



FROM STRATEGY TO SCALE

**THE ULTIMATE GROWTH
CHECKLIST FOR B2B LEADERS**



Hello and welcome,

I'm Seb Hardman, Managing Director at Digital Litmus. This guide is here to help you confidently navigate the complex landscape of B2B digital growth. Whether you're starting out or optimising your strategies, this checklist will keep you on the path to sustainable growth.

What is this guide?

This guide breaks down the essential elements of our Fusion Model, a comprehensive framework we've developed to drive Connected Growth. The Fusion Model aligns your marketing, sales, and customer service efforts into a cohesive growth strategy. Each section delves into a specific element of the Fusion Model, offering practical insights and actionable steps to implement best practices in your business.

How to use this guide?

You can read it from end-to-end or jump into sections as needed. Use this guide as a checklist to audit and enhance your digital growth strategies. Each section includes: detailed explanations, why it's important, a checklist of key activities to ensure best practices, and further resources.

Why Connected Growth?

In today's digital world, fragmented and disconnected efforts lead to inefficiencies and missed opportunities. Connected Growth is the alignment of your go-to-market activity towards common goals, ensuring your strategies are unified and effective. This guide encapsulates our proven methods to help you achieve similar success.

At Digital Litmus, we've seen how our Fusion approach transforms B2B businesses. So let's embark on this journey together and ensure you're on the path to Connected Growth.

Good luck!

Seb Hardman
Managing Director @ Digital Litmus

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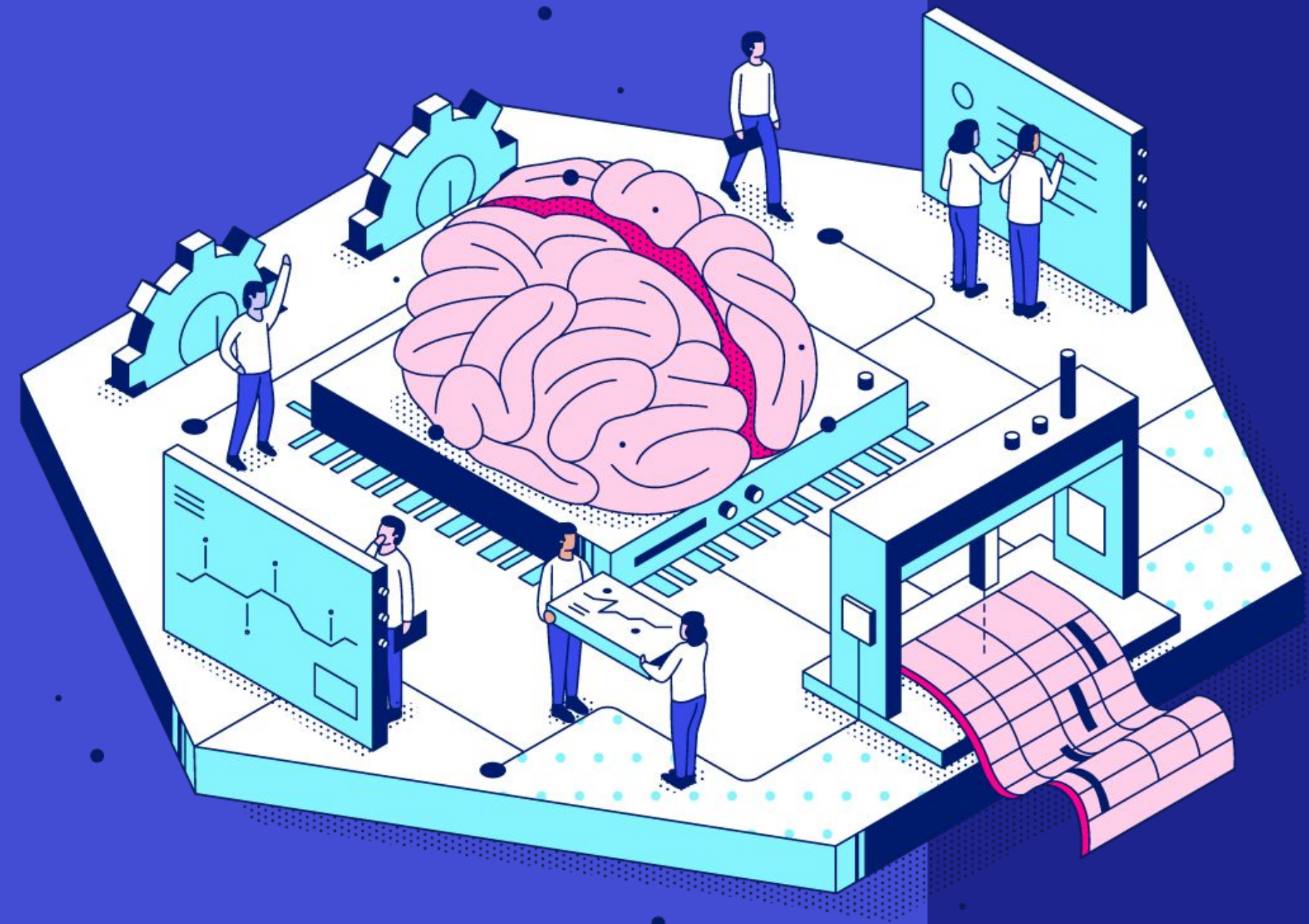
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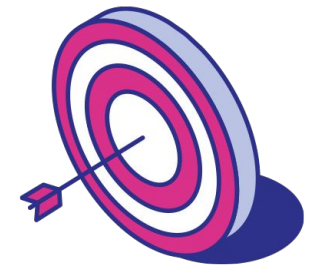
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STRATEGY



Goals and Key Performance Indicators (KPIs)

What?

Clear, achievable goals form the foundation of any successful strategy. Goals provide direction and help to prioritise efforts, while Key Performance Indicators (KPIs) are specific metrics used to measure the effectiveness of your actions towards achieving these goals. SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals provide clarity and focus, guiding marketing, sales, and customer service efforts towards measurable success.

Why?

Clear goals and KPIs align team members on common objectives, improving organisational focus and efficiency. They **enable the measurement of performance**, ensuring strategies are effective and resources are well-utilised, thus maximising ROI. By monitoring progress with specific targets, businesses can identify areas for improvement and make necessary adjustments.



Checklist

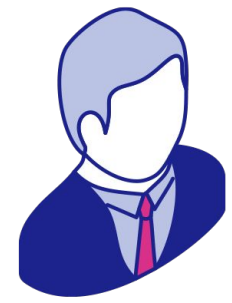
- ☐ We define clear objectives to establish what success looks like for our business in the short and long term, ensuring they align with our business vision and mission.
- ☐ We set SMART goals that are Specific, Measurable, Achievable, Relevant, and Time-bound to create a clear path to success.
- ☐ We identify KPIs that accurately measure the performance of our objectives, using a mix of leading and lagging indicators.
- ☐ We regularly review and adjust our strategy based on KPIs and market conditions to stay on track.
- ☐ We communicate goals and progress with all stakeholders to keep everyone aligned and motivated.

RESOURCES

[HubSpot: Guide to Key Performance Indicators](#)

[WhatMatters: OKR Examples](#)

[MindTools: SMART Goals](#)



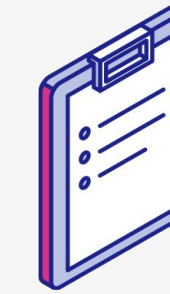
Buyer Personas and Ideal Customer Profiles

What?

Buyer Personas are detailed profiles of your ideal customers, created based on market research and real data about your existing customers. They help you understand your customers' needs, behaviours, and pain points, allowing you to tailor your marketing efforts effectively. **Ideal Customer Profiles (ICPs)** define the perfect customer for what your organisation solves, outlining the attributes of the companies you want to target, such as size, industry, and revenue.

Why?

Buyer Personas and ICPs are essential for targeting the right audience and tailoring your marketing efforts. They help you focus your efforts on qualified prospects, meet customer needs, and align your marketing, sales, and services across the organisation. This approach ensures your marketing resources are used efficiently, maximising ROI and contributing to sustained business growth.



Checklist

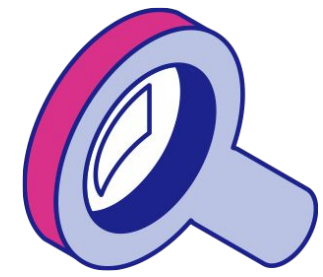
- ☐ We research and gather data on our existing customers to create accurate and detailed Buyer Personas.
- ☐ We define key characteristics of our ideal customers, including demographics, job roles, pain points, and goals.
- ☐ We create Ideal Customer Profiles (ICPs) that specify the attributes of the businesses we want to target, such as industry, size, and revenue.
- ☐ We document and share our Buyer Personas and ICPs with our marketing, sales, and service teams to ensure alignment and consistency.
- ☐ We regularly update our Buyer Personas and ICPs based on new data and market changes to keep our strategies relevant and effective.

RESOURCES

[HubSpot: How to Create Detailed Buyer Personas for Your Business](#)

[The CMO: How to Create an Ideal Customer Profile](#)

[CXL: Define your ideal customer](#)



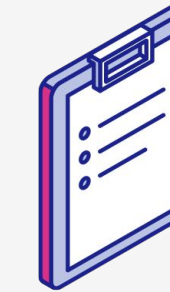
Competitor Analysis

What?

Competitor analysis involves **researching and evaluating your competitors** to understand their strategies, strengths, and weaknesses. This process includes gathering both subjective insights and data-driven metrics to benchmark your performance against competitors. It helps you identify market gaps and develop strategies to differentiate your offerings.

Why?

Competitor analysis **helps you understand the competitive landscape**, identify opportunities and threats, and make informed decisions. By knowing what your competitors are doing well and where they fall short, you can position your business more effectively, stay ahead of the competition, and optimise your marketing efforts for growth.



Checklist

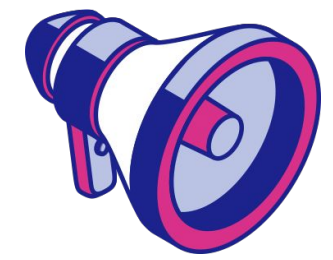
- ☐ We identify our top competitors based on size, target market, location, or brand positioning.
- ☐ We gather both subjective and data-driven insights about our competitors, including their website performance, SEO rankings, and content strategies.
- ☐ We analyse competitors' strengths and weaknesses to identify opportunities for differentiation and improvement.
- ☐ We create a comparison table to highlight key takeaways and dramatic differences between us and our competitors.
- ☐ We regularly update our competitor analysis to stay informed about market changes and adjust our strategies accordingly.

