

Marketing Triage Toolkit



Introduction

Welcome to the **Marketing Triage Toolkit**. This resource is designed to help businesses evaluate and optimize their marketing efforts across multiple channels. Whether you're a small business or a more established company, this toolkit provides **actionable steps** to enhance your online presence, improve customer engagement, and drive conversions. Each section offers a checklist of **essential marketing activities** and **free or low-cost tools** to help you analyze and improve your strategy efficiently.

By **following the checklists** and recommendations, you'll be equipped to tackle everything from business strategy and SEO to content marketing and paid advertising. The goal is to **empower you** with clear steps and practical tools that will support your growth and success.

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1. Business Overview, Strategy & Competitor SWOT

Objective:

- Understand the business's phase, key revenue streams, growth opportunities, challenges, and competitive landscape.

Checklist:

- Have I identified the key revenue drivers and growth opportunities?
- Do I understand the current business phase (startup, growth, mature, etc.)?
- Have I analyzed the key competitors and their SWOT (Strengths, Weaknesses, Opportunities, Threats)?
- Are there any market gaps or competitive threats to address?

Tools: [ChatGPT](#), [SimilarWeb](#), [SpyFu](#), [Crunchbase](#)

Call-to-Action (CTA): Now that you've identified market gaps and competitor strengths, develop an actionable strategic plan. Focus on improving product offerings, adjusting pricing strategies, or exploring new markets to capitalize on the opportunities identified in your SWOT analysis.

2. Website & Professional Branding Audit

Objective:

- Ensure the business's online presence and communication channels—such as email, phone, and physical address—are professional, cohesive, and optimized for user experience.

Checklist:

- Does the business have a professional, domain-based email(s) (e.g., yourname@yourdomain.com, info@yourdomain.com), a dedicated business phone number and a physical address or virtual mailbox to enhance professionalism and credibility?
- Can users tell what the business does within 3 seconds of visiting the site?
- Is there a clear call-to-action (CTA) and value proposition on the homepage?

- Is contact information on the website, including professional email, phone number, and physical address, easy to find?
- Is the site mobile-friendly, fast-loading, and optimized for user experience?

Tools: [Siteliner](#), [Google's PageSpeed Insights](#), [Screaming Frog](#), [GTMetrix](#)

CTA: Address the most pressing issues identified during your audit, such as improving site speed, ensuring mobile responsiveness, and refining your call-to-action buttons to improve conversions. Also, ensure the business is using professional branding elements (e.g., professional emails, business phone number, and physical/virtual address) to elevate credibility. Prioritize fixes that will enhance user experience and SEO rankings.

3. SEO Positioning

Objective:

- Ensure the website is discoverable through search engines and optimized for relevant keywords.

Checklist:

- Have I conducted keyword research to identify relevant terms?
- Is the content optimized for search engines (meta tags, headings, etc.)?
- Does each product or service have its own dedicated page to target specific keywords and improve search visibility?
- Have I assessed backlinks and technical SEO aspects?

Tools: [Google Search Console](#), [Ahrefs Free Webmaster Tools](#), [Google Ads Keyword Planner](#), [SEMRush](#), [Ubersuggest](#), [Moz Domain Analysis](#)

CTA: After completing the SEO audit, initiate an on-page optimization strategy by updating your top-performing pages with fresh, keyword-rich content and refining meta tags to improve visibility. Ensure that each service or product has its own dedicated page optimized for relevant keywords. Regularly update the blog with SEO-optimized, keyword-rich content to capture search traffic and improve the site's authority.

4. Local SEO & Directories

Objective:

- Strengthen local presence and reputation through reviews and directory listings.

Checklist:

- Is the business listed on key directories (Google Business Profile, Yelp, Angie's List, etc)?
- Are the NAP (Name, Address, Phone) details consistent across all listings?
- Is there a sufficient # of reviews across multiple platforms?
- Have I developed a strategy for gathering and managing reviews?
- Am I regularly monitoring listings and responding to reviews?

Tools: [Moz Local Listing Score](#), [Google Business Profile](#), [Yelp for Business](#), [Angi](#)

CTA: Encourage recent customers to leave Google Business Profile reviews, and make sure your NAP (Name, Address, Phone) is consistent across all directories. Regularly monitor and respond to reviews to build trust and improve local search rankings.

5. House Data and Direct Marketing

Objective:

- Leverage existing customer and lead data for email and direct mail campaigns, assess database size and opportunities for retention.

Checklist:

- Have I assessed the client's database of leads and customers, and is it housed in a CRM for easy access and management?
- Is there an active email marketing strategy in place to engage leads and customers?
- Have I explored opportunities for direct mail campaigns to reach segments not engaging via email?
- Are email and direct mail campaigns being regularly tracked for performance (email: open rates, click-through rates, ROI. Direct mail: pQR/pURL tracking, matchback analysis)?

Tools: [Mailchimp](#), [Postalytics](#), [Hubspot Free CRM](#), [Google Analytics](#)

CTA: Segment your existing database into customer groups (e.g., active leads, repeat customers), and launch a personalized email campaign. Tailor messaging based on customer behavior and track open and conversion rates to refine future campaigns.

6. Referral Program & Word-of-Mouth Marketing

Objective:

- Encourage customer referrals, showcase positive feedback, and build word-of-mouth marketing through reviews and testimonials.

