

Marketing Due Diligence Checklist

Before we invest in creating a campaign, event, piece of content, nurture a conversion email series--any kind of marketing collateral or effort—we must make sure it'll bear the fruit we had planned on.

- Target market
 - Who is the exact human being we want to reach?
 - What do they crave most from us (safety, belonging, mattering)?
 - What are their meta programs (see the Meta Programs Cliff Notes)?
- What's the specific outcome of the marketing event/item?
 - Generate demand or marketing leads
 - Generate disqualified sales leads
 - Bond with clients
 - Raise profile: online, with press, with key influencers, in your community profile raising
 - Boost credibility: with prospects, key influencers, clients, strategic partners
- What are 5 potential topics?
 - What are the pains your prospects suffer from that you can remove?
 - What are compelling futures they need to know about?
 - What are thought-provoking concepts that will benefit them/their world?
 - What will move them to action?
- If an event, what is the layout?
 - If digital: how long, what is the Call To Action (CTA)? What's the backup CTA that has more or less intimacy (white paper = less intimacy, phone call = more intimacy)? What are follow on events? Do you want an exit survey? How interactive should the event be?
 - If physical: how long, food/snacks/wine offered? What is the CTA? The backup CTA?
- What's the Call To Action and the leave behind?
 - What do you want them to do?
 - What do you want them to take away (physically or digitally) to remember you/spur them to action later if we can't get action now?
- How will we track return on investment (ROI) specifically?
 - Opens? Clicks? Registrations? Leads generated? Phone calls generated? Downloads of a white paper? What will move the needle?

Also be sure to see both the sales and marketing kits in this Playbook. They'll provide you will additional frameworks.