RESOURCES

[HubSpot: How to Conduct a Competitive Analysis](#)

[SEMRush: What Is a Competitive Analysis & How to Do It](#)

[Moz: How to Do an SEO Competitor Analysis](#)



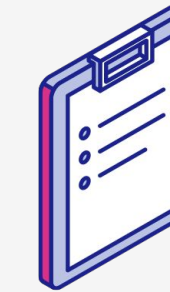
Brand and Messaging

What?

Establishing a strong brand and clear messaging is fundamental to **differentiating your business in a crowded market**. Branding is the synthesis of the distinctive value you bring to your target market, while messaging is how you communicate that value consistently across all channels. Effective branding and messaging align with your company's values, resonate with your audience, and are consistently reflected in every piece of content and communication.

Why?

A strong brand and clear messaging **build trust, communicate your value proposition, and connect with your audience on a deeper level**. They help you stand out in the marketplace, foster customer loyalty, and drive business growth. Consistent messaging ensures your audience understands what your brand stands for and why it matters, making your communications more memorable and effective.



Checklist

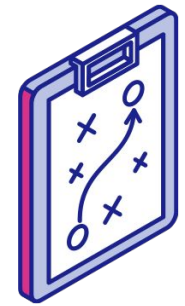
- ☐ We define our unique value proposition and ensure it is consistently communicated across all touchpoints.
- ☐ We develop a clear and concise brand positioning statement that encapsulates what our business stands for.
- ☐ We create key messages that highlight our brand's strengths, benefits, and unique selling points, and ensure these are embedded throughout our content.
- ☐ We align our tone of voice with our brand values and audience expectations, ensuring consistency in all communications.
- ☐ We regularly review and refine our messaging based on feedback and market changes to keep it relevant and effective.

RESOURCES

[HubSpot: How to Write a Great Value Proposition](#)

[Stripe: How to write key messages](#)

[Hootsuite: How to Build a Strong Brand Voice on Social Media \(and Beyond\)](#)



Marketing Experimentation

What?

Marketing experimentation involves testing various marketing strategies, tactics, and channels to determine what works best for your business. This process includes A/B testing, multivariate testing, and piloting new campaigns and initiatives on a small scale before rolling them out broadly. The goal is to gather data-driven insights that inform your marketing decisions, optimise your efforts, and maximise ROI.

Why?

What worked yesterday might not work tomorrow. Marketing experimentation allows you to stay ahead of the curve by continuously testing and refining your strategies. This approach helps identify the most effective methods for reaching and engaging your target audience, reducing wasted resources, and driving better results. By embracing a culture of experimentation, businesses can make informed decisions, innovate faster, and maintain a competitive edge.



Checklist

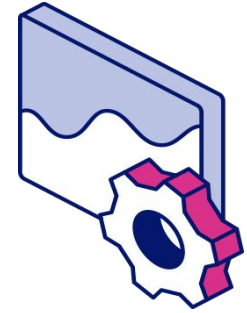
- ☐ We set clear objectives and hypotheses for each marketing experiment to ensure our goals are well-defined and measurable.
- ☐ We use A/B testing to compare different versions of a campaign, landing page, email, or other asset to identify which performs better.
- ☐ We use multivariate testing to examine the impact of multiple variables and understand their combined effects.
- ☐ We analyse the results of our experiments using relevant metrics and KPIs to determine the effectiveness of each strategy.
- ☐ We optimise based on the insights from our experiments, refining our approach to achieve the best outcomes.

RESOURCES

[Cognism: How to Run a Marketing Experiment](#)

[HubSpot: How to Conduct the Perfect Marketing Experiment](#)

[Metadata: The Framework You Need for Successful Marketing Experimentation](#)



Sales & Marketing Alignment

What?

Sales and marketing alignment is the process of integrating the goals, strategies, and efforts of sales and marketing teams to work as a cohesive unit. This involves regular communication, shared objectives, and collaborative strategies to ensure both teams are driving towards common business goals.

Why?

Aligning sales and marketing is crucial for creating a seamless customer journey, improving lead quality, and increasing conversion rates. Companies with aligned sales and marketing teams achieve faster profit growth and higher customer retention rates. When these teams work together, they can also improve the customer experience, resulting in higher spending by leads nurtured through aligned efforts compared to those left to make purchases independently.



Checklist

- ☐ We set up regular meetings between sales and marketing teams to foster communication and collaboration.
- ☐ We create shared resources and comms channels to facilitate information sharing and ensure both teams are kept in the loop.
- ☐ We define clear, shared goals and metrics to measure the success of our alignment efforts.
- ☐ We develop a comprehensive content creation process that incorporates feedback from sales to address customer pain points.
- ☐ We celebrate successes together to build team spirit and maintain motivation.

RESOURCES

[HubSpot: 10 Tried-and-True Tips for Sales and Marketing Alignment](#)

[HubSpot: Free SLA Template for Sales & Marketing](#)

[CapsuleCRM: How to Align Sales & Marketing](#)



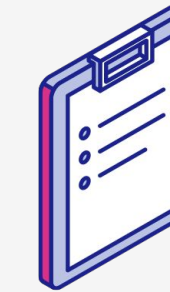
Go-To-Market Strategy

What?

A **Go-To-Market (GTM) strategy** outlines how you plan to engage with customers to promote and sell your products or services. This strategy is designed to ensure that all marketing efforts are cohesive, targeted, and efficient, addressing specific Ideal Customer Profiles (ICPs) and personas. Key components of an effective GTM strategy include understanding customer pain points, integrating sales and marketing efforts, and using data-driven insights to tailor campaigns.

Why?

A well-crafted GTM strategy brings everything together to ensure that growth activities are not conducted in isolation but are instead a part of an integrated approach. This reduces the risk of fragmented growth and inefficiencies, providing a clear roadmap for addressing the entire buyer journey. When sales and marketing are aligned, campaigns are persona-focused and personalised, businesses can expect higher engagement rates, more qualified leads, and ultimately, increased sales.



Checklist

- ☐ We have detailed profiles for our ideal customers and buyer personas, ensuring our strategy addresses their specific needs and pain points.
- ☐ We set clear objectives and KPIs measuring the goals for our GTM strategy, such as lead gen targets, conversion, and revenue.
- ☐ We align sales and marketing teams to ensure a cohesive approach, with shared goals and collaborative planning.
- ☐ We run integrated campaigns with a mix of marketing channels (e.g., email, social media, paid ads) covering the entire buyer journey.
- ☐ We regularly review and adjust our strategy based on performance data and feedback from our sales and marketing teams.

RESOURCES

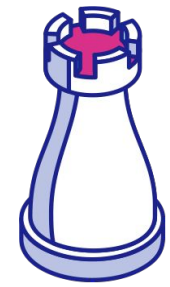
[HubSpot: What is a Go-To-Market Strategy?](#)

[Cognism: What is a Go-to-Market Strategy? Guide for Enterprises](#)

[Asana: How to create a go-to-market strategy](#)



CONTENT



Content Strategy

What?

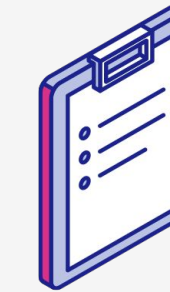
A content strategy is a comprehensive plan that defines how your content will be created, managed, and distributed to achieve specific business objectives.

It involves aligning content production with buyer personas and integrating content across multiple channels, including email, social media, and more. A robust content strategy ensures that every piece of content serves a strategic purpose and contributes to a cohesive customer experience. It encompasses both hearts (positioning & high-value) and minds (SEO-focused) content .

Why?

A well-designed content strategy enhances marketing effectiveness, ensuring each piece of content delivers results and boosts your overall marketing ROI.

By tailoring content to meet the needs of your audience and aligning it with business goals, you can improve brand visibility, drive traffic, and generate leads. This approach also supports your sales and customer service teams, providing them with valuable resources to engage and nurture prospects throughout the buyer journey.



Checklist

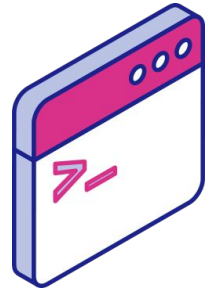
- ☐ We align our content strategy with buyer personas, ensuring that content addresses their needs and pain points.
- ☐ We integrate content across multiple channels, including email, social media, and more, to maximise reach and engagement.
- ☐ We ensure that each piece of content serves a strategic purpose, contributing to overall business objectives.
- ☐ We regularly review and update our content strategy based on performance data and market trends to keep it effective.
- ☐ We collaborate with our sales and customer service teams to create content that supports their efforts and addresses customer queries.

RESOURCES

[HubSpot: How to Develop a Content Strategy in 7 Steps: A Start-to-Finish Guide](#)

[Content Marketing Institute: Developing a Content Marketing Strategy](#)

[Hootsuite: How to Create a Social Media Calendar and Stay Organized](#)



SEO Keyword Research

What?

SEO keyword research involves identifying and analysing the terms that people use in search engines to find information related to your business. This process helps you understand what keywords to target in your content to improve search engine rankings and attract relevant traffic. Effective keyword research includes finding both short-tail and long-tail keywords at different stages of the buyer journey that align with your business goals.

Why?

Keyword research is crucial for improving your search engine visibility and driving organic traffic to your website. By targeting the right keywords, you can ensure your content meets the needs of your audience and ranks well in search engine results. This leads to increased website traffic, higher engagement rates, and ultimately, more leads. Understanding and using relevant keywords helps you stay competitive and ensures your content is discoverable by the right audience.



Checklist

- ❑ We identify a mix of short-tail and long-tail keywords at different stages of the buyer journey relevant to our industry and audience.
- ❑ We use tools like Ahrefs, SEMRush, and Moz to conduct thorough keyword research and analysis.
- ❑ We organise keywords into clusters and create content around high-priority terms to maximise SEO impact.
- ❑ We regularly review and update our keyword strategy based on performance data and market trends.
- ❑ We balance SEO with thought leadership, ensuring our content remains high-quality and valuable to our audience.

RESOURCES

[Moz: The Beginner's Guide to SEO](#)

[Ahrefs: Keyword Research: The Beginner's Guide](#)

[HubSpot: How to Do Keyword Research for SEO](#)

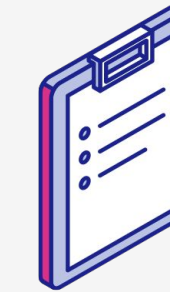


What?

Blogging for your business involves **creating regular, valuable content that addresses your audience's needs, answers their questions, and provides insights into your industry.** A successful blog can attract more visitors to your website, convert those visitors into leads, and establish your business as an authority in your field. Blogging involves planning, writing, publishing, and promoting content that is aligned with your business goals and audience interests.

Why?