Checklist:

- Is there an active referral program with clear, double-sided incentives to encourage word-of-mouth promotion?
- Have I created a Reviews or Testimonials page to feature positive feedback and encourage reviews across multiple platforms?
- Are there easy-to-find links or buttons for customers to leave reviews on Google Business Profile, Facebook, Yelp, etc.?
- Are customer testimonials, case studies, or social proof being shared in marketing channels (e.g., website, email, social media)?
- Have I implemented a strategy to request feedback and reviews after customer interactions?
- Am I following Google Business Profile's guidelines by avoiding incentives for reviews to prevent penalties?

Tools: Customer Feedback Surveys ([Google Forms](#), [Survey Monkey](#)), [Google Business Profile](#), [Facebook Reviews](#), [Yelp for Business](#)

7. Content Marketing & Lead Hooks

Objective:

- Use valuable content to attract and engage potential customers and capture leads through lead magnets.

Checklist:

- Have I developed a content calendar with topics that resonate with the target audience and are optimized for SEO?
- Have I used a tool(s) to find high-performing content ideas and keywords?
- Are lead hooks/magnets (e.g., guides, quizzes, gated content) in place to capture potential customers' information?

- Is there a clear path from content to conversion (e.g., CTAs, landing pages)?
- Am I sharing content via email marketing, my social channels, and Google Business Profile to maximize reach?
- Am I regularly tracking content performance (e.g., engagement, shares, conversions) to refine the strategy?

Tools: [UberSuggest](#), [BuzzSumo](#), [AnswerThePublic](#)

CTA: After developing your content calendar, create lead magnets like guides or quizzes to capture potential customers' information. Ensure each piece of content has a clear call-to-action leading to a landing page or contact form.

8. Target Audience, Acquisition Strategy & Industry Opportunities

Objective:

- Define the target audience (B2B, B2C, or both), assess acquisition channels, and explore partnerships with industry associations or aggregators to enhance visibility and lead generation.

Checklist:

- Have I clearly identified the target audience (B2B, B2C, or both) and properly segmented them?
- Have I analyzed customer demographics and behaviors to tailor my messaging and outreach?
- Are there any aggregator platforms or industry associations that can boost visibility?
- Have I explored partnerships or industry associations that offer opportunities for lead generation and credibility?
- Am I utilizing the right acquisition channels (e.g., email, direct mail, search, social media, referral programs, etc) to reach my target audience?

Tools: [Census Business Builder \(CBB\)](#), [Facebook Audience Insights](#), [Google Ads Audience Insights](#), [Apollo.io \(b2b only\)](#)

9. Social Media Presence

Objective:

- Audit and optimize the client's social media presence for engagement, growth, and consistency.

Checklist:

- Are the social media accounts actively engaging with followers through comments, replies, and messages?
- Is there a strategy for regular posting, including a content calendar for varied content (e.g., promotional, educational, interactive)?
- Have I reviewed engagement rates (likes, comments, shares) and follower growth over time?
- Are there opportunities for running social media campaigns or collaborating with influencers?
- Am I tracking content performance to understand what resonates most with the audience?
- Is the client using the right platforms for their audience (e.g., LinkedIn for B2B, Instagram for B2C)?

Tools: [Hootsuite Free](#), [Social Blade](#), [Facebook Insights](#), [Instagram Insights](#), [Google Analytics](#)

10. Analytics & Tracking Setup

Objective:

- Ensure all marketing activities are tracked for performance evaluation and optimization.

Checklist:

- Are tracking tools and conversion tracking properly set up across all channels?
- Am I tracking key performance metrics across all marketing channels (e.g., organic, social, email)?
- Is there a process in place for regularly analyzing data and making adjustments based on performance?
- Have I implemented conversion tracking for lead generation and sales?

Tools: [Google Tag Manager](#), [Google Analytics](#), [Hotjar](#), [Microsoft Clarity](#)

Foundational Marketing:

Everything discussed in **previous sections** (website, search, content, direct marketing, social media, and analytics) forms the **foundation** of your marketing strategy. Paid advertising should be the final step, only after these foundational elements are solid and producing consistent results.

11. Paid Advertising (Advanced)

Objective:

- Scale marketing efforts through paid ads once foundational marketing is strong.

Checklist:

- Is the business ready for paid search ads (Google Ads, Bing Ads) to target high-intent keywords?
- Have I optimized search ad campaigns for ROI and cost-per-acquisition before expanding to other channels?
- Is there a plan to scale into paid social ads (Facebook, Instagram, LinkedIn) to engage users on social platforms?
- Am I utilizing remarketing through Google Ads or other channels to re-engage past visitors?
- Have I considered paid advertising partnerships or sponsorship opportunities within relevant industry platforms (e.g., Yelp, Angie's List, industry-specific directories) to reach niche audiences?
- Are conversion tracking and performance metrics set up to monitor ads across all channels?
- Have I set and scaled an ad budget based on performance and profitability across different platforms?

Tools: [Google Ads](#), [Facebook/Meta Ads Manager](#), [LinkedIn Ads \(b2b only\)](#), [Yelp for Business](#), [Angi](#), [UberSuggest](#), [Google Analytics](#)

CTA: Review your paid advertising performance and reallocate budget to the highest-performing channels (e.g., Google Ads, Facebook Ads). Implement A/B testing on your ads to refine your copy and visuals and focus on scaling ads in channels with the best ROI.

