable insights to attract potential customers.

### Website content updated regularly

Fresh website content improves credibility and search rankings. Regular updates signal to visitors and search engines that your business is active and engaged.

Review content periodically to align with brand messaging and customer needs. Keeping information accurate enhances user experience, increases engagement, and supports overall marketing efforts.

### Search Engine Optimization (SEO) strategy reviewed and adjusted quarterly

SEO is an ongoing process that evolves with search algorithms and user behavior. Quarterly reviews help refine keyword strategies, improve load speed, and optimize for mobile.



Analyze organic traffic, bounce rates, and rankings to identify areas for improvement. Adjusting strategies based on data keeps your website visible and attracts qualified leads.

### **Paid advertising campaigns reviewed and optimized**

Paid ads require ongoing optimization for the best return on investment. Performance should be monitored and adjusted based on engagement, conversions, and cost-effectiveness.

Regularly review campaign analytics, test creatives, refine audience targeting, and adjust budgets. Continuous optimization improves results and helps you spend marketing dollars more effectively.

## **Customer engagement and communication**

### **Monthly customer newsletter sent via email**

A monthly newsletter keeps customers informed with industry news, service updates, and expert insights. Providing relevant content builds trust and positions you as a go-to resource.

Beyond engaging current customers, a well-crafted newsletter nurtures relationships with partners and attracts new leads. It keeps your business top of mind and encourages ongoing communication.

### **All customers know about all of your services**

Customers can't use services they don't know about. Regular communication through emails, calls, and meetings helps highlight your full range of offerings and creates upsell opportunities.

Bring up your services during customer check-ins, webinars, and events. These touchpoints reinforce your value and present solutions that address evolving needs.

### **Customers are contacted about new services**

Keeping customers informed about new services strengthens engagement and opens doors for additional business. If they only discover offerings by chance, valuable opportunities may be missed.

Use emails, calls, or in-person meetings to introduce new services in a way that feels relevant. Focus on how these solutions solve specific challenges or add value.

### **Develop a process to regularly ask customers for testimonials**

Customer testimonials provide powerful social proof but are often overlooked. A simple email request after a successful project is an effective way to gather them.

When a customer expresses appreciation, ask if you can feature their words. Keeping a structured approach helps maintain a steady stream of authentic endorsements for marketing materials.

### **Customers identified for case studies once per quarter**

Case studies showcase real-world results, making them a valuable marketing tool. Each quarter, identify customers with compelling success stories and measurable outcomes.

A well-crafted case study builds trust and reinforces expertise. Use them on your website, in sales materials, and across marketing channels to highlight your impact.

## **Lead generation and follow-up**

### **New leads are contacted within 24 hours**

Responding to leads within 24 hours increases conversion chances. Prospects exploring multiple options are more likely to choose businesses that respond promptly, while delays can lead them to competitors.

Set up a structured follow-up process via email, phone, or automated systems. Personalize outreach by addressing their specific needs and providing clear next steps, such as scheduling a call or sharing relevant resources.

### **Email blasts sent to prospects at least once per month**

Regular email campaigns keep your business top of mind and encourage action. Whether promoting offers, sharing insights, or inviting engagement, these emails subtly guide prospects toward the next step.



Different email types serve unique purposes. Welcome emails connect new subscribers, retention emails keep existing prospects engaged, and promotional emails highlight limited-time deals. Consistent outreach increases conversion potential.

### **Landing pages and lead capture forms optimized**

A well-crafted landing page makes it easy for prospects to engage. Clear headlines, compelling copy, and strong calls-to-action guide visitors toward signing up for newsletters, consultations, or special offers.

Keep forms simple to reduce friction and drive more conversions. Regularly test button placements, form lengths, and messaging while tracking conversion rates to refine performance and improve results.

### **CRM or database updated with lead interactions**

An up-to-date CRM helps track leads, personalize follow-ups, and prevent lost opportunities. Logging every interaction—downloads, webinar attendance, or email responses—provides insight into each prospect's journey.

Organized data makes it easier to prioritize outreach. Categorizing leads by interest level or buying stage enables targeted follow-ups that strengthen relationships and improve conversion rates.