Blogging is a powerful tool for **improving your search engine visibility and driving organic traffic to your website.** Each blog post you publish is an opportunity to rank for new keywords and attract new visitors. Blogging helps build trust and authority by consistently providing valuable information, which can lead to increased customer loyalty and sales. Additionally, blogs can serve as a content hub for your social media and email marketing efforts, ensuring a cohesive and integrated marketing strategy.



Checklist

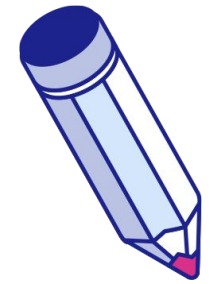
- ☐ We define clear goals for our blog, such as increasing brand visibility, generating leads, or establishing thought leadership.
- ☐ We identify and understand our target audience, creating content that addresses their needs and interests.
- ☐ We plan our content using an editorial calendar to ensure consistency and relevance.
- ☐ We optimise each blog post for SEO, including keyword research and on-page optimisation techniques.
- ☐ We promote blog content across multiple channels, including social media and email, to maximise reach and engagement.

RESOURCES

[HubSpot: How to Create a Successful Blog Strategy: A Step-by-Step Guide](#)

[Grow & Convert: How to Run an Effective Yet Manageable B2B Blog Strategy](#)

[Backlinko: How to write a blog post: the definitive guide](#)



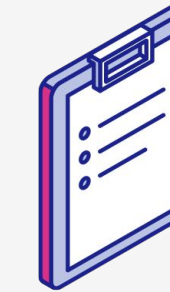
Guest Blogging

What?

Guest blogging involves writing and publishing articles on other websites to reach a broader audience, build relationships with other bloggers, and enhance your SEO by acquiring high-quality backlinks. This strategy helps in establishing authority, driving referral traffic, and improving your site's search engine rankings.

Why?

Guest blogging is a powerful tool for expanding your brand's reach and credibility. By contributing valuable content to reputable sites in your industry, you can attract new audiences, foster relationships, and gain high-quality backlinks that boost your SEO efforts. Additionally, guest blogging positions your brand as a thought leader and builds trust with potential customers. It also provides opportunities for networking and collaboration with other industry experts, which can lead to further business opportunities.



Checklist

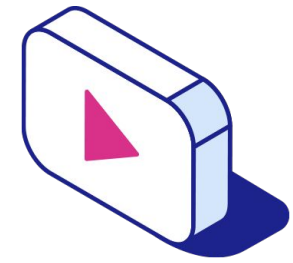
- ☐ We research and identify reputable sites with high domain authority and relevance to our industry for guest blogging opportunities.
- ☐ We brainstorm and select topics that align with our business goals and are valuable to the target audience of the guest site.
- ☐ We reach out to blog owners with a well-crafted pitch that demonstrates the value we can offer their readers.
- ☐ We write high-quality, SEO-optimised content that includes 1-2 links to our relevant web pages.
- ☐ We track and measure the performance of our guest posts, focusing on referral traffic, backlinks, and SEO improvements.

RESOURCES

[HubSpot: Everything You Need to Know about Guest Blogging](#)

[OptInMonster: Guest Posting 101: How To Pitch and Secure Your Next Guest Blog Spot](#)

[Backlinko: Guest Blogging: The Definitive Guide](#)



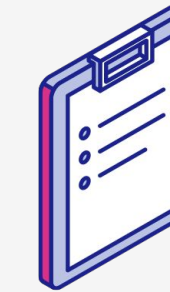
Webinars

What?

Webinars are live, interactive online events where a host presents on a topic, often with the opportunity for audience participation through Q&A sessions, polls, and chat. Webinars can take various formats, including panel discussions, single-speaker presentations, interviews, and product demonstrations. They are an effective way to engage with your audience, provide valuable content, and establish your business as an authority in your industry.

Why?

Webinars are a cost-effective way to reach a broad audience without the logistical challenges of in-person events. They allow you to demonstrate expertise, educate your audience, and generate leads. Hosting webinars can significantly boost brand awareness, foster customer relationships, and drive conversions. Additionally, webinars can be recorded and repurposed as evergreen content, extending their value long after the live event.



Checklist

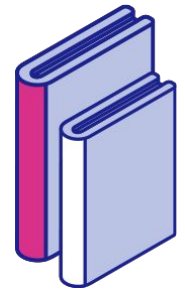
- ☐ We identify engaging topics and formats that align with our audience's interests and our business goals.
- ☐ We choose the right webinar platform and ensure it meets our technical and audience needs.
- ☐ We create compelling and interactive content, including slides, videos, and polls, to keep the audience engaged.
- ☐ We promote the webinar effectively through email, social media, and a dedicated landing page.
- ☐ We follow up with attendees post-webinar to gather feedback, answer questions, and nurture leads.

RESOURCES

[HubSpot: How to Create an Amazing Webinar in 2024](#)

[BigMarker: Webinars & Events for Demand Generation: The Ultimate Guide](#)

[G2: How to Host a Webinar That'll Keep Them Coming Back for More](#)



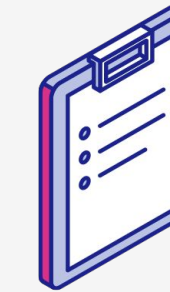
Premium Content Offers

What?

Premium content offers are high-value pieces of content, such as eBooks, white papers, templates, webinars, and guides, that are typically gated behind a form requiring user information for access. These offers are designed to attract, engage, and convert potential leads by providing valuable insights or tools that address the specific needs and challenges of your target audience.

Why?

Creating premium content offers is an effective strategy for generating qualified leads and nurturing prospects through the buyer's journey. These offers help establish your authority and expertise in the industry, making it easier to build trust and credibility with your audience. Gated content also provides valuable data on potential customers, allowing for better segmentation and targeted marketing efforts. Moreover, premium content can differentiate your brand from competitors by showcasing the unique value and insights your business provides.



Checklist

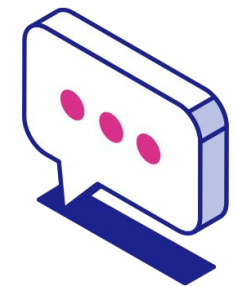
- ☐ We identify key topics that resonate with our target audience and address their pain points and interests.
- ☐ We create valuable content that provides actionable insights and solutions, ensuring it aligns with our business offerings.
- ☐ We design compelling landing pages with clear calls-to-action (CTAs) and simple forms for easy access to the content.
- ☐ We promote our premium content offers through various channels, including email marketing, social media, and our website.
- ☐ We track and analyse the performance of our content offers to optimise future content and improve lead generation efforts.

RESOURCES

[HubSpot: How to Create Marketing Offers That Don't Fall Flat](#)

[Content Marketing Institute: Gated Content Best Practices](#)

[How to Craft Lead Magnets Your Customers Can't Ignore](#)



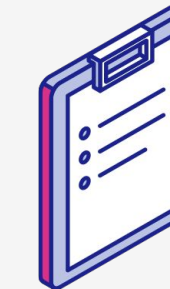
Case Studies

What?

Case studies are detailed stories of how your business helped a specific client overcome challenges and achieve their goals. They showcase real-life applications of your products or services, highlighting the problem, solution, and results. Case studies often include client testimonials, quantitative data, and visual aids to create a compelling narrative.

Why?

Creating case studies is essential because they serve as powerful tools for demonstrating your expertise and building trust with potential clients. They provide social proof by showing tangible results and success stories from other customers, which can significantly influence prospects' decision-making processes. Case studies also help to highlight your problem-solving abilities, showcase industry-specific knowledge, and establish your brand's credibility and authority.



Checklist

- ☐ We identify suitable clients who have achieved notable success using our products or services.
- ☐ We conduct thorough interviews with these clients to gather detailed insights and authentic quotes.
- ☐ We structure case studies to include a clear problem statement, the solution provided, and measurable results.
- ☐ We use engaging visuals and data to support the narrative and make the content more relatable.
- ☐ We promote case studies across various marketing channels, such as our website, email, and social media.

RESOURCES

[HubSpot: How to Write a Case Study: Bookmarkable Guide & Template](#)

[CXL: How to Write Better B2B Case Studies: 2 Lessons from Psychology](#)

[Forbes: The Importance Of Multi-Format Case Studies In Marketing](#)

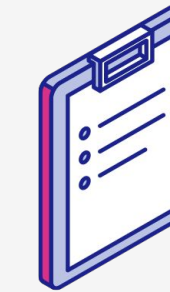


What?

Testimonials are endorsements from satisfied customers that highlight the positive experiences and outcomes they've had with your products or services. These can come in various formats, such as written quotes, video testimonials, audio recordings, or social media posts. Effective testimonials are specific, relatable, and showcase genuine benefits that resonate with potential clients.

Why?

Incorporating testimonials into your marketing strategy is crucial because they serve as powerful social proof, helping to build trust and credibility with potential clients. Testimonials provide third-party validation of your business, showcasing real success stories and the tangible benefits of your products or services. This can significantly influence prospects' buying decisions by illustrating the value you provide through authentic customer experiences.



Checklist

- ☐ We identify satisfied clients who can provide detailed and specific testimonials.
- ☐ We choose the right format for each testimonial, whether written, video, or audio, to best capture the client's story.
- ☐ We ask targeted questions to elicit meaningful and specific feedback about our products or services.
- ☐ We ensure each testimonial includes clear attributions, such as the client's name, company, and position, to enhance credibility.
- ☐ We showcase testimonials across various marketing channels, including our website, social media, and email campaigns.

RESOURCES

[HubSpot: The Ultimate Guide to Customer Reviews and Testimonials](#)

[Best Practices for Customer Reviews and Testimonials](#)

[Forbes: How To Leverage Customer Testimonials And Create Brand Advocates](#)



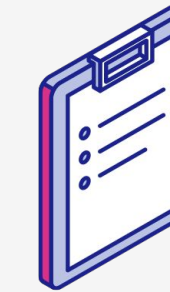
Review Sites

What?

Review sites such as G2, Clutch, and Google are platforms where customers can leave feedback about their experiences with your products or services. These reviews can significantly influence potential buyers by providing social proof and enhancing your brand's credibility. Leveraging these platforms effectively involves gathering, managing, and responding to reviews, and integrating this feedback into your marketing strategies.

Why?

Utilising review sites is crucial because they build trust with potential customers by showcasing genuine user experiences and satisfaction. Positive reviews can enhance your brand reputation, drive more organic traffic, and improve SEO rankings. Moreover, these sites often have high domain authority, making them excellent sources for quality backlinks. Engaging with reviewers also helps strengthen customer relationships and gather valuable insights for product improvement.



