Digital marketing checklist

Print this, work down it, and tick what is genuinely done -- not what is merely set up.

> *Work top to bottom. Setup and measurement come before channels on purpose: running paid or social before measurement works means you will not be able to tell whether any of it paid off.*

Setup and foundations

- [ ] Define the one business outcome marketing is responsible for this quarter
- [ ] Write down who you are selling to in a sentence a stranger would understand
- [ ] Confirm who owns each channel by name
- [ ] Agree the budget and the reporting date
- [ ] List the three competitors you will actually look at

Website

- [ ] Every page loads over HTTPS on one canonical hostname
- [ ] Homepage states what you do, for whom, and the next step
- [ ] Primary conversion action is visible without scrolling on mobile
- [ ] Contact details and business information are easy to find
- [ ] Forms work and someone receives the submissions
- [ ] Site is usable on a mid-range phone on a slow connection
- [ ] A 404 page exists and points somewhere useful

Measurement

- [ ] Analytics installed and firing once per page
- [ ] Conversions defined as events, not just page views
- [ ] Internal and agency traffic excluded
- [ ] Google Search Console verified and sitemap submitted
- [ ] Bing Webmaster Tools verified
- [ ] One written UTM convention agreed and used
- [ ] A named person checks the numbers monthly

Search

- [ ] Each priority page targets one clear search intent
- [ ] Title tags and meta descriptions unique and written for the query
- [ ] One H1 per page that matches what the page delivers
- [ ] Internal links point to commercially important pages
- [ ] Images that carry meaning have descriptive alt text

- [ ] Content has a visible author and an accurate updated date
- [ ] Top pages reviewed and refreshed at least twice a year

Paid media

- [ ] Break-even CPA or ROAS calculated before launching
- [ ] Conversion tracking verified against analytics
- [ ] Landing page matches the ad promise
- [ ] Negative keyword or audience exclusion list in place
- [ ] Search term and placement reports reviewed monthly
- [ ] Budget reallocated based on measured cost per outcome

Email

- [ ] Sign-up offers a specific reason to subscribe
- [ ] Consent is explicit and recorded
- [ ] SPF, DKIM and DMARC configured
- [ ] Welcome sequence runs automatically
- [ ] Every send has one primary call to action
- [ ] Unsubscribes are honoured immediately

Social

- [ ] Only the channels you can sustain are active
- [ ] Profile, bio and link are current
- [ ] A response process exists for comments and messages
- [ ] Each channel has a stated purpose

Reporting

- [ ] Report goes to a named person on a fixed date
- [ ] Report includes commentary, not only numbers
- [ ] Each report ends with next actions and owners
- [ ] Last month's actions were completed or formally dropped

When you have finished

Count the unticked boxes by group. Fix the group with the most gaps before starting anything new -- adding a channel on top of broken measurement multiplies the problem rather than the results.

Taking on a new client

A different question from the checklist above: not "is this set up correctly" but "do I have what I need to start". Work through this before the first invoice, not after the first problem.

Access and accounts

- [ ] Analytics access granted at the right permission level, in their account not yours
- [ ] Google Search Console access, or a new property verified
- [ ] Ad account access via a manager account, never shared logins
- [ ] CMS or website admin access, with a named technical contact
- [ ] Email platform and CRM access
- [ ] Domain registrar and DNS access confirmed to exist somewhere findable
- [ ] Access recorded in one place so it survives a staff change

Commercial and legal

- [ ] Signed contract or scope document, not just an accepted proposal
- [ ] Purchase order or billing contact confirmed
- [ ] Who pays the ad platforms directly, agreed in writing
- [ ] Notice period and term dates recorded in your own calendar
- [ ] Data processing terms in place if you handle personal data

Baseline before you change anything

- [ ] Export current analytics for the last 12 months
- [ ] Screenshot or export current rankings and paid performance
- [ ] Record the current conversion count and cost per outcome
- [ ] Note the date you took the baseline
- [ ] Confirm with the client which number you will both judge success on

People and process

- [ ] Named decision-maker who can approve work
- [ ] Agreed approval turnaround in working days
- [ ] Reporting date and format agreed
- [ ] Communication channel agreed, with an escalation route
- [ ] Kick-off call held and the first 30 days written down

Brand and assets

- [ ] Logo files, brand colours and fonts received
- [ ] Tone of voice guidance, or three examples they consider on-brand

- [ ] Product or service list with current pricing
- [ ] Who is allowed to be quoted, and what cannot be said publicly
- [ ] Existing creative assets and where they are stored

> *The baseline section is the one people skip. If you change anything before recording where the account started, you lose the ability to show what you changed -- and that is the evidence your renewal depends on.*