MARKETING CHECKLIST.

Keep your marketing on track. Check these off on schedule and you'll always know what's working, what it costs, and where your next customer comes from.

DAILY WEEKLY MONTHLY QUARTERLY ANNUALLY

BUDGET & TRACKING

- [ ] Review new leads and where each one came from — WEEKLY
- [ ] Total this month's marketing spend in one number — MONTHLY
- [ ] Compare each paid channel's cost to its calls, leads, and sales — MONTHLY
- [ ] Log gifts, giveaways, and sponsorships in their own budget line — MONTHLY
- [ ] Cut or fix any channel you can't measure — QUARTERLY
- [ ] Set next year's marketing budget and goals — ANNUALLY

WEBSITE

- [ ] Confirm hours, phone, services, and pricing are current — MONTHLY
- [ ] Update team bios and photos — QUARTERLY
- [ ] Check for broken links and errors in Google Search Console — QUARTERLY
- [ ] Test tap-to-call and the contact form on your phone — QUARTERLY
- [ ] Renew your domain and hosting, and review every page — ANNUALLY

REVIEWS & REPUTATION

- [ ] Ask every happy customer for a review, with a direct link — DAILY
- [ ] Reply to every new review, good or bad — WEEKLY
- [ ] Track your review count and rating on Google, Yelp, and industry sites — MONTHLY
- [ ] Feature your best reviews on your website and social media — QUARTERLY

LOCAL VISIBILITY

- [ ] Post on social media at least once — WEEKLY
- [ ] Post an update and new photos to your Google Business Profile — MONTHLY
- [ ] Update holiday hours on Google, your website, and social media — MONTHLY
- [ ] Check your name, address, phone, and hours match everywhere online — QUARTERLY

COMMUNITY & FOLLOW-UP

- [ ] Ask every new customer how they heard about you, and track it — DAILY
- [ ] Send past customers an email or text — MONTHLY
- [ ] Partner with a local business, like gift cards for customer thank-yous — QUARTERLY
- [ ] Plan the year's community events and sponsorships — ANNUALLY

OUTREACH & CREATIVITY

- [ ] Hold a 30-minute marketing brainstorm with your team — MONTHLY
- [ ] Test two versions of an ad, offer, or headline and keep the winner — MONTHLY
- [ ] Try one new outreach channel, traditional or digital — QUARTERLY
- [ ] Review the year: what worked, what didn't, and what to try next — ANNUALLY

PRO TIP

LET AI CONNECT THE DOTS.

Your marketing numbers live in a lot of places: Google, Facebook, your website, your phone, and your sales. Once a month, ask an AI tool like ChatGPT or Claude to pull them together into one simple summary. Seeing it all side by side shows you what is actually bringing in customers, so you know what to do more of, what to cut back, and where your next dollar will do the most good.

NEED HELP CHECKING THESE OFF?

Word & Wire handles it for you, so you can focus on your business and your customers.

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