Checklist

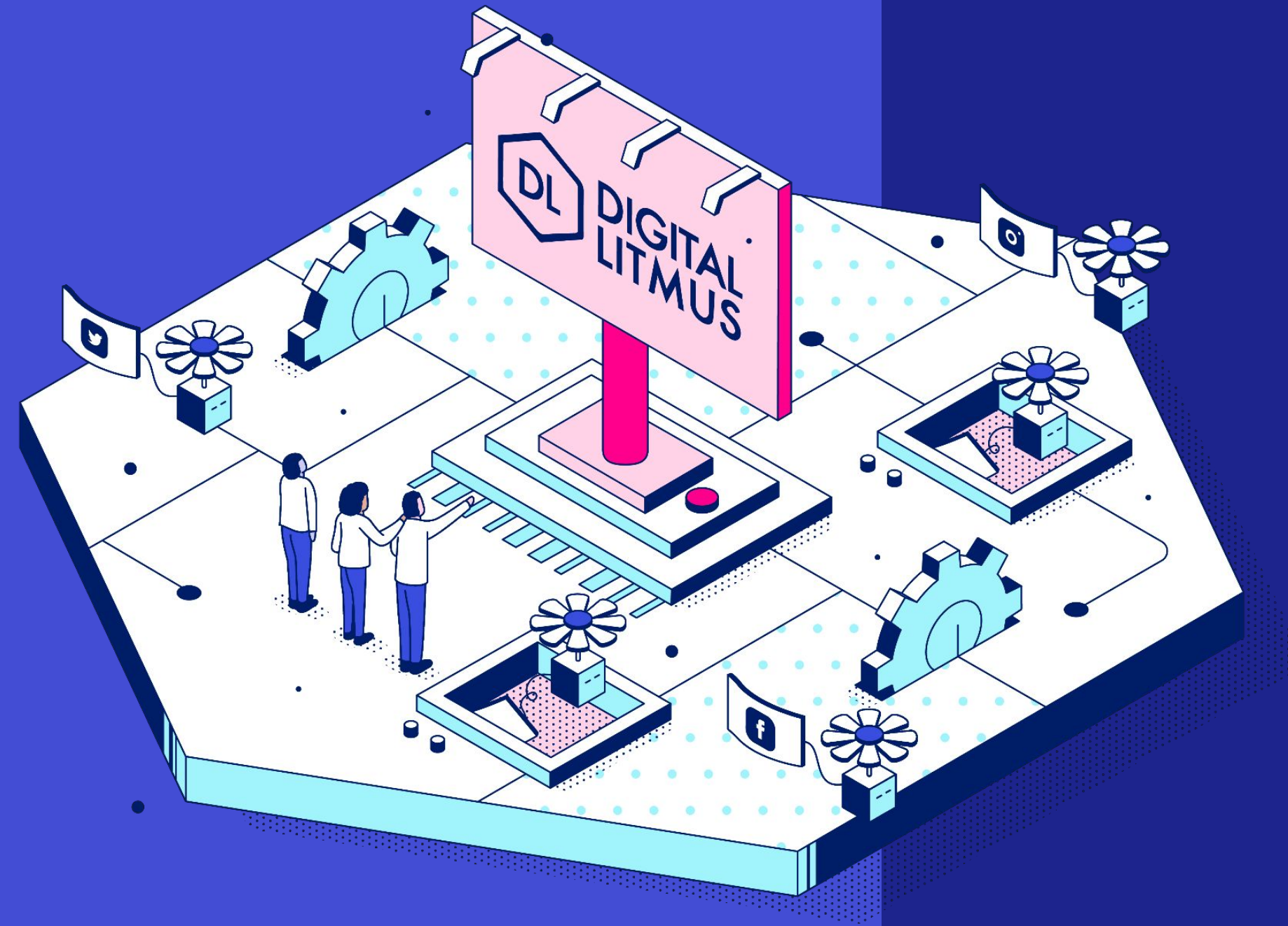
- ☐ We claim and optimise our profiles on key review sites, ensuring they are complete with accurate and up-to-date information.
- ☐ We actively encourage satisfied customers to leave reviews, using direct requests and automated follow-up emails.
- ☐ We respond to all reviews, both positive and negative, in a timely and professional manner to show appreciation and address any concerns.
- ☐ We leverage positive reviews in our marketing materials, including on our website, social media, and email campaigns.
- ☐ We analyse the feedback to identify trends and areas for improvement, using these insights to refine our products and services.

RESOURCES

[SproutSocial: Creating an online review management strategy](#)

[Gartner: From Reviews to Repeat Business: How to Build a Customer Review Strategy](#)

[Zendesk: A business's guide to customer reviews](#)



CAMPAIGNS



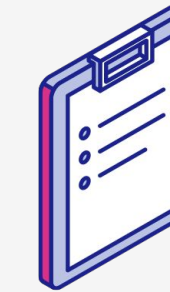
Search Engine Marketing

What?

Search Engine Marketing (SEM) involves using paid ads to increase visibility in search engine results pages (SERPs). It includes activities like keyword research, ad creation, campaign management, and performance analysis to ensure that ads reach the right audience at the right time.

Why?

SEM is a key tool for quickly gaining visibility in competitive markets. By targeting specific keywords and demographics, businesses can attract highly qualified traffic to their websites. This leads to higher conversion rates and a better return on investment (ROI). SEM also allows for precise tracking and analytics, enabling continuous optimisation of campaigns to maximise their effectiveness.



Checklist for Best Practices

- ☐ We define clear campaign goals, such as increasing brand awareness, generating leads, or driving sales, and set metrics to track success.
- ☐ We conduct thorough keyword research to identify relevant and high-performing keywords that align with our audience's search intent.
- ☐ We create targeted ad copy and landing pages that are relevant to the selected keywords and designed to maximise conversion rates.
- ☐ We set up and manage PPC campaigns using platforms like Google Ads, ensuring we segment our campaigns and ad groups effectively for optimal performance.
- ☐ We monitor and optimise campaigns by analysing performance data, adjusting bids, testing ad copy, and refining targeting.

RESOURCES

[HubSpot: Search Engine Marketing \(SEM\): Ultimate Guide](#)

[SEMRush: Guide to Paid Search Ads: Definition + How to Set up Campaigns](#)

[Ahrefs: PPC Marketing: Beginner's Guide to Pay-Per-Click Ads](#)



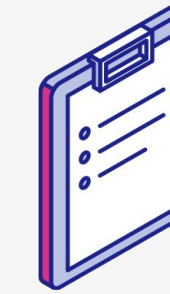
Social Media Advertising

What?

Social media advertising involves using paid strategies to promote your products or services on social media platforms like LinkedIn, Facebook, and Twitter. These campaigns can include various ad formats such as image ads, video ads, carousel ads, and sponsored posts. The goal is to reach a targeted audience, increase brand visibility, and drive conversions.

Why?

It allows you to target specific demographics, interests, and behaviours, ensuring that ads reach the most relevant audience. This precision targeting leads to higher engagement rates and better ROI. Additionally, social media platforms offer robust analytics and reporting tools, enabling continuous optimisation of ad campaigns to improve performance. Social media ads also help increase brand awareness, generate leads, and drive sales by reaching users where they spend a significant amount of their time.



Checklist for Best Practices

- ☐ We set clear campaign objectives, such as brand awareness, lead generation, or sales, and align them with our overall business goals.
- ☐ We conduct thorough audience research to define our target demographics, interests, and behaviours.
- ☐ We create compelling and engaging ad content tailored to the specific platform and audience.
- ☐ We utilise platform-specific features, such as LinkedIn's company targeting options to enhance ad effectiveness.
- ☐ We continuously monitor and optimise based on performance data, adjusting targeting, ad creatives, and budgets as needed.

RESOURCES

[HubSpot: The Ultimate Guide to Social Media Marketing Campaigns](#)

[Neil Patel: Ultimate Guide to Paid Media](#)

[BigCommerce: Navigating Social Media Advertising](#)



Organic Social Posting

What?

Organic social posting involves sharing content on social media platforms without paid promotion. This includes posts on Facebook, Twitter, LinkedIn, Instagram, and other platforms, where the content is aimed at engaging followers, building community, and driving organic traffic to your website.

Why?

Organic social posting is great for establishing a consistent brand presence and fostering direct engagement with your audience. It builds trust and credibility by regularly sharing valuable content, interacting with followers, and showcasing your brand's personality. Effective organic social strategies can enhance customer loyalty, improve brand awareness, and create a strong foundation for paid campaigns. Additionally, organic social media provides insights into audience preferences and behaviours, which can inform broader marketing strategies.



Checklist for Best Practices

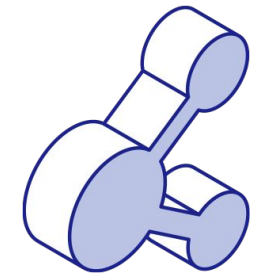
- ☐ We define clear goals for our organic social strategy, such as increasing engagement, building brand awareness, or driving traffic to our website.
- ☐ We conduct audience research to understand where our target audience is most active and what types of content they engage with.
- ☐ We create a content calendar to plan and schedule posts consistently across all relevant platforms.
- ☐ We leverage a mix of content types, including text, images, videos, and interactive content, to keep our audience engaged.
- ☐ We regularly analyse performance metrics, such as engagement rates, reach, and click-through rates, to refine our strategy and improve results.

RESOURCES

[HubSpot: Social Media Marketing: The Ultimate Guide](#)

[Social media marketing: What it is and how to build your strategy](#)

[Hootsuite: How to Create a Social Media Marketing Strategy in 9 Easy Steps](#)



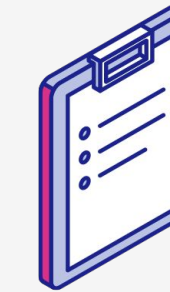
Content Marketing

What?

Content marketing involves sharing and promoting your created content across various channels to reach a broader audience. It includes using owned, earned, and paid distribution channels to ensure your content is seen by the right people at the right time. Effective distribution amplifies the reach and impact of your content, driving engagement and conversions.

Why?

Effective content marketing is critical for maximising the impact of your content efforts. Great content is of little use if it doesn't reach your target audience. By strategically distributing content, you can increase visibility, drive more traffic, and generate leads. It also helps in building brand authority and trust, as well as improving SEO rankings through diverse backlinks and mentions across the web.



Checklist for Best Practices

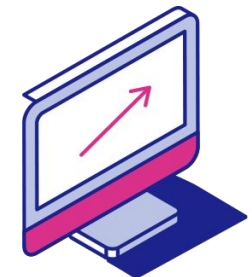
- ☐ We research our target audience to understand where they consume content and what types of content they prefer.
- ☐ We utilise a mix of owned, earned, and paid distribution channels to maximise our content's reach and effectiveness.
- ☐ We create an editorial calendar to plan and schedule content distribution activities consistently.
- ☐ We leverage social media, email marketing, and content syndication to distribute content across various platforms.
- ☐ We measure and analyse the performance of our content distribution efforts to continuously refine and improve our strategy.

