

# THE MARKETER'S CHECKLIST

GET YOUR TEAM  
READY FOR 2024!



## 1. PULL INSIGHTS

### Programs and campaigns

- ☐ Analyze which programs & messaging performed best for awareness, demand and retention
- ☐ Review your ideal customer profiles based on high-value pipeline and revenue generated
- ☐ Review and update top personas
- ☐ Identify channel partnerships with best ROI

### Tactics

- ☐ Which digital channels, sponsorships, vendors, events delivered value & performed to set KPIs
- ☐ What BDR outreach/cadence drove engagement
- ☐ What email subject lines, templates and day/time generated the best results
- ☐ Which creative and themes drew the most awareness
- ☐ What assets drove the most page views and/or conversion
- ☐ Identify any content gaps to fill

### KPIs

- ☐ Were 2023 KPIs accurate in measuring tactical effectiveness?
- ☐ Are results easy and quick to pull from existing martech stack?
- ☐ Review any survey that was launched and which to consider for the future?

### Operations

- ☐ Are marketing workflows (for content development, events, approvals, etc...) efficient?
- ☐ Could marketing automation processes (including lead/opportunity qualification) be optimized?
- ☐ Are dashboards easy to use, complete and accurate in pulling results?

## 2. GET FORESIGHT

### Market

- ☐ Review analyst research, reports and news for market outlook and trends
- ☐ Brainstorm with sales and customer success teams to identify improvements and new ideas
- ☐ Get input from top customers and partners on your offerings

### Competition

- ☐ Review key competitors' websites to understand positioning and offerings. Get on their distribution lists
- ☐ Get to know emerging competitors
- ☐ Review product map, positioning and messaging

### Innovation

- ☐ Identify new martech solutions to improve your stack. Sign up for demos/trials
- ☐ Research and review new promotional vendors, sponsorships and events to consider
- ☐ Identify new digital channels, media and formats to test
- ☐ Brainstorm on new campaign themes, creative and messaging

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### 3. START SPRING WINTER CLEANING

#### Content

- ☐ Update your internal content inventory
- ☐ Refresh or retire old case studies, assets and ads
- ☐ Review and update as needed content used in nurtures, next-up assets, on website and landing pages
- ☐ Retire old low-performing content and campaign landing pages

#### Operations

- ☐ Update and optimize campaign nomenclature
- ☐ Update segments in marketing automation tools
- ☐ Optimize and refresh reports and dashboards

#### Campaigns and events

- ☐ Sign up now for critical sponsorships to receive best value and early bird pricing
- ☐ Check on (and organize) swag inventory
- ☐ Plan to order anything that can be purchased in bulk
- ☐ Assess and refresh event booth and tabletop properties and equipment

#### Budget

- ☐ Ensure all invoices are in and accruals reflected
- ☐ Review and optimize the process for managing and reporting on payments and budget
- ☐ Review 2024 budget, allocate “buckets” to different owners (as needed)

#### Other

- ☐ Renew or cancel subscriptions to tools, sponsorships, services and more
- ☐ Update marketing templates (for campaigns, QBRs, etc)
- ☐ Review methods and cadences for internal communications and reporting

### 4. PLAN + ACTION

#### Strategy and planning

- ☐ Align goals and objectives to corporate strategy
- ☐ Set marketing priorities and targets. Validate with stakeholders.
- ☐ Align tactics to support the marketing priorities
- ☐ Set tactical KPIs and reports/dashboards
- ☐ Develop the overarching marketing plan for the year and detailed plans for 1st quarter

#### Program timelines

- ☐ Identify dates for key launches and announcement
- ☐ Schedule in upcoming customer, partner and industry events as well as award submissions
- ☐ Pencil in analyst pitches and assessments
- ☐ Document 1Q programs and campaigns

### 5. COLLABORATE + COMMUNICATE

- ☐ Present goals and plans to all key stakeholders
- ☐ Schedule your communications and reporting: sales updates, yearly kick off, QBRs, etc
- ☐ Share regular updates via broader distribution
- ☐ **Involve your marketing team and stakeholders throughout this review/planning process for their input and buy in!**

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