### **Prospects are nurtured through targeted follow-up**

Effective follow-up keeps prospects engaged. Instead of generic messages, tailor communication based on interests and past interactions. Providing valuable content, answering questions, or offering consultations reinforces trust.

A structured follow-up strategy prevents leads from going cold. A mix of emails, calls, and social media touchpoints keeps your business relevant without overwhelming prospects, increasing the chances of long-term engagement.

## **Events and networking**

### **Run educational customer events**

Hosting webinars, workshops, and Q&A sessions provides value while positioning you as a trusted authority. These events give attendees practical insights and demonstrate how your products or services solve their challenges.

These events also strengthen customer relationships and expand your network. Exclusive sessions deepen loyalty, while public events attract new prospects who might not have engaged otherwise.

### **Attend networking events that target prospects**

Industry events create opportunities to connect with potential customers and professionals. Engaging in conversations rather than just pitching builds trust and helps position your business as a valuable solution.

Approach events with a strategy. Identify key attendees, prepare thoughtful questions, and follow up afterward. Staying active in the right circles keeps your business top of mind and leads to new opportunities.

### **Schedule webinars and online meetings**

Webinars and virtual meetings engage prospects regardless of location. These sessions showcase expertise, educate audiences, and provide interactive discussions that strengthen connections.

Well-planned topics aligned with audience interests increase impact. Promoting events through email, social media, and your website attracts attendees, while recorded sessions provide ongoing value.

### **Network of referral partners actively maintained**

Strong referral partnerships create a steady flow of new business. Connecting with professionals who serve a similar audience but offer complementary services leads to mutually beneficial lead generation.

Maintain these relationships by checking in, sharing opportunities, and providing referrals yourself. Joint events or content collaborations further strengthen connections and drive long-term growth.

### **Speaking opportunities sought at industry events**

Speaking at conferences, panels, or workshops positions you as an expert and raises your industry profile. These opportunities help build trust and credibility with potential customers and partners.

Research relevant events and submit proposals for topics that resonate with your target audience. Sharing case studies or practical insights increases your chances of being selected.



## Referral and relationship building

### Regular customer catch-up meetings scheduled

Consistent meetings help maintain strong relationships and keep you informed about evolving customer needs. Monthly or quarterly check-ins provide opportunities to address concerns, offer proactive solutions, and reinforce the value of your partnership.

These meetings also create natural opportunities to introduce additional services and ask for referrals. Satisfied customers are more likely to recommend your business when they feel supported, making regular touchpoints a key driver of long-term engagement and new business.

### Customers are actively asked for referrals

Referrals bring in high-quality leads, but they don't always happen on their own. Actively ask for them in meetings, emails, or calls, expressing your appreciation and making it easy for customers to connect you with others.

Strategic partnerships with professionals who serve your target audience, such as financial planners or lawyers, can also create a steady flow of referrals. Being clear about your niche helps customers and partners refer the right people.

### Partnerships established with complementary businesses

Partnering with businesses that offer complementary services expands your reach and creates mutually beneficial referral opportunities. These collaborations can include co-hosted events, cross-promotions, or simple lead-sharing agreements.

Aligning with trusted businesses increases credibility and attracts high-quality prospects already primed for your services. Whether through strategic alliances or joint marketing efforts, strong partnerships drive growth and enhance your reputation.

### Exclusive offers or loyalty incentives provided to customers

Special offers and loyalty incentives make customers feel valued while encouraging repeat business. Discounts, VIP access, or early product releases can strengthen relationships and enhance customer retention.

Well-timed incentives turn satisfied customers into advocates. When people feel appreciated, they are more likely to share positive experiences, leading to organic referrals and a stronger brand presence.

### Referral program tracked and optimized

A structured referral program helps turn happy customers into a consistent source of new leads. Clear incentives and a simple referral process encourage participation, while tracking results helps refine the program for better outcomes.

Regularly analyzing referral conversion rates and customer feedback allows for ongoing improvements. Adjusting rewards or streamlining the process keeps the program effective, making word-of-mouth a powerful growth driver.



# Cyber security

## Notes

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This is a guide only and should neither replace competent advice, nor be taken or relied upon as financial or professional advice. Seek professional advice before making any decision that could affect your business.