RESOURCES

[The Ultimate Guide to Content Distribution](#)

[Content Marketing Institute: Reach a Wider Audience, Step Up Your Content Distribution...](#)

[BrandTheory: How to Create a B2B Content Distribution Strategy in 2024](#)



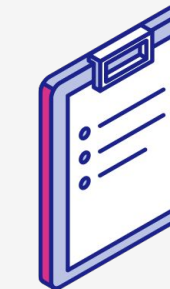
Re-Engagement Campaigns

What?

Re-engagement campaigns are targeted efforts to reconnect with inactive or disengaged contacts in your database. These campaigns typically involve a series of emails designed to reignite interest, address potential concerns, and provide compelling reasons for contacts to re-engage with your brand.

Why?

Re-engagement campaigns are essential for maintaining a healthy email list and maximising your marketing ROI. By reactivating dormant leads, you can increase the effectiveness of your email marketing efforts, improve your sender reputation, and drive more conversions without the need for extensive new lead generation. These campaigns also provide valuable insights into why contacts became disengaged, allowing you to refine your marketing strategies.



Checklist for Best Practices

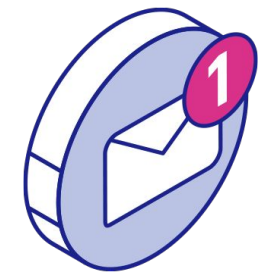
- ☐ We identify inactive contacts and segment them based on factors like the time since last engagement or activity level.
- ☐ We craft personalised and compelling re-engagement emails with offers, surveys, and updates on product improvements.
- ☐ We use engaging subject lines and clear calls-to-action (CTAs) to encourage recipients to interact with the email.
- ☐ We monitor and analyse the performance of our re-engagement campaigns, using metrics such as open rates, click-through rates, and conversion rates.
- ☐ We follow up with additional touches if necessary and clean our email list by removing contacts who remain unresponsive.

RESOURCES

[Customer Win-Back Campaigns: How to Get Previous Buyers Back on Track](#)

[Mailtrap: Re-Engagement Emails: How to Win Back Your Audience's Attention](#)

[How to Make a Killer Re-engagement Email Sequence and Win Back Lost Subscribers...](#)



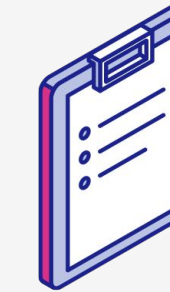
Retention & Upsell Campaigns

What?

Retention and upsell campaigns focus on keeping existing customers engaged and encouraging them to purchase additional products or services. These campaigns leverage customer data to offer tailored recommendations and promotions that add value to the customer's current experience.

Why?

Retention and upsell campaigns are vital for maximising customer lifetime value (CLV) and driving sustainable business growth. Retaining existing customers is more cost-effective than acquiring new ones, and satisfied customers are more likely to purchase additional products or services. Effective retention strategies help build long-term customer loyalty, while upselling ensures that customers derive maximum value from your offerings, increasing overall revenue and enhancing customer satisfaction.



Checklist for Best Practices

- ☐ We segment our customer base to tailor retention and upsell strategies based on customer behaviour and preferences.
- ☐ We create personalised communication plans that address the specific needs and interests of each customer segment.
- ☐ We leverage customer feedback and data to identify opportunities for upselling and cross-selling relevant products.
- ☐ We develop targeted campaigns that highlight the benefits of additional products or service upgrades.
- ☐ We monitor and analyse campaign performance, using metrics such as customer retention rates, upsell conversion rates, and overall revenue impact, to refine our strategies.

RESOURCES

[HubSpot: 22 Examples of Customer Retention Strategies That Actually Work](#)

[Finding The Hidden Upsell And Cross-Sell Opportunities To Drive Growth](#)

[ActiveCampaign: 10 Strategies for Effective Upselling and Cross-Selling](#)



REVENUE OPERATIONS (REVOPS)



Tech Stack

What?

A modern, well-configured go-to-market tech stack is an integrated set of digital tools and platforms designed to streamline marketing, sales, and customer service operations. This tech stack typically includes CRM systems, marketing automation tools, analytics platforms, and customer engagement software, all working seamlessly together to enhance efficiency and effectiveness.

Why?

An integrated tech stack is a must-have for several reasons. It ensures that all your tools and platforms communicate effectively, providing a unified view of customer data. This integration enhances decision-making, improves customer experiences, and increases operational efficiency. A well-configured tech stack supports automation, enabling your team to focus on strategic tasks rather than manual processes. Ultimately, it drives better alignment between sales and marketing, leading to increased revenue and growth.



Checklist

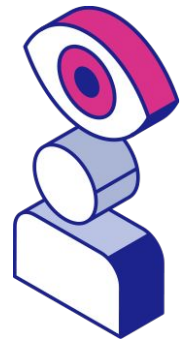
- ☐ We assess our current tools and identify gaps that need to be filled to create a seamless, integrated tech stack.
- ☐ We have platforms that offer robust integration capabilities to ensure smooth data flow across all systems.
- ☐ Our CRM system serves as the central hub for customer data, providing a unified view of interactions.
- ☐ We use marketing automation to streamline campaigns, lead nurturing, and performance tracking.
- ☐ We monitor and optimise our tech stack to keep up with evolving needs and technological advancements.

RESOURCES

[HubSpot: How to Build a Marketing Technology \(Martech\) Stack That'll Grow With You](#)

[Gartner: The CMO's Guide to MarTech](#)

[MarTech: A practical guide to building a marketing technology stack](#)



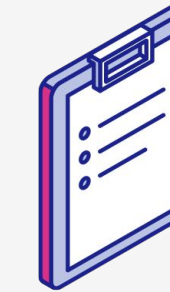
Single View of Customer

What?

A single view of the customer is an integrated approach to managing customer data across all touchpoints, providing a comprehensive and unified profile for each customer. This holistic view combines data from various sources, including sales, marketing, and customer service, enabling businesses to understand and engage with customers more effectively.

Why?

Having a single view of the customer helps deliver personalised experiences and improve customer satisfaction. It ensures that all departments within the organisation have access to the same accurate and up-to-date information, reducing data silos and inconsistencies. This unified perspective allows for better decision-making, targeted marketing efforts, and efficient customer service. Moreover, it enhances predictive analytics, helping businesses anticipate customer needs and preferences, ultimately driving loyalty and increasing revenue.



Checklist

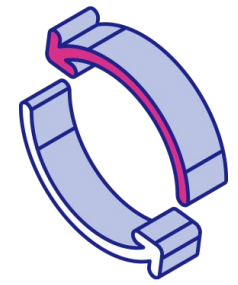
- ☐ We align data across departments to ensure a cohesive approach to customer data management.
- ☐ We select the right technology platforms, such as a robust CRM, to support data integration and accessibility.
- ☐ We have clear ownership of data quality and integration processes.
- ☐ We sort and integrate data from all legacy systems to create a comprehensive customer database.
- ☐ We establish data governance policies to maintain data integrity and security.
- ☐ We test and refine our processes to ensure accuracy and effectiveness.

RESOURCES

[HubSpot: 6 Steps to Build a Single Customer View & Improve Customer Experience](#)

[Forbes: Boost Customer Experience With A Unified Approach](#)

[Gartner: Creating the Single Customer View With Customer Data Integration](#)



Lifecycle Stages

What?

Lifecycle stages refer to the different phases a customer goes through during their relationship with your business. These stages typically include awareness, engagement, conversion, retention, and advocacy. Understanding and managing these stages allows you to tailor interactions and strategies to meet customer needs effectively at each phase.

Why?

By recognising where a customer is in their journey, you can provide relevant content, offers, and support, enhancing their overall experience. This approach helps in building stronger customer relationships, increasing retention rates, and driving revenue growth. Moreover, a well-managed customer lifecycle enables better alignment between marketing, sales, and customer service teams, ensuring a cohesive and efficient customer experience.



Checklist

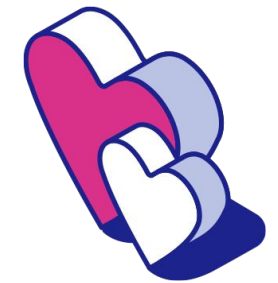
- ☐ We define and document the lifecycle stages relevant to our business, ensuring clarity for all teams involved.
- ☐ We align marketing, sales, and customer service efforts to address the specific needs and goals of customers at each stage.
- ☐ We create targeted content and campaigns tailored to each lifecycle stage, from awareness to advocacy.
- ☐ We track and analyse customer progression through lifecycle stages and identify areas for improvement.
- ☐ We regularly review and update our lifecycle management strategies based on feedback and performance data.

RESOURCES

[HubSpot: Everything You Need to Know about Customer Lifecycle Management](#)

[Forbes: Customer Lifecycle Management \(CLM\): The Ultimate Guide](#)

[Zendesk: Ultimate guide to customer lifecycle management](#)



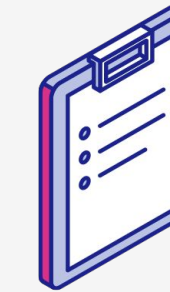
Lead Nurturing

What?

Lead nurturing involves developing relationships with potential customers through personalised and timely communications, guiding them through the buyer's journey. This process typically includes email campaigns, targeted content, and engagement strategies designed to build trust and move prospects closer to a purchasing decision.

Why?

Lead nurturing plays a key role in turning your prospects into loyal customers. Effective lead nurturing strategies ensure that potential leads are engaged and educated about your offerings, addressing their needs and concerns at every stage of the buyer's journey. This approach increases conversion rates, shortens sales cycles, and maximises the return on investment for your marketing efforts.



Checklist

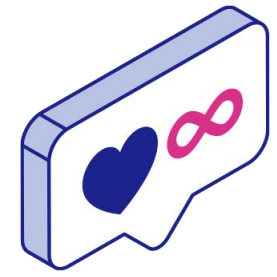
- ☐ We define our audience segments and tailor nurturing strategies to meet their specific needs and behaviours.
- ☐ We create valuable content aligned to stages of the buyer's journey, offering solutions and insights - not sales pitches.
- ☐ We implement multi-channel nurturing tactics, across email, social, and retargeting, to reach leads wherever they are active.
- ☐ We set clear objectives and goals for each nurturing campaign, such as moving leads to the next stage of the funnel or prompting a specific action.
- ☐ We continuously monitor and optimise our lead nurturing efforts based on performance metrics, adjusting strategies to improve engagement and conversions.

RESOURCES

[HubSpot: Lead Nurturing With HubSpot: How to Craft a Killer B2B Campaign Using ...](#)

[Salesforce: Complete Guide to Lead Nurturing](#)

[Marketo: Definitive Guide to Lead Nurturing](#)



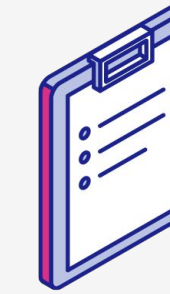
Customer Lifecycle Management

What?

Customer Lifecycle Management (CLM) involves overseeing the various stages of the customer journey, from initial onboarding through to renewal and offboarding. Effective CLM ensures a seamless and satisfying customer experience, maximising customer lifetime value and fostering long-term loyalty. Key components include effective onboarding, proactive renewal strategies, structured offboarding, and comprehensive CRM data integration.

Why?

Managing the customer lifecycle effectively is crucial for retaining customers, increasing customer satisfaction, and driving revenue growth. By providing a smooth onboarding process, proactive renewal management, and structured offboarding, businesses can maintain strong customer relationships and reduce churn. Integrating customer data into a unified CRM system enables personalised interactions and efficient lifecycle management, leading to better customer insights and improved service delivery.



Checklist

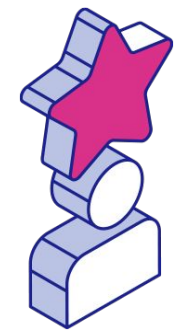
- ☐ Our onboarding process ensures new customers understand how to utilise our products or services effectively from the start.
- ☐ We manage the renewal process proactively, engaging with customers well before their contracts expire.
- ☐ When customers decide to leave, we have a structured offboarding process.
- ☐ We record and update all customer interactions and lifecycle stages in our CRM system.
- ☐ We regularly review and update our CLM strategies based on customer feedback and performance metrics.

RESOURCES

[HubSpot: Everything You Need to Know about Customer Lifecycle Management](#)

[Forbes: Customer Lifecycle Management \(CLM\): The Ultimate Guide](#)

[FreshWorks: Customer Lifecycle Management \(CLM\): A Comprehensive Guide](#)



Lead Scoring

What?

Lead scoring is the process of assigning a value to each lead based on their behaviour and characteristics, helping you prioritise leads that are most likely to convert. This involves using a numerical point system to evaluate various attributes and actions, such as demographic information, engagement with your content, and interaction with your sales team.

Why?

Implementing an effective lead scoring system helps to scale your sales and marketing efforts when you have a high volume of leads. It allows you to identify and prioritise high-quality leads, ensuring that your sales team focuses on prospects with the highest potential for conversion. This targeted approach improves sales efficiency, shortens sales cycles, and increases conversion rates.



Checklist

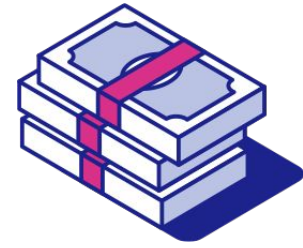
- ☐ We define clear criteria for scoring leads based on their fit (e.g. industry) and behaviour (e.g. content downloads).
- ☐ We have different scoring models for segments, such as new business vs. upsell opportunities, to tailor our approach.
- ☐ We assign point values that reflect relative importance, keeping score ranges manageable and interpretable.
- ☐ We utilise CRM and marketing automation tools to automatically calculate and update lead scores based on real-time data.
- ☐ We monitor our lead scoring model and make adjustments based on feedback from the sales team.

RESOURCES

[Lead Scoring 101: How to Use Data to Calculate a Basic Lead Score](#)

[Adobe: The Definitive Guide to Lead Scoring](#)

[Leadsbridge: Lead scoring best practices: How to create an effective strategy](#)



Attribution

What?

Attribution in marketing refers to the process of identifying and assigning credit to the various marketing touchpoints that lead to a conversion. This involves using different models to determine how much each interaction contributes to the final purchase decision. Common attribution models include first-touch, last-touch, linear, and multi-touch attribution.

Why?

Effective attribution is essential for understanding which marketing efforts are driving results. By accurately attributing conversions to specific channels and touchpoints, businesses can optimise their marketing spend, improve campaign performance, and make data-driven decisions. It helps in identifying the most effective marketing strategies, ensuring resources are allocated to the channels that deliver the highest return on investment.



Checklist

- ☐ We establish clear objectives for our attribution efforts, such as understanding channel performance or improving ROI.
- ☐ We choose the most appropriate attribution model (e.g. first-touch, last-touch, multi-touch) based on our business needs.
- ☐ We use analytics and CRM tools to track and report on attribution data accurately.
- ☐ We implement self-attribution to identify visitors from channels that can't be detected.
- ☐ We monitor attribution reports, analyse the data, and adjust our marketing strategies to optimise performance.

RESOURCES

[Mailchimp: What is Multi-Touch Attribution?](#)

[HubSpot: What Is Marketing Attribution & How Do You Report on It?](#)

[Adobe: Marketing attribution — models and best practices](#)



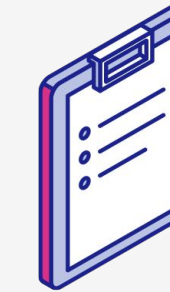
Funnel Reporting

What?

Funnel reporting involves tracking and analysing the progression of leads through various stages of the sales funnel. This type of reporting helps businesses understand where potential customers are in their journey, identify bottlenecks, and measure the effectiveness of their marketing and sales efforts. Funnel reports can include stages such as awareness, interest, decision, and action, providing insights into conversion rates at each stage.

Why?

Funnel reporting is creates visibility and helps you optimise your sales and marketing strategies. By understanding how leads move through the funnel, businesses can identify which stages are performing well and which need improvement. This helps in allocating resources more effectively, improving conversion rates, and ultimately increasing revenue. Funnel reporting also provides visibility into the efficiency of your lead generation and nurturing processes, allowing for data-driven decision-making.



Checklist

- ☐ We define clear stages of our sales and marketing funnel.
- ☐ We use CRM and analytics tools to track and report on lead progression through these stages.
- ☐ We filter data to focus on specific timeframes, lead sources, and segments for more detailed insights.
- ☐ We visualise funnel data to easily identify conversion rates, drop-off points, and areas for improvement.
- ☐ We review and adjust funnel stages and criteria based on data to optimise our sales and marketing efforts.

RESOURCES

[HubSpot: 5 Business Insights You Can Get From A Funnel Report](#)

[Databox: Funnel Reporting: How to Build, Use and Interpret Data from Funnel Report](#)

[Mailchimp: Funnel Reporting: Understand and Visualize Your Customer's Journey](#)



SALES



Process

What?

A sales process is a structured series of steps that sales teams follow to move a prospect from initial contact to a closed deal. This includes clearly defined stages such as lead generation, qualification, proposal, negotiation, and closing. Effective deal management involves tracking and managing opportunities through this process using a CRM system to ensure no opportunity is missed and all leads are nurtured appropriately.

Why?

Implementing a well-defined sales process will improve sales efficiency and effectiveness. It ensures all team members are aligned, reducing confusion and enhancing collaboration between sales, marketing, and other departments. A mapped process helps in identifying bottlenecks, improving forecasting accuracy, and maintaining consistency in how deals are handled. Integrating CRM systems ensures that all customer interactions are recorded and easily accessible, facilitating better communication and more personalised customer experiences.



Checklist

- ☐ We have a mapped and detailed sales process with all critical stages from lead generation to deal closure.
- ☐ We inform relevant stakeholders in designing the sales process to ensure comprehensive input and alignment.
- ☐ We use CRM to manage and track deals, ensuring all customer interactions and deal stages are recorded.
- ☐ We review and update the sales process based on usage to continually improve effectiveness.
- ☐ We provide training and support to our sales team to ensure they are proficient in using CRM tools effectively.

RESOURCES

[HubSpot: The Ultimate Guide to Creating a Sales Process](#)

[Cognism: Sales Process: Close More Deals in 8 Easy Steps!](#)

[HubSpot: The Ultimate Guide to B2B Sales in 2024](#)



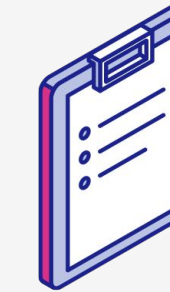
Sales Prospecting

What?

Prospecting is the process of identifying potential customers (prospects) and initiating contact with them to generate new business opportunities. It involves various techniques and tools to find, qualify, and engage leads who are likely to be interested in your products or services. Effective prospecting sets the foundation for a successful sales process.

Why?

Effective prospecting helps maintain a healthy sales pipeline to ensure continuous business growth. By identifying and reaching out to high-potential prospects, sales teams can focus their efforts on leads that are more likely to convert, improving overall sales efficiency and productivity. Consistent prospecting helps in building relationships, understanding customer needs, and establishing trust early in the sales cycle.



Checklist

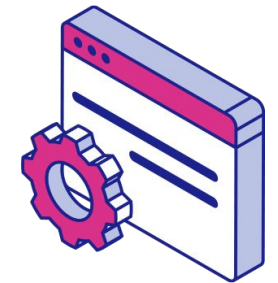
- ☐ We conduct thorough research to understand our ideal customer profile and target market.
- ☐ We personalise outreach by referencing connections, achievements, or relevant content they've interacted with.
- ☐ We use a mix of channels, including emails, phone calls, and social media, to reach prospects where they are most active.
- ☐ We follow an outreach plan with a set number of touchpoints to increase the chances of engagement.
- ☐ We use inbound marketing efforts and existing customer referrals to identify warmer leads.

RESOURCES

[B2B Prospecting: The 11 Best Methods You Should Be Leveraging](#)

[Zendesk: Sales Prospecting: a Beginner's Guide](#)

[Salesforce: Sales Prospecting: How to Find the Right-Fit Customers You're Looking For](#)



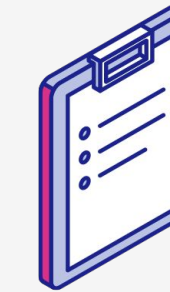
Sales Collateral

What?

Sales collateral refers to the collection of materials and content that sales teams use to support their interactions with prospects and customers. This includes brochures, case studies, whitepapers, product demos, presentations, and more. Sales collateral is designed to provide valuable information, answer questions, and move prospects through the sales funnel effectively.

Why?

Effective sales collateral enhances the credibility of your sales team, provides necessary information to prospects at different stages of the buyer's journey, and supports the overall sales process. Well-crafted sales collateral helps build trust, demonstrate value, and differentiate your offerings from competitors. It ensures that your sales team has the right resources to address prospect concerns and close deals more efficiently.



Checklist

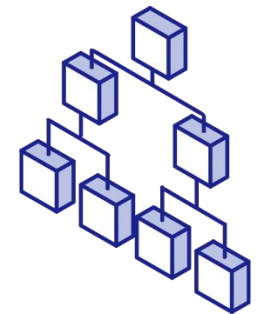
- ☐ We create a variety of sales collateral tailored to different stages of the buyer's journey.
- ☐ We collaborate with marketing to align the content and ensure consistency in messaging and branding.
- ☐ We update our sales collateral to keep it current and reflective of our latest offerings and market conditions.
- ☐ We leverage testimonials and case studies to provide social proof and build trust with prospects.
- ☐ We organise sales collateral in a centralised location, such as a CRM, making it easily accessible.

RESOURCES

[HubSpot: Everything You Need to Know About Sales Collateral](#)

[HighSpot: How to Create Sales Collaterals That Convert](#)

[Zendesk: How to create effective sales collateral \(examples + tips\)](#)



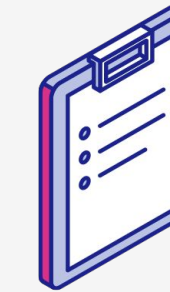
Playbooks

What?

Sales playbooks are comprehensive guides that outline best practices, strategies, and tactics for sales teams to follow during different stages of the sales process. They include information on buyer personas, messaging templates, objection handling, and effective sales techniques. A well-crafted playbook ensures consistency in sales activities and helps sales reps perform more effectively.

Why?

Sales playbooks standardise the sales process, ensuring all team members have access to the same strategies and information. They help new hires ramp up faster, provide consistent customer experiences, and free up valuable time for sales reps to focus on selling rather than creating their own materials. Playbooks also facilitate better training, improve sales effectiveness, and enable the dissemination of successful techniques across the team.



Checklist

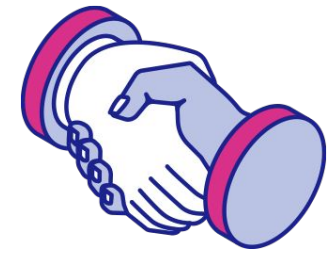
- ☐ We review and update our sales process regularly to ensure it aligns with current goals and market conditions.
- ☐ We outline clear goals for sales playbooks, focusing on areas where reps need the most guidance and support.
- ☐ We involve key stakeholders, including reps, managers, and marketing, in the creation of playbooks.
- ☐ We create interactive playbooks (e.g. with question-and-answer boxes), to engage reps and simplify process.
- ☐ We provide training and updates to ensure playbooks remain relevant and useful.

RESOURCES

[HubSpot: 7 Sales Playbooks to Help You Score in the Final Quarter](#)

[Pipedrive: The ultimate guide to creating your sales playbook](#)

[Salesforce: The Ultimate Sales Playbook: How to Create Your Own with Examples for Success](#)



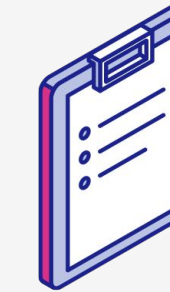
Deal Management

What?

Deal management is the process of organising, tracking, maintaining, and analysing sales deals as they progress through the sales pipeline. This involves using tools and strategies to prioritise deals, automate sales tasks, and ensure consistent communication and collaboration among sales teams.

Why?

Effective deal management improves sales efficiency and increases conversion rates. By systematically managing deals, you can create accurate sales forecasts, maintain strong sales pipelines, and maximise revenue by prioritising the most promising deals. Additionally, deal management helps in identifying which deals are most likely to convert, thus focusing efforts where they are most impactful. Consistent and clear communication throughout the sales process, facilitated by deal management tools, ensures that sales teams are aligned and can better understand and meet customer needs.



Checklist

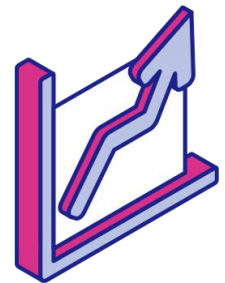
- ☐ We have a clear and structured sales process that includes all critical stages from lead generation to deal closure.
- ☐ We have a CRM to manage and track deals, ensuring all customer interactions and deal stages are recorded.
- ☐ We review and update the deal management process to continually improve efficiency.
- ☐ We prioritise deals based on their likelihood of conversion and potential revenue.
- ☐ We provide training to our sales team to ensure they are proficient in using the sales process and CRM tools effectively.

RESOURCES

[HubSpot: What Is Deal Management and How It Can Help Reps Close More Deals](#)

[Zendesk: How to build a sales pipeline \(and why you should\)](#)

[Outreach: 11 best practices of sales pipeline management](#)



Sales Forecasting

What?

Sales forecasting is the process of predicting future sales performance based on historical data, market analysis, and sales trends. It involves estimating what a salesperson, team, or company will sell within a specific period, such as weekly, monthly, quarterly, or annually. Various methods can be employed, including qualitative and quantitative approaches, to create accurate forecasts.

Why?

Effective sales forecasting helps you make informed business decisions. Accurate forecasts enable you to plan for the future, allocate resources efficiently, set realistic sales targets, and manage cash flow. Forecasting also helps in identifying potential market opportunities and risks, improving overall strategic planning and operational efficiency.



Checklist

- ☐ We use historical data as a foundation for our sales forecasts, ensuring it is clean and consistently updated.
- ☐ We choose the most appropriate forecasting model for our needs, whether opportunity stage, length of sales cycle, or regression analysis.
- ☐ We implement a sales pipeline action plan to ensure we have a steady flow of well-qualified leads to support our forecasts.
- ☐ We regularly review and adjust our forecasting methods to incorporate new data and market trends.
- ☐ We encourage collaboration between departments to ensure forecasts are aligned with overall business goals.

RESOURCES

[HubSpot: The Ultimate Guide to Sales Forecasting](#)

[Salesforce: The Complete Guide to Building a Sales Forecast](#)

[Outreach: 9 proven sales forecasting methods to predict revenue](#)



WEBSITE



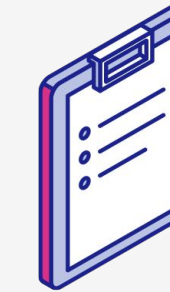
Technical Foundations

What?

Technical foundations for a website involve the critical behind-the-scenes elements that ensure your site is efficient, secure, and easily accessible to users and search engines. This includes aspects like site architecture, mobile optimisation, page speed, SSL implementation, and proper indexing.

Why?

Strong technical foundations help to deliver a better user experience and achieve high search engine rankings. Proper technical optimisation ensures that your content is accessible, loads quickly, and provides a secure environment for users. It helps in preventing issues that can harm your site's visibility and performance, such as slow load times, broken links, and security vulnerabilities. Effective technical foundations also support better SEO practices, leading to increased organic traffic and improved user engagement.



Checklist

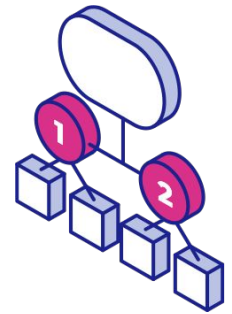
- ☐ We have a clear site architecture that's easy for users and search engines to navigate.
- ☐ We optimise our website for mobile devices, ensuring it is responsive and provides a smooth experience across screen sizes.
- ☐ We improve page speed by using techniques such as image compression, reducing redirects, and using caching.
- ☐ We secure our website with SSL certificates to protect user data and boost search engine rankings.
- ☐ We regularly conduct technical SEO audits to identify and fix issues that may affect our site's performance and visibility.

RESOURCES

[SEJ: Google PageSpeed Insights Reports: A Technical Guide](#)

[HubSpot: The Ultimate Guide to Web Hosting](#)

[G2: Your Comprehensive Guide to Technical SEO](#)



Information Architecture

What?

Information architecture (IA) involves the organisation and structuring of content on a website to ensure users can easily find the information they need. This includes the design of navigation systems, categorisation of information, and labelling of content. Effective IA creates a logical framework that enhances user experience and supports efficient content discovery.

Why?

A well-planned information architecture significantly enhances user experience by making navigation intuitive and content easy to find. Proper IA reduces cognitive load, helping users process information efficiently without feeling overwhelmed. Additionally, strong IA supports SEO by creating a clear site structure that search engines can easily crawl and index, ultimately improving site visibility and engagement.



Checklist

- ☐ We create a simple top-level navigation menu that is straightforward and user-friendly.
- ☐ We implement the pillar-cluster model to organise content and enhance internal linking.
- ☐ We use consistent and familiar labelling for navigation and content categories.
- ☐ We keep URLs simple and indicative of the content they represent.
- ☐ We provide breadcrumb navigation to help users understand their location within the site and navigate easily.

RESOURCES

[HubSpot: What is Website Architecture? 8 Easy Ways to Improve Your Site Structuring](#)
[UX Booth: Complete Beginner's Guide to Information Architecture](#)
[NNG: Information Architecture: Study Guide](#)



Design and Usability

What?

Website design and usability focus on creating a visually appealing and user-friendly interface that ensures visitors can easily navigate, understand, and interact with your content. This involves elements such as simplicity, visual hierarchy, consistency, responsiveness, and accessibility, all aimed at enhancing the overall user experience (UX).

Why?

Effective design and usability are crucial for retaining visitors, reducing bounce rates, and increasing conversions. A well-designed website builds trust and credibility, ensuring that users find it easy to locate the information they need and complete desired actions. Usability improvements can lead to better engagement, higher customer satisfaction, and ultimately, more business opportunities.



Checklist

- ❑ We keep the design simple and uncluttered, using a limited colour palette and legible typefaces to ensure clarity.
- ❑ We implement a clear visual hierarchy to guide users to the most important elements first, using size, colour, and placement to draw attention.
- ❑ We ensure consistency in design, such as navigation, fonts, and colours, across all pages to provide a cohesive experience.
- ❑ We optimise for responsiveness, ensuring the site works seamlessly across all devices and screen sizes.
- ❑ We prioritise accessibility, making sure the site is usable for people with disabilities.

RESOURCES

[9 Guidelines & Best Practices for Exceptional Web Design and Usability](#)

[Baymard Institute: The Best Practices and Key Principles of UX Design](#)

[UX Design Institute: User interface guidelines: 10 essential rules to follow](#)



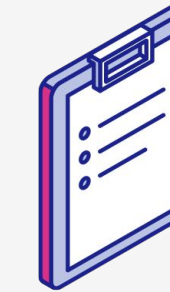
Calls to Action (CTAs)

What?

Calls to Action (CTAs) are prompts on your website that guide users towards taking specific actions, such as signing up for a newsletter, downloading a whitepaper, or making a purchase. CTAs are essential components that drive user engagement and conversions by directing visitors to perform desired actions that align with your business goals.

Why?

Effective CTAs convert website traffic into leads and customers. They provide clear instructions and motivation for users to take the next step in their journey with your brand. Well-designed CTAs improve user experience, increase conversion rates, and ultimately contribute to achieving your business objectives by turning passive visitors into active participants.



Checklist

- ☐ We strategically place CTAs where users are most likely to engage with them, e.g. the end of blogs, landing pages, and product pages.
- ☐ We ensure our CTAs are clear and concise, using actionable language that tells users exactly what to do.
- ☐ We make our CTAs stand out with contrasting colours, bold fonts, and eye-catching design elements that draw attention.
- ☐ We clearly communicate the benefit of taking the action. Users should understand what they will gain by clicking on the CTA.
- ☐ We regularly A/B test different versions of our CTAs to determine which designs, placements, and messages perform best.

RESOURCES

[HubSpot: The Complete Checklist for Creating Compelling Calls-to-Action](#)

[Neil Patel: 16 Call-to-Action Formulas That Make People Want to Click](#)

[Unbounce: CTA This. The 10 Best Resources to Improve Your Call-To-Action](#)



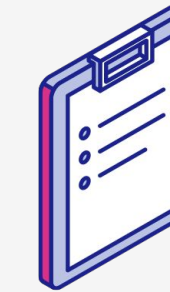
Forms & Funnels

What?

Forms and funnels are core components of your website that capture visitor information and guide them through the conversion process. Forms are used to collect user data, such as contact details and preferences, while funnels are structured paths that lead users from initial interest to a final action, like making a purchase or signing up for a service.

Why?

Optimising forms and funnels improves user experience and increases conversion rates. Well-designed forms make it easy for visitors to provide information, while effective funnels ensure that users are smoothly guided through the stages of your marketing and sales process. This alignment can significantly enhance lead generation and customer acquisition efforts.



Checklist

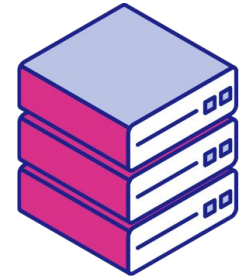
- ☐ We keep forms simple and only ask for essential information to reduce friction and increase completion rates.
- ☐ We use clear and compelling headlines and instructions to guide users through the form submission process.
- ☐ We implement multi-step forms for complex data collection, breaking down the process into manageable steps.
- ☐ We ensure that our forms are mobile-friendly and responsive, providing a seamless experience across all devices.
- ☐ We use thank-you pages and follow-up emails to acknowledge submissions and provide next steps.

RESOURCES

[Gartner: Lead Generation Forms Best Practices: Create Forms that Convert](#)

[Lusha: Top 10 Best Converting Lead Generation Forms](#)

[Outbrain: 8 Ways to Create High Performance Lead Forms](#)



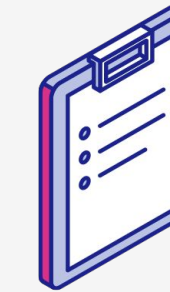
Technical SEO

What?

Technical SEO involves optimising the technical aspects of your website to improve its search engine ranking. This includes elements such as site speed, mobile friendliness, crawlability, indexing, and overall site architecture. Technical SEO ensures that search engines can easily access, crawl, and index your website, which is crucial for visibility and ranking in search engine results pages (SERPs).

Why?

Technical SEO is the foundation of a successful SEO strategy. Without it, even the best content can go unnoticed by search engines. Ensuring your website is technically sound helps improve user experience, reduces bounce rates, and enhances your site's performance. This leads to better search engine rankings, increased organic traffic, and higher conversion rates.



Checklist

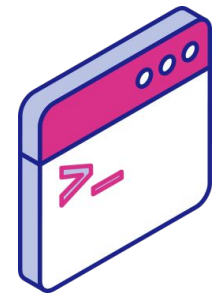
- ☐ Our website has a fast loading speed by optimising images, browser caching, and using a content delivery network (CDN).
- ☐ We make sure our website is mobile-friendly and responsive, providing an excellent user experience across all devices.
- ☐ We create and submit an XML sitemap to search engines to help them understand the structure of our site.
- ☐ We implement HTTPS to ensure our website is secure, which is a ranking factor for search engines.
- ☐ We check and fix any crawl errors in Google Search Console to ensure all pages are accessible to search engines.

RESOURCES

[Moz: The Beginner's Guide to Technical SEO](#)

[Ahrefs: The Beginner's Guide to Technical SEO](#)

[Google: SEO Starter Guide](#)



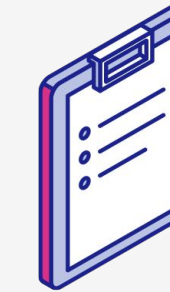
On-Page SEO

What?

On-Page SEO involves optimising individual web pages to rank higher and attract more relevant traffic from search engines. This includes fine-tuning both the content and the HTML source code of a page. Key components of on-page SEO include meta tags, headings, URL structure, internal links, and the strategic use of keywords within the content.

Why?

On-Page SEO makes your content comprehensible to search engines and relevant to search queries. It helps search engines understand your page's content and assess its relevance to specific search terms. Well-optimised pages are more likely to rank higher in search results, drive organic traffic, and offer a better user experience.



Checklist

- ☐ We conduct thorough keyword research to identify relevant keywords and phrases for each page.
- ☐ We optimise title tags and meta descriptions with target keywords.
- ☐ We use header tags (H1, H2, H3, etc.) to structure content hierarchically and include keywords naturally.
- ☐ We ensure URLs are clean, descriptive, and include target keywords.
- ☐ We incorporate internal linking to connect related content and help search engines understand the structure of our site.

RESOURCES

[Yoast: The Ultimate Guide to On-Page SEO](#)

[Moz: On-Page Ranking Factors](#)

[SEMRush: On-Page SEO: What It Is and How to Do It](#)



Domain Authority

What?

Domain Authority (DA) is a search engine ranking score that predicts how well a website will rank on search engine result pages (SERPs). Developed by Moz, this metric scores a website on a scale from 1 to 100, with higher scores corresponding to a greater ability to rank. Key factors influencing DA include the number and quality of inbound links, the overall SEO performance of the site, and the quality of content.

Why?

Improving Domain Authority increases your website's visibility and credibility in search engines. A higher DA can lead to better rankings, more organic traffic, and greater trust from users and potential customers. By focusing on activities that boost your DA, you enhance your website's overall search engine performance.



Checklist

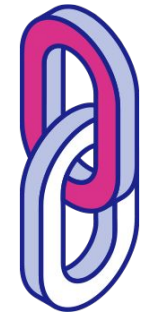
- ☐ We create high-quality, valuable content that attracts natural inbound links from authoritative sites.
- ☐ We engage in link-building activities to acquire high-quality backlinks from relevant and reputable websites.
- ☐ We regularly audit and remove any harmful or spammy backlinks that could negatively impact our DA.
- ☐ We maintain a robust internal linking structure to distribute link equity throughout our site.
- ☐ We ensure our website is technically sound, with a focus on site speed, and mobile-friendliness, and security.

RESOURCES

[Moz: What is Domain Authority?](#)

[Ahrefs: How to Increase Website Authority \(Domain Rating\)](#)

[Search Engine Journal: Link Building for SEO: A Complete Guide](#)



Backlinks

What?

Backlinks, also known as inbound or incoming links, are links from other websites that point to your site. They are a key element of SEO, as search engines use them as indicators of a website's authority and relevance. High-quality backlinks from reputable sites can significantly improve your search engine rankings and drive organic traffic.

Why?

Backlinks enhance your website's visibility and credibility. They signal to search engines that your content is valuable and trustworthy. The more high-quality backlinks you have, the more authoritative your site appears, which can lead to higher rankings in search engine results pages (SERPs). Additionally, backlinks can drive direct referral traffic to your site from other sources.



Checklist

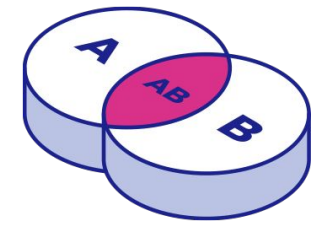
- ☐ We create high-quality, shareable content that naturally attracts backlinks from authoritative sites.
- ☐ We engage in guest blogging and contribute valuable content to reputable industry blogs and websites.
- ☐ We participate in relevant online communities and forums, providing insights and linking back to our content.
- ☐ We conduct regular backlink audits to identify and disavow any harmful or spammy links.
- ☐ We build relationships with industry influencers and partners to encourage backlinks from their websites.

RESOURCES

[Ahrefs: Link Building for SEO: The Beginner's Guide](#)

[Moz: The Beginner's Guide to Link Building](#)

[Backlinko: What are Backlinks?](#)



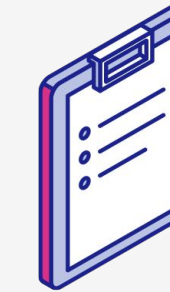
Iterative Improvement

What?

Iterative improvement is an ongoing process of making incremental changes and enhancements to your website based on data-driven insights. This approach involves testing, analysing, and optimising various elements of your site to improve performance, user experience, and conversion rates. Additionally, having a clear vision and plan for your website ensures it stays current and relevant from a marketing perspective.

Why?

Websites should not be static - to get results they require constant refinement to adapt to changing user behaviours, market trends, and technological advancements. By regularly implementing iterative improvements, you can ensure your website remains effective, competitive, and aligned with your business goals. This process helps identify and fix issues, optimise user journeys, and enhance overall site performance. Moreover, maintaining a clear vision and keeping your website updated with accurate and strategic marketing information is crucial for sustained growth.



Checklist

- ☐ We review and analyse website analytics to identify areas for improvement.
- ☐ We conduct A/B testing on key pages and elements to determine what changes yield the best results.
- ☐ We gather user feedback through surveys, usability testing, and direct interactions to understand user needs and pain points.
- ☐ We implement changes incrementally and monitor impact, ensuring that each adjustment positively contributes to overall performance.
- ☐ We maintain a clear vision and strategic plan for our website, ensuring it is up-to-date with and aligned with our business goals.

RESOURCES

[Smartsheet: The Power of Iterative Design and Process](#)

[HubSpot: Introduction to Growth-Driven Design](#)

[HubSpot: Phases of Website Redesign: The Ultimate Guide for Marketers](#)

Thank you for reading

The Ultimate B2B Growth Strategy Checklist

By following the checklists outlined in this guide, you're setting your B2B business up for long-term success. Remember, Connected Growth is only possible when the all Go-To-Market aspects of your business are working together in harmony. Revisit this checklist periodically and refine your strategies to keep building the momentum.

If you have any feedback, questions, or would like Digital Litmus to help your business, please don't hesitate to reach out to me directly